

Purchase Orders

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Purchase Orders (PO) manage the movement of goods into a manufacturing site from an external supplier.

You can raise a purchase order (PO) in either ERP or MES, and you can receive materials in either system. For example, you might raise a PO in ERP and receive the materials in MES. In this scenario, both the PO and receipt data are available in MES to provide visibility of when inventory becomes available.

Customers typically raise purchase orders and receive materials in ERP. The PO is then imported into Eyelit MES so that expected deliveries can be tracked. This information supports planning and scheduling activities.

In some implementations, the PO is raised in ERP but materials are received in MES. In this case, the PO is used to validate that only authorised materials are received and to maintain traceability between received materials and their suppliers.

You might also choose to raise purchase orders in MES. This approach is typically used where the manufacturing site does not have a sufficiently robust MRP (Material Requirements Planning) capability within ERP to generate purchase orders.

When materials are received in MES, the imported PO data is used to validate receipts and prevent the receipt of materials that have not been ordered. It also provides traceability by linking received materials used on the shop floor back to the relevant purchase orders and suppliers.

Integration between ERP and MES ensures that up to date purchase order data is synchronised between systems where a full ERP solution is in place.

Organisations

When you are buying goods from a supplier, the Purchase Order represented in MES needs to detail who it is with.

The organisations entity allows you to configure key details about suppliers (and customers) that can then be referenced in Purchase Orders (and Dispatch Orders). For more information, see [Organisations](#) documentation.

Customer / Supplier

There may be more than one supplier / customer for a product. In the Products screen you can manage multiple suppliers / customers and set a default for each. For more information, see [Customer/Supplier](#) documentation.

Purchase Order structure

The Purchase Order header contains information about the overall order and who the contracted order is with.

Each line item details exactly which products are expected, how much, and when they are due.



Note

It is common for a single PO to cover multiple deliveries, potentially of the same product e.g., a company place a bulk order for 6 months' worth of raw materials but cannot / do not want to store it all on site, so 'call off' an

amount to be delivered each week.

POs have a header, containing details of the contracted purchase order with the supplier, including the PO number and the source organisation.

Note that the PO number can be configured to generate automatically – serial range is defined in App Properties.

Purchase Order header

1. Navigate to the **Purchase Orders** page and click the **Add** button to display the **Add Purchase Order**.

Add/Edit Purchase Order

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Purchase Order No:** PO number in the MES. The system will assign a unique PO number if this field is left blank.
- **Supplier Ref:** Supplier order reference.
- **Order Raised:** Date the order was raised.
- **Organisation*:** Select the supplier from the drop down.
- **Comment:** Leave a comment.
- **Supplier Contact:** Contact name, address and email for the supplier.

Print

Select a PO and click **Print** to view the PO. Click **Menu** for a list of options such as printing, or saving as an Excel file, PDF, CSV, etc.

Line Items

Line items have a minimum quantity (e.g., 985 kg) and a maximum quantity (e.g., 1050 kg) against an ordered quantity (e.g., 1000 kg). Often the minimum and maximum quantities are the same (e.g., to receive exactly 5 items).

You may not receive more than the maximum quantity specified on a PO line. You can't close the PO line if you haven't received the minimum quantity. After receiving the minimum quantity, you can manually close the line. If you've received the ordered quantity (or more up to the maximum quantity), the line item will be closed automatically.

When all the lines on the PO have been closed, the PO header can be closed.

Line items can be added to a PO as follows:

1. Select the PO, and in the **Line Items** window (below the **Purchase Orders** grid), click the **Add** button to display the **Add Line Item** pop-up.

Add / Edit Line Item

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Product*:** Select the product being ordered. The list of products will be filtered to just those products configured for the supplier organisation. For more information see [Products](#).
- **Description:** This displays the description for the selected product.
- **Line No:** Specifies where in the list of line items this item appears.
- **Qty Ordered*:** Quantity of the product ordered.
- **Min Qty:** Minimum quantity required per order.
- **Max Qty:** Maximum quantity allowed per order.
- **Unit of Measure:** UOM for the order line.
- **Expected Receipt:** Date the product is expected to be received.
- **Unit Price:** Purchase price per unit of the product.

- **Supplier Part No:** Product's supplier part number.
- **Supplier Notes:** Supplier notes related to the line item.
- **Comment:** Leave a comment for the line item.
- **Due:** Date the product is due for delivery.

Receive

To receive a line item on a PO:

1. Navigate to the **Purchase Order** page and select the PO that contains the line item to be received.
2. Select the line item and click **Receive** to display the **Receive** input screen.

Receive

- **Line Items:** Select a line item associated with the PO.
- **Description:** Optional description of the line item.
- **Qty Ordered:** Quantity of the line item ordered.
- **Qty Received:** Quantity being received. This is not always the same as the quantity ordered.
- **Qty Remaining:** Difference between the quantity ordered and the total received so far.

Delivery Details

- **Delivery No:** Delivery number for the line item.
- **Location*:** Where the line item is received to.
- **Comments:** Leave a comment.

Lot Details

- **Batch Number:** Batch number of the item being received.
- **Product Version:** Product version being received.
- **Expiry:** Expiry date.
- **Owner:** Product owner.

Item Details

- **Serial No*:** For some items a serial range is configured to auto generate, for others this information needs to be entered.
- **Unique ID:** Unique ID of the item received.
- **No of Items:** Number of items received.
- **Qty Per Item:** Quantity contained in each item and UOM
- **Unit Price:** Price per item as defined in the product setup.

Label Details

- **Label Type:** Select the label type for the product which will filter the **Label Design** field.
- **Label Design:** Select the label design.
- **Printer:** Select the printer where the labels will be printed.
- **Qty of Labels:** How many labels to print.

The table under the Label Details section shown in the image below, shows the information contained in the prompt fields. All other label fields are automatically generated.

Receive Stock
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Product Details

Product PeterS_TestProduct1 ▼

Description

Item Details

Serial No **Unique Id**

No Of Items **Qty Per Item** EA ▼

Label Details

Label Type CS-ProductLabel ▼

Label Design PS test 4 (Version: 1) ▼

Printer Microsoft Print to PDF ▼

Qty Of Labels

Share Name	Source	Value
TextPart3	Prompt	aaa

Validation Mode Production ▼

Recently Received
Receive
Close

Close

A line item can be manually closed if the minimum quantity has been received. The line item will automatically close when the ordered quantity was received.

History

Click the History button to display the receipt history of the selected PO line. To manually adjust the quantity received:

1. Click Adjust to display the **PO History** pop-up.
2. Provide the quantity you want to adjust by in the **Qty Adjust** field. Use negative values to reduce the quantity received.
3. Select a reason type and reason for making the adjustment, and leave a comment if required.

Edit

It is possible to edit the PO history where you can provide or update a delivery number, invoice number and comment.

Report

You can view PO line item information in the **Purchase Order Line Items** Power BI report.