

# BILLING AND PAYMENT

## PURCHASE ORDERS

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The **Purchase Orders** tab displays the Purchase Orders (POs) associated with your account. The **Information** icon on the **Balance** and **Status** columns provides additional information for each category.

### ADD PO

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1. To create a Purchase Order, click the **Add PO** button.
2. Enter the required information in the **PO Details** section and upload the PO file in the **Upload PO File** section.
3. Click the **Add PO** button to add the PO.
4. A “PO successfully added” message will appear to confirm the PO is added. Then, click the **Continue** button.

### EDIT PO

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1. To edit a PO, click the **Ellipsis (three horizontal dots)** on the required line item and select the **Edit PO** option from the drop-down list.
2. To view a PO, click the PO line item.
3. You can edit the PO by clicking the **Edit PO** button to make any changes.
4. Then click the **Save PO** button.
5. A “PO successfully updated” message will confirm that the updates to the PO are saved. Click the **Continue** button.

### DELETE PO

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1. To delete a PO, select the **Delete PO** option from the Ellipsis (three horizontal dots) menu.
2. A confirmation message will pop up stating “Are you sure you want to delete PO?”
3. Click **Continue** to confirm that you want to delete, which will remove the PO from all open contracts and open invoices.

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## BILLING AND PAYMENTS CONTINUED

### SPLIT PO

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A Purchase Order can be split into two or more rental agreements and/or invoices

1. Select the **Edit PO** option from the **Ellipsis (three horizontal dots)** menu to split a PO.
2. Click the **Add Agreement** in the **Linked Rental Agreements** section.
3. Enter the Agreement number in the **Search** field.
4. Select the **Rental Agreement** number checkbox.
5. To split the PO into multiple agreements, enter the desired payable amount in the **Split** field. This shows the amount intended for payment against the total agreement amount of that PO.
  - a. To split an invoice by amount or percent, click the \$/% drop-down arrow.
6. To split a PO at the invoice-level, click the **Add Invoice** button, and select the **required invoices** by checking the box or search for the required invoices.
7. Select to split a PO by amount or percentage from the **Split** drop-down list.
8. To split an invoice by date duration, select the **Define Split Duration** checkbox, then enter the date duration in the **Split Date Duration** field. Please note that the Define Split Duration checkbox will only appear if you enter some split value.
9. Click the **Add Invoice** button. Then click on **Save PO** to save the split purchase order details.