PAMS FRESH GENERATION

Create a direct purchase order

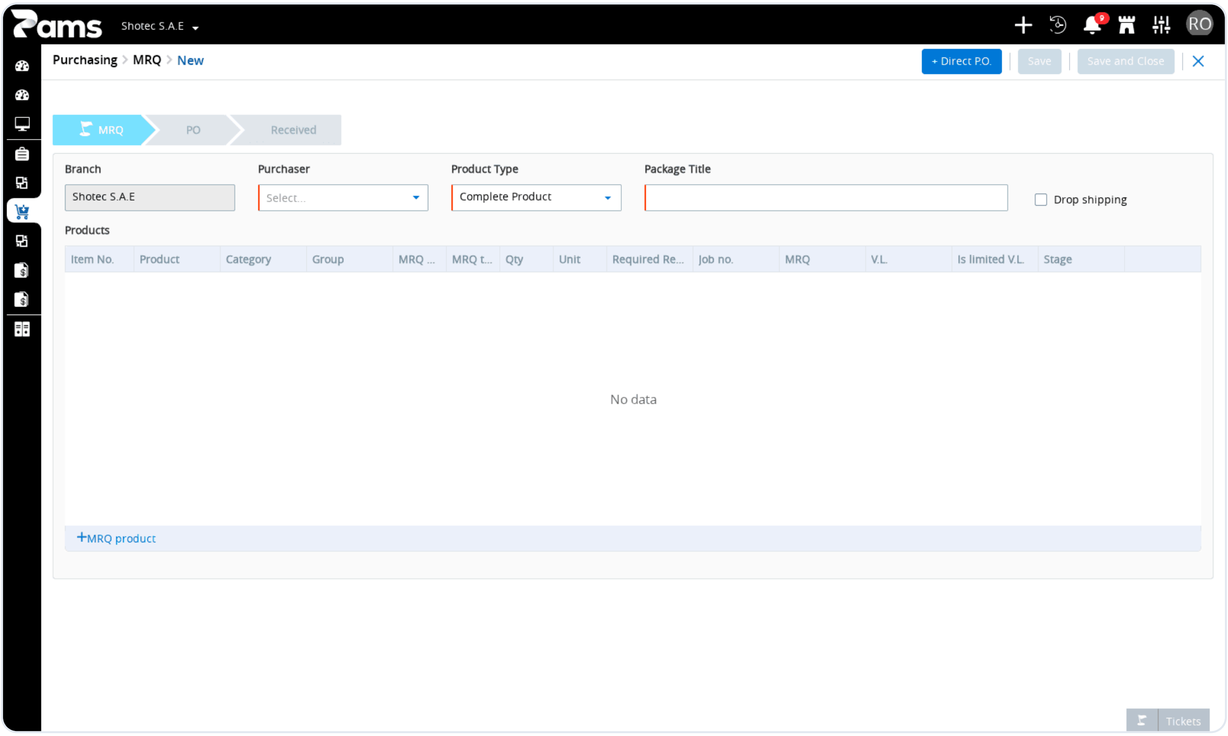
September 10, 2026

Create a direct purchase order

Create a direct purchase order

A direct purchase order is an order you enter from the direct-order route rather than from the
inquiry or offer stages. It belongs to the purchasing flow, where the page identifies the work
with the **MRQ**, **PO**, and **Received** stage indicators.

If you need to…	Go to
Prepare the purchasing workspace	Purchase job procurement chain
Enter the main information and product rows	Enter the main information and products
Complete order-specific fields	Complete the order details
Save the order	Save the direct purchase order
Continue with approval, activation, receipt, or amendment	Purchase job orders



Before you start

Prepare the information and access needed to enter the direct purchase order.

Prepare	Why it matters
The purchaser	**Purchaser** is required on the form.
The product type	**Product Type** is required on the form.
A package title	**Package Title** is required on the form.
The products and quantities for the order	The product area starts with `No data` until product rows are available.
An editable direct-order context	The main fields require the page and subscription conditions to allow the form.

The order panel has additional fields whose required status depends on your company configuration.
Prepare the order information that applies to your work before you enter that panel.

Open the direct purchase-order form

Open the form to create a new direct purchase order.

Prerequisites

- You know the direct-order entry route.
- You have the purchaser, product type, package title, and product information ready.

Steps

1. Select **+ Direct P.O.**.
2. Confirm that the direct purchase-order form is open.

Result: The direct purchase-order form is open.

Understand the direct-order form

The direct-order form combines header information, a product grid, stage indicators, and save
controls on one page.

The header contains **Branch**, **Purchaser**, **Product Type**, and **Package Title**. The required marker appears on **Purchaser**, **Product Type**, and **Package Title**. **Branch** is
shown without a required marker.

The product grid has these rendered columns:

Group	Columns
Product identity	**Category**, **Group**
Requested quantity	**MRQ Qty.**, **MRQ type**, **Qty**, **Unit**
Dates and references	**Required Receiving Date**, **Job no.**, **MRQ**
Vendor-list and progress	**V.L.**, **Is limited V.L.**, **Stage**

The product area can show `No data`. The page also shows the **MRQ**, **PO**, and **Received**
stage indicators, together with **Save** and **Save and Close**.

Enter the main information and products

Enter the header information first, then prepare the product rows that belong in the direct
purchase order.

Prerequisites

- The direct purchase-order form is open.
- You have the purchaser, product type, package title, and product information ready.

Steps

1. In **Purchaser**, select the purchaser for the order.
2. In **Product Type**, select the product type for the order.
3. In **Package Title**, enter the title for the package.
4. Review **Branch**.
5. Review the **Products** area.
6. In the product grid, review **Unit** for each product row.
7. In the product grid, review **Stage** for each product row. The options are `UNVERIFIED`.

Result: The header information is entered and the product area is ready for the order rows.

Complete the order details

The order details describe delivery, payment, status, costs, and item-level values for the order.
The order panel is available only under its page, subscription, editability, order-stage, and
saved-order conditions.

Field	Entry rule
PO No.	Complete it where your company configuration requires it.
Delivery Time	Complete it where your company configuration requires it.
Delivery Term	Complete it where your company configuration requires it.
Forecasted Receiving Date	Enter a date that is not earlier than the order date.
Payment Method	Complete it where your company configuration requires it.
Payment Period	Complete it where your company configuration requires it.
Status	Review the order status. The options are `UNVERIFIED`.
Forecasted Logistics Costs	Enter a non-negative value.

Field	Entry rule
Logistics Costs	Enter a non-negative value.
Rate to	Enter a non-negative rate when the local-currency-rate control is available.

The option values for **Delivery Time**, **Delivery Term**, **Payment Method**, **Payment Period**,
Status, **Unit**, and **Stage** depend on the lists available when the relevant control is shown. The **Product Type** list also depends on the values available when the form is open.

Prerequisites

- The order panel is available for the direct-order state.
- You know the delivery, payment, status, and cost information for the order.

Steps

1. In **PO No.**, enter the purchase-order number when the field is required.
2. In **Delivery Time**, enter the delivery period and select its available time value.
3. In **Delivery Term**, select the available delivery term.
4. In **Forecasted Receiving Date**, enter a date on or after the order date.
5. In **Payment Method**, select the available payment method.
6. In **Payment Period**, enter the payment period and select its available time value.
7. In **Status**, review the available status.
8. In **Forecasted Logistics Costs**, enter a non-negative value.
9. In **Logistics Costs**, enter a non-negative value.
10. In **Rate to**, enter a non-negative rate when the control is available.

Result: The available order details contain the delivery, payment, status, and cost values for
the direct purchase order.

Save the direct purchase order

Use **Save** or **Save and Close** after entering the information required by the form. The page
validates the order before saving.

Prerequisites

- The required header information is complete.
- The available product and order details are complete.

Steps

1. Choose how to submit the order.

If you want to…	Select
remain on the page	**Save**
close the form	**Save and Close**

Result: The form validates the direct purchase order before the save operation continues.

Resolve validation and error messages

Use the message shown on the form to correct the related information, then return to **Save**.

Message	What to do
`Check PO mandatory field(s)`	Complete the required purchase-order fields.
`Please insert at least one PO`	Add a purchase-order entry before saving.
`Check mandatory field(s)`	Complete the required fields marked on the form.
`Please insert at least one product`	Add a product to the product area.
`Order must have at least one item`	Add at least one order item.
`Please enter action for each milstone`	Enter an action for every payment milestone.
`Invalid input. The value must be greater than 0 and cannot exceed 999,999.00`	Enter a quantity greater than 0 and no greater than `999,999`.
`Invalid input. Please enter a non-negative value`	Replace the value with zero or a positive value.
`Invalid input. The tax rate must be between 0 and 100`	Enter a tax rate from 0 through 100.
`An error occurred while processing your request`	Review the entered information and retry the action.

Message	What to do
`Forbidden characters detected. Please remove them and try again.`	Remove the forbidden characters and retry the action.
`Package products cannot be empty`	Add a product to the package before saving.

Result: The form contains values that satisfy the validation message shown for the failed
action.

Continue with the saved purchase order

A saved purchase order continues into the purchase-order workflow. Later work includes approval,
activation, receipt, amendment, and other actions for an existing order.

Select Purchase job orders for those state-dependent actions.

Result: The order is ready for the next purchase-order workflow step.