

Purchase Orders

Purchase Orders

Purpose and when to use this record

Create and manage purchase orders from vendor commitment through partial or complete receiving.

At a glance

- **Identify it by:** **Purchase #**, **Status**, **Date Created**, and **Ship Date**.
- **Check its business context:** **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent**.
- **Why care:** Warehouse, item, unit, quantity, and cost must describe the same physical movement. A wrong warehouse or unit can make availability and valuation misleading.
- **Why care:** Status communicates workflow progress to other staff. Change it only when the underlying work, approval, payment, or handoff has actually occurred.

Before you begin

You need the Brisk permission for the action you are taking on purchase orders. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a Purchase

Create a Purchase only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent**.
2. Enter the identifying values shown on the form, especially **Purchase #**, **Status**, **Vendor**, **Warehouse**, **Date Created**, and **Ship Date**, plus the remaining screen fields.
3. Review **Status**, and **Submitted To Vendor** deliberately; these choices control availability or workflow rather than merely describing the record.

4. Save the Purchase, then confirm **Purchase #**, **Status**, **Date Created**, and **Ship Date** on its detail page before continuing.

After saving: Send the approved order to the vendor, then receive actual deliveries against it; partial receipts should leave the unreceived balance open.

Delete a Purchase

Delete this Purchase only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

Before confirming, check for related **Inventory Receipts**, **Inventory Records**, **Purchase Rows**, and **Transactions**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Purchase #**, **Status**, **Date Created**, and **Ship Date**. After confirmation, return to the Purchase Orders list and make sure only the intended Purchase was removed.

Review Purchase details

Tue, Aug 11, 2026

Search Here

Search For...

My site > Inventory > Purchase List > DOC-PO-1001

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ModifyCancelNewCreate CopyReceive Items< PreviousNext >Attachments (0)Email

Purchase Detail - DOC-PO-1001

System ID: 3

Purchase Summary

All Fields

Purchase Rows

Inventory Receipts

DOC-PO-1001

Jan. 15, 2025, 9 a.m.

Ship Date: 01/16/2025

PARTIALLY RECEIVED

Receipts: [Inventory Receipt 3 \(Vendor# DOC-BILL-1001\)](#)

DOC-V-001 | Northwind Office Supply (Documentation Demo)

100 Fictional Way

Exampleville, IL 60000

Memo: Documentation demo: ten cartridges ordered.

Freight: \$0.00

Freight Vendor: -

Item	Vendor Item #	Description	Quantity	Cost	Total Cost	✓
DOC-ITEM-001 - Doc Demo Filter Cartridge		Documentation Demo Filter Cartridge	10.00	\$12.50	\$125.00	
				Subtotal:	\$125.00	
				Freight:	\$0.00	
				Total:	\$125.00	

A fictional purchase order after six of ten items have been received.

Use the detail page as the shared record of what this Purchase currently means. Verify **Status**, **Date Created**, **Ship Date**, **Subtotal**, and **Total** before relying on it for a decision.

Follow **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent** to determine whether the issue is on this Purchase or on one of those linked records.

Next check: Send the approved order to the vendor, then receive actual deliveries against it; partial receipts should leave the unreceived balance open.

Edit an existing Purchase

Tue, Aug 11, 2026

Search Here

Search For...

My site > Inventory > Purchase List > DOC-PO-1001

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SaveCancelDelete< PreviousNext >Status OverrideQuick-Add Item

Purchase Update - DOC-PO-1001System ID: 3

Purchase #DOC-PO-1001StatusPartially Received

VendorDOC-V-001 | Northwind Office Supply (Documentation Demo)WarehouseDOC-W-001 - Documentation Demo Warehouse

Date Created2025-01-15 09:00:00Ship Date01/16/2025

Submitted to VendorSubmittedMemoDocumentation demo: ten cartridges ordered.

Freight0.00Freight Vendor

Parent

Purchase Rows

Item	Quantity	Cost	Total Cost	Description	Delete
DOC-ITEM-001 - Dt	10.00	12.50000	125.00	Documentation Demo Filter Cartridge	

Add Row

SubTotal125.00

Total125.00

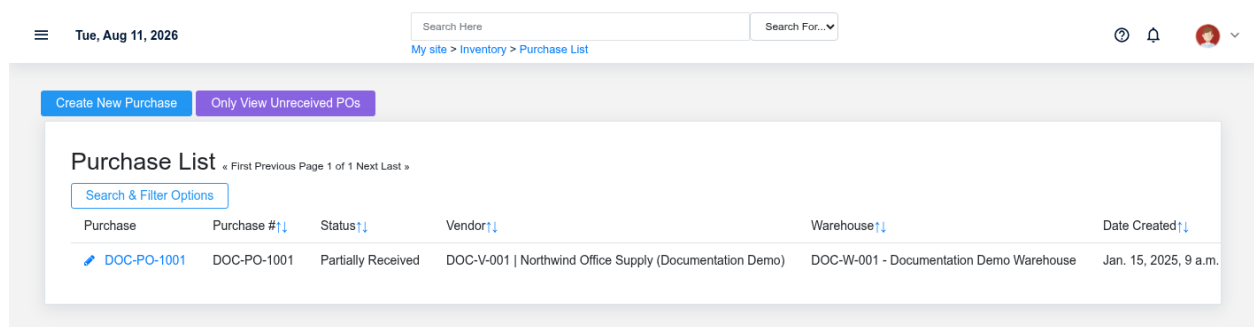
The Purchase Orders update screen in the Brisk documentation demo.

Edit this Purchase to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent** with the supporting document or approved request.
2. Recheck **Status**, **Vendor**, **Warehouse**, **Date Created**, **Ship Date**, and **Subtotal**, plus the remaining screen fields. These values are most likely to change warehouse availability, replenishment, quantities, and valuation.
3. Save the change, return to the list, and confirm that the Purchase now appears under the expected **Status**.

After the change: Send the approved order to the vendor, then receive actual deliveries against it; partial receipts should leave the unreceived balance open.

Find and review purchase orders



The Purchase Orders list screen in the Brisk documentation demo.

Use the Purchase Orders list to find the correct record before opening or changing it. Compare **Purchase #**, **Status**, **Date Created**, and **Ship Date**. Records with similar names or numbers can still belong to different **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent**.

- Keyword search checks **Memo**, and **Status**.
- Narrow the list with **Vendor**, and **Warehouse** filters.
- The date filter uses **Ship Date**; choose a range that matches the business event you are reconciling.
- The initial order emphasizes **Purchase #**. Select a column heading when you need a different comparison.

Open the Purchase whose **Purchase #**, **Status**, **Date Created**, and **Ship Date** match the task. If it is missing, clear the list filters and recheck **Vendor**, **Warehouse**, **Ship Date**, and **Status** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 13 user-relevant fields for this Purchase, including 4 linked-record selections and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Purchase #	No	The purchase # recorded for this purchase.
Status	No	Current status of this purchase. Available values: Draft, Submitted, Partially Received, Received, Overridden.
Vendor	No	The vendor associated with this purchase.
Warehouse	No	The warehouse associated with this purchase.
Date Created	No	Date and time recorded for date created on this purchase.
Ship Date	No	The date that this purchase order is scheduled to ship from the vendor.
Submitted To Vendor	No	Whether the submitted to vendor option applies to this purchase.
Memo	No	The memo recorded for this purchase.
Subtotal	No	The sub total value recorded for this purchase.
Freight	No	The total freight cost for this purchase order. This value is copied to receiving tickets created from the purchase order.
Freight Vendor	No	Sets the freight vendor associated with this purchase order; assumed to be FOB if left blank.
Total	No	The total value recorded for this purchase.
Parent	No	Parent purchase in the hierarchy.

What happens next

Send the approved order to the vendor, then receive actual deliveries against it; partial receipts should leave the unreceived balance open.

Common mistakes and troubleshooting

- **The record saved but is not available where expected:** Recheck **Status**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.

- **The values look right but the result is wrong:** Open **Vendor**, **Warehouse**, **Freight Vendor**, and **Parent** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.
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