Creating A County Purchase Order In Finex

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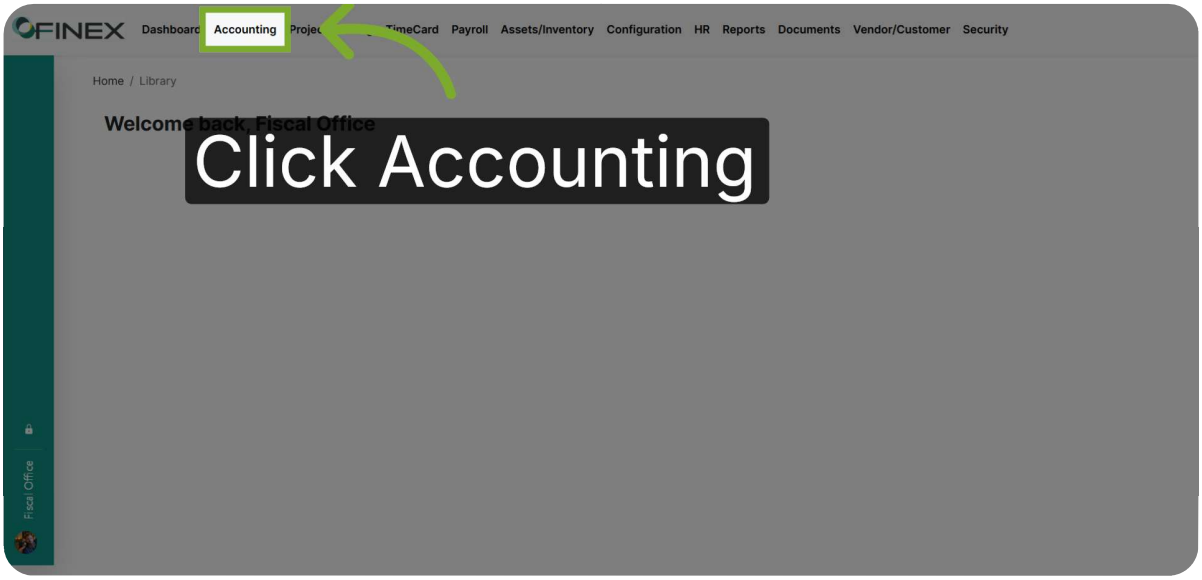
This tutorial guides you through creating a County Purchase Order in Finex.

Go to www.finexweb.com

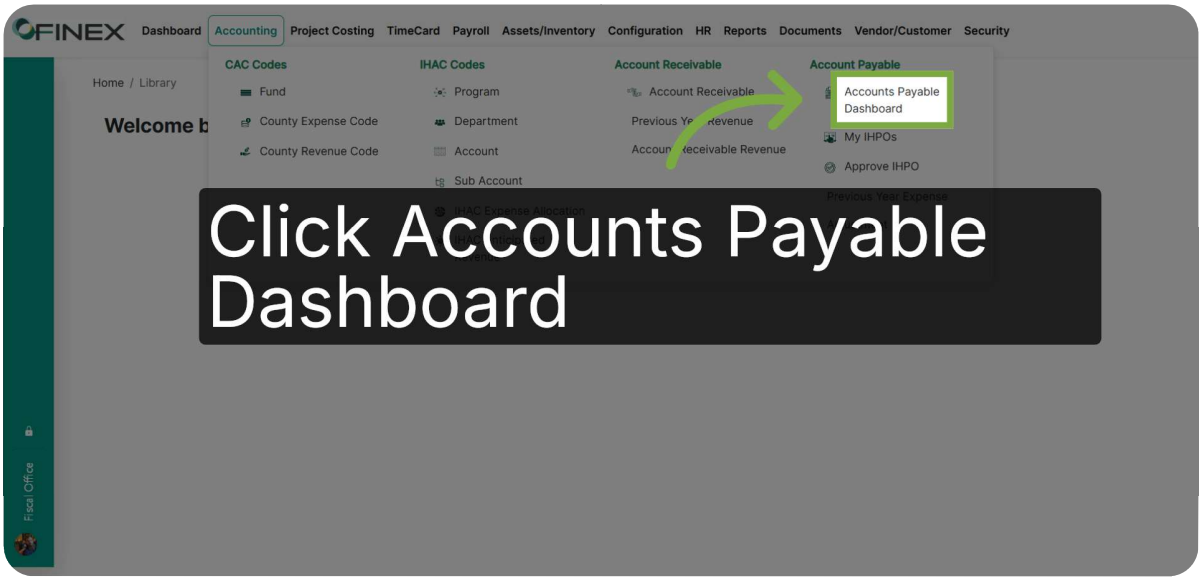
01 Access Accounting Section

Click Accounting to access the Financial section of Finex.



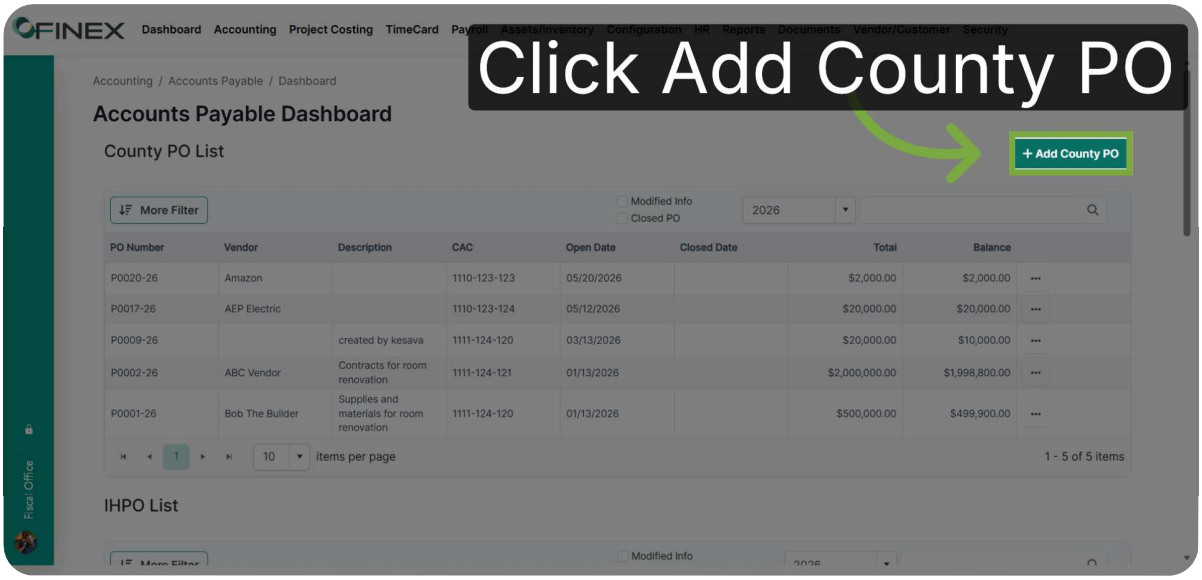
02 Open Accounts Payable Dashboard

Click the Accounts Payable Dashboard to access where you can create, edit, and manage your County Purchase Orders.



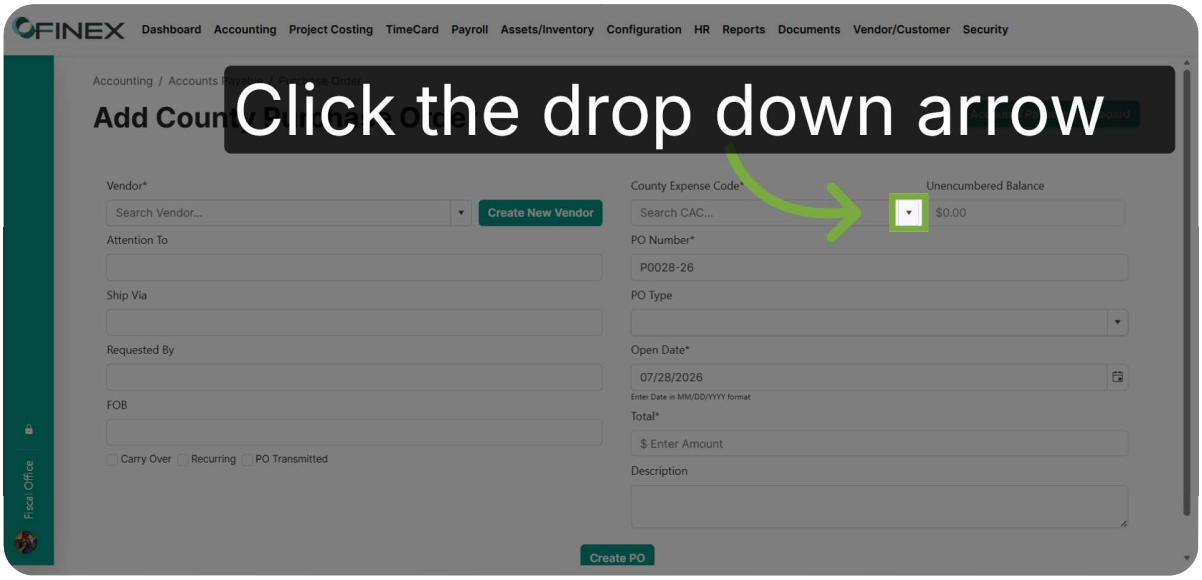
03 Select Add County PO

Click Add County PO to start the process of creating a County Purchase Order.



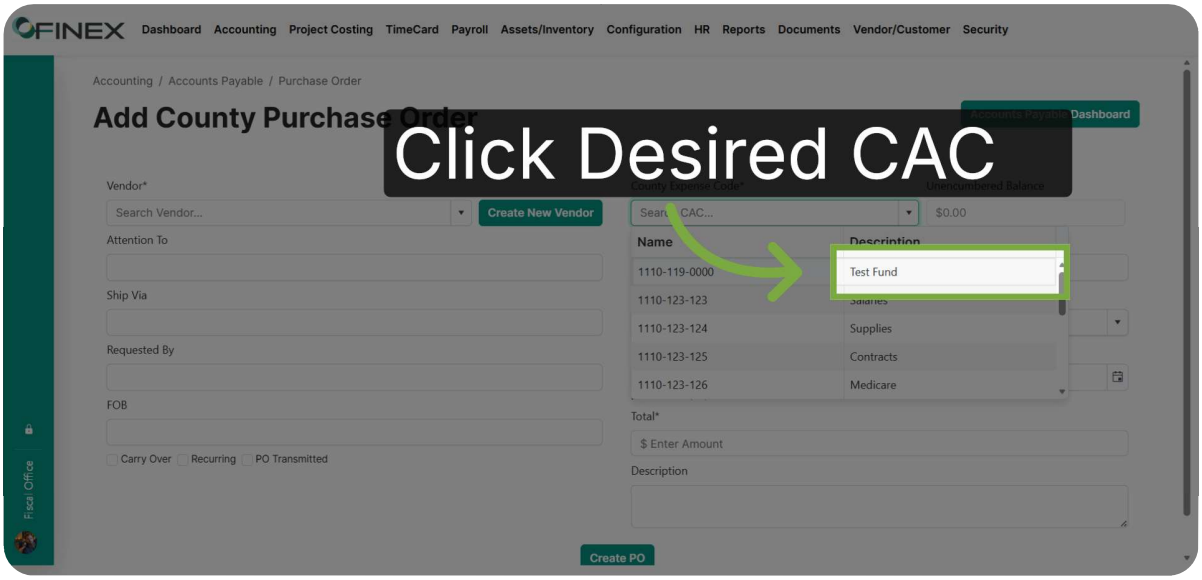
04 Open County Selection Menu

Click the drop-down arrow to select your County Expense Code.



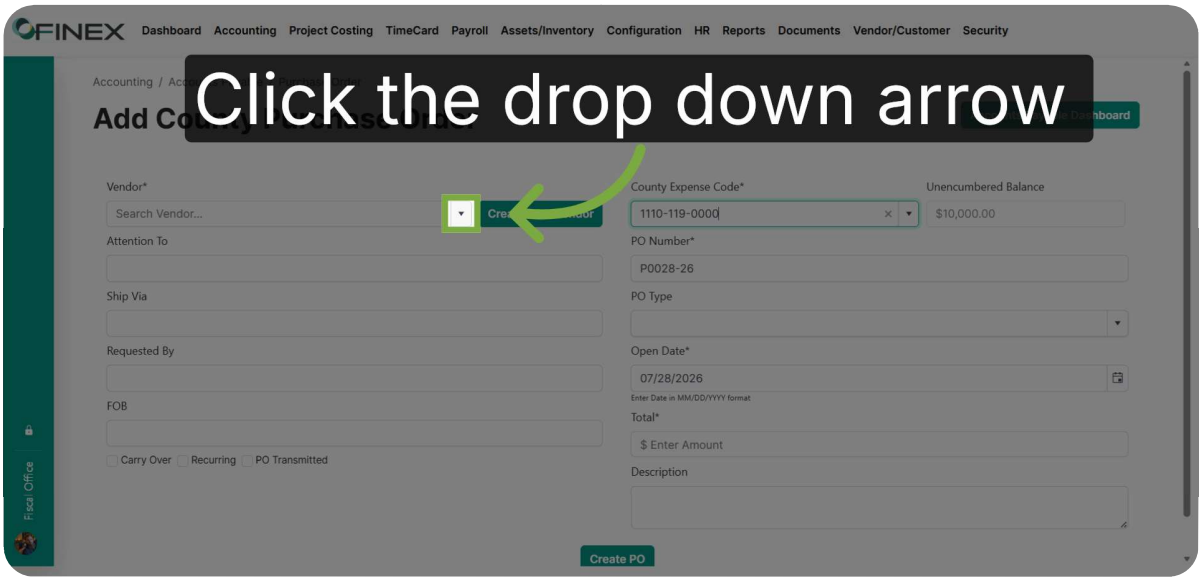
05 Select Desired County Expense Code

Click the desired County Expense Code from the drop-down list.



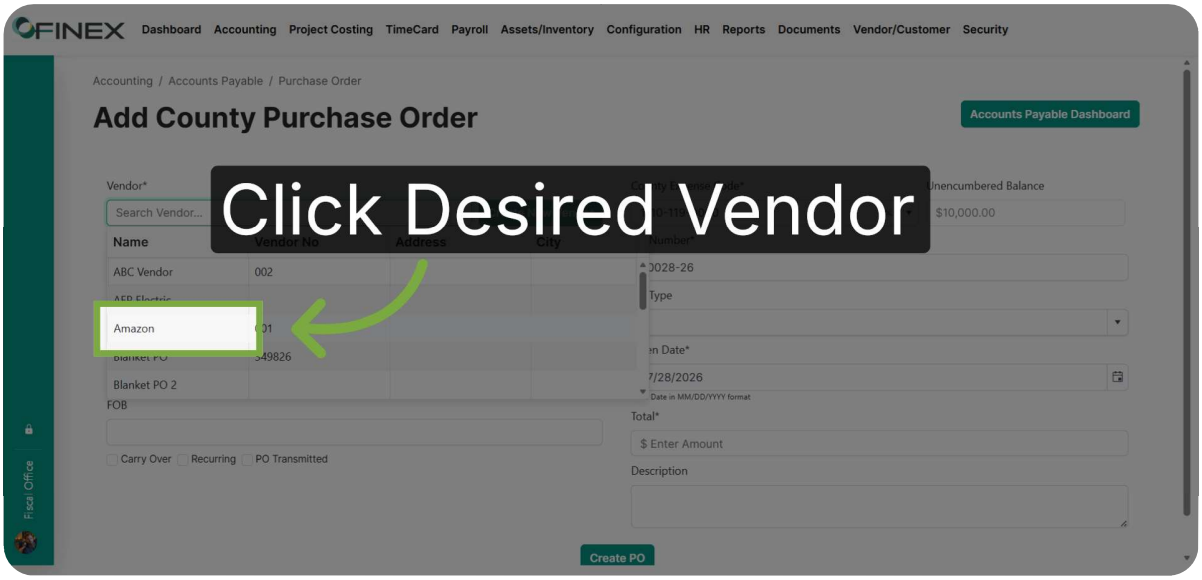
06 Open Vendor Selection Menu

Click the drop-down arrow to select your vendor for your County Purchase Order. If you are creating a Blanket or Multiple Vendor Purchase Order, you will need to select Blanket or Multiple Vendor as your Vendor choice for the Purchase Order. This cannot be left blank.



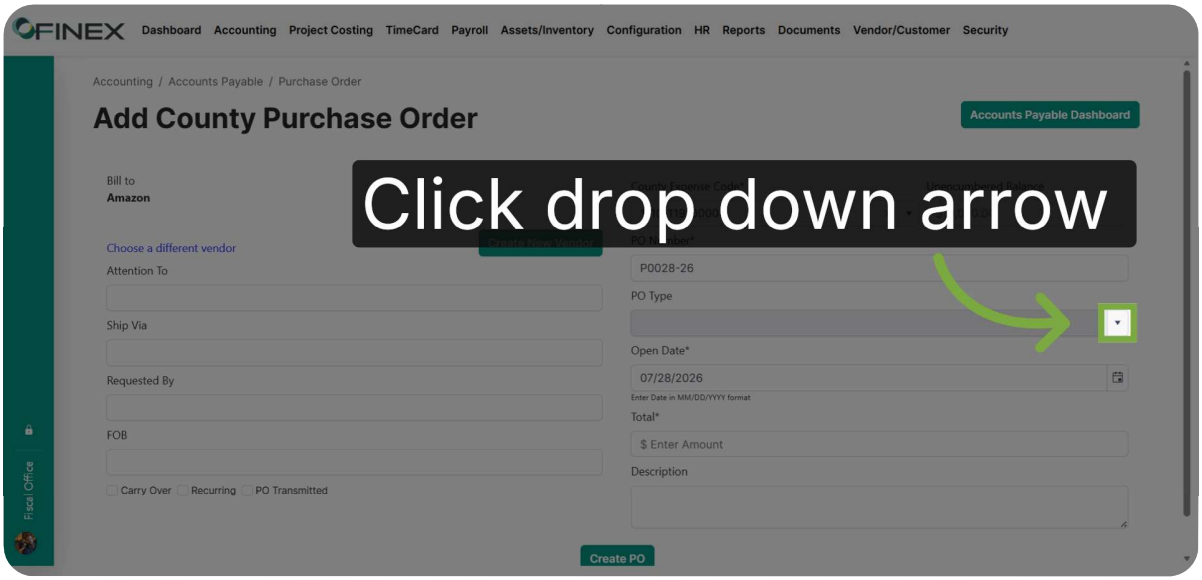
07 Select Desired Vendor

Select your desired Vendor from the drop-down list.



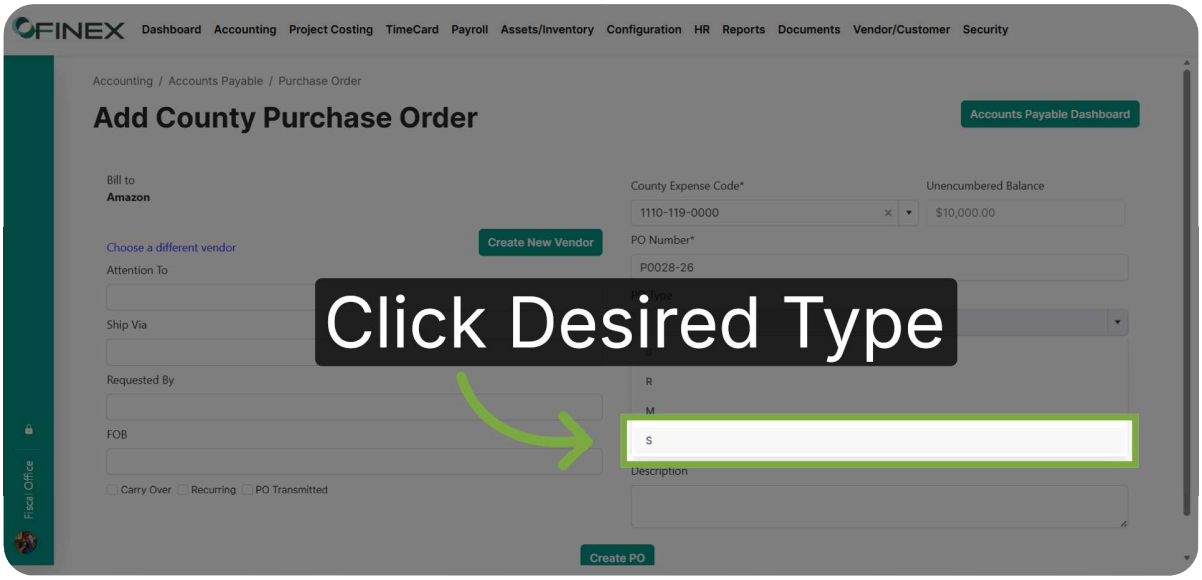
08 Open PO Type Selection Menu

Click the drop-down arrow to select your Purchase Order Type, if your county uses Purchase Order Types.



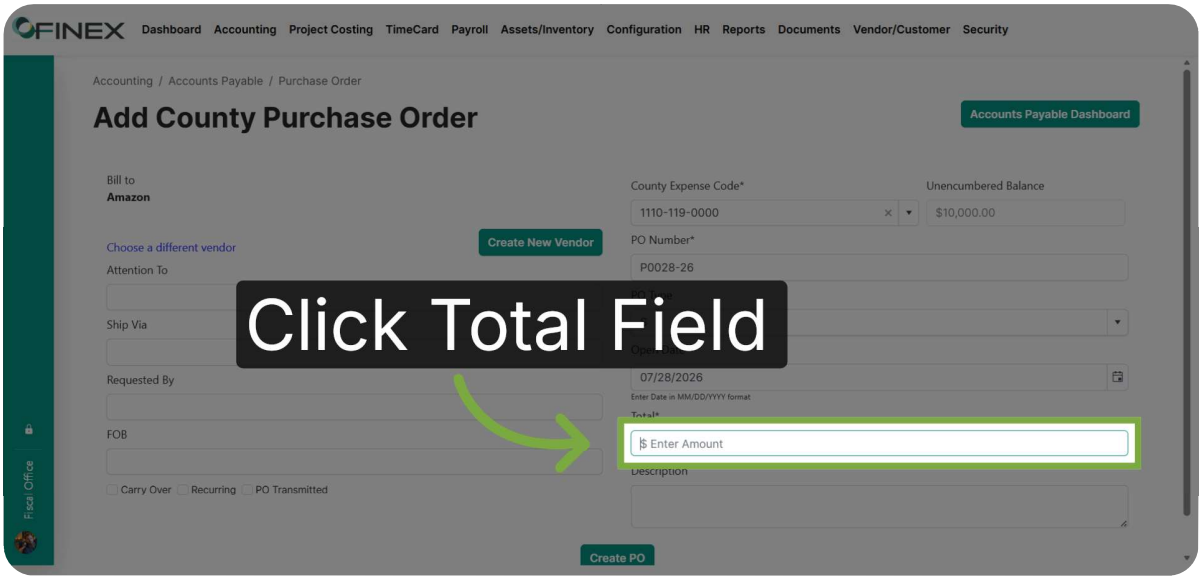
09 Select Desired PO Type

Click your desired Purchase Order Type from the drop-down list.



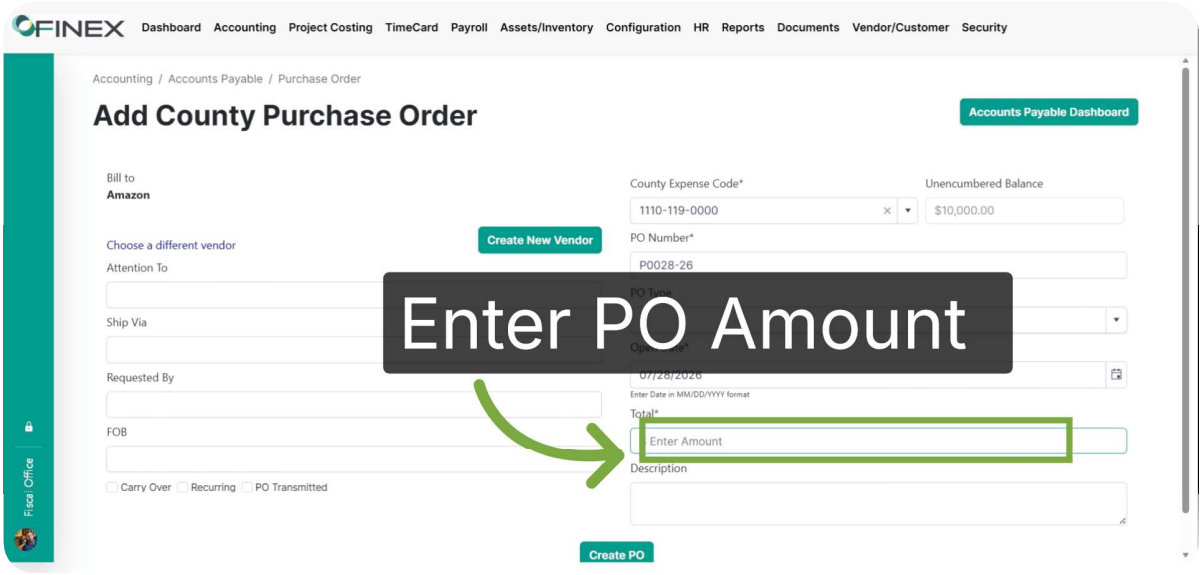
10 Select Total Field

Click the Total Field.



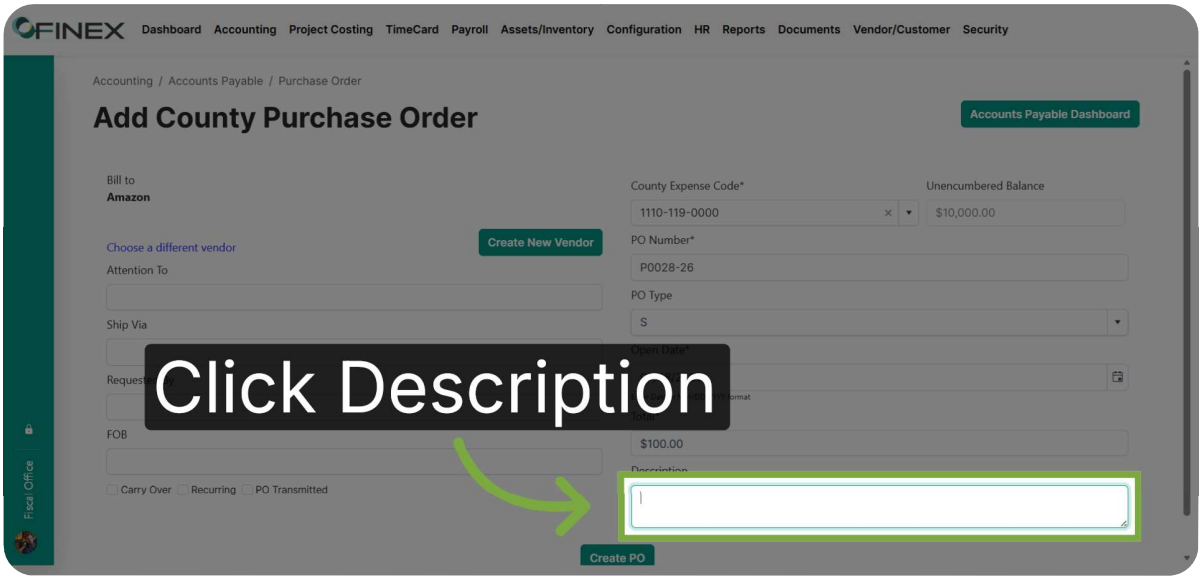
11 Enter PO Amount

Enter the amount of your Purchase Order.



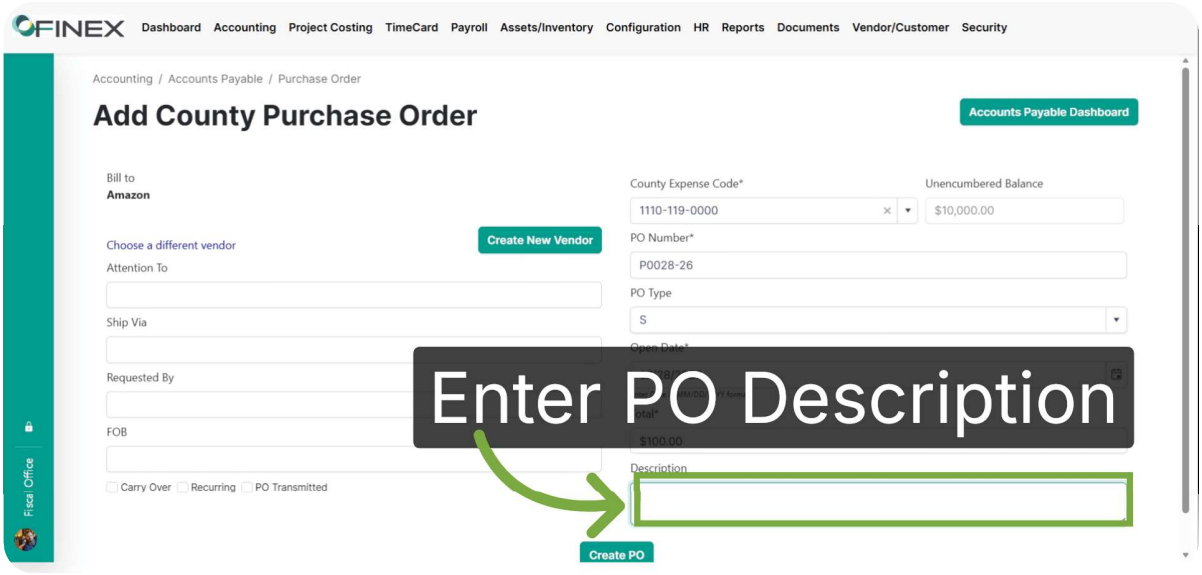
12 Select Description Field

Click the Description Field.



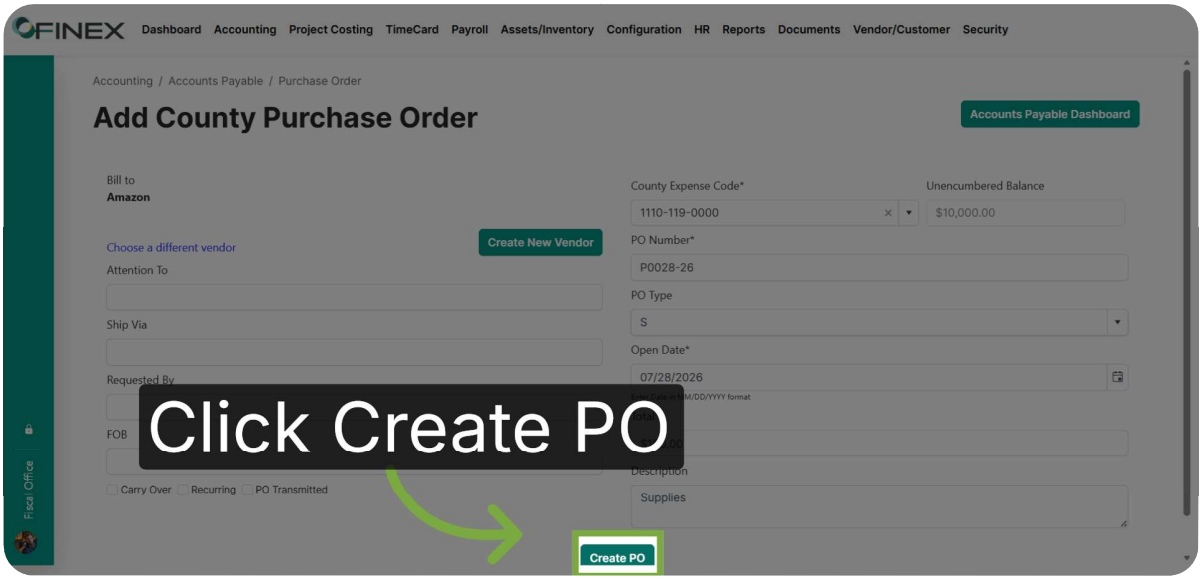
13 Enter PO Description

Enter your Purchase Order description.



14 Select Create PO

Click Create PO to finish creating your County Purchase Order.



You have now successfully created a County Purchase Order in Finex. You can use the Accounts Payable Dashboard to edit, view, or create other County Purchase Orders.

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