# Budgets and Purchase Orders

This chapter explains how Customer Purchase Orders (POs) are created, managed, and linked to schedules and plan lines within MEplan.

# Creating Customer Purchase Orders

To create or manage Customer Purchase Orders:

1. Navigate to the **Budgets** tab on the plan
2. Select **Customer POs**

If a Customer PO already exists in MEvision, the PO number will be available for selection in the **Code** drop-down menu.

To create a new Customer PO:

1. Select the **options menu ( )**
2. Choose **Create PO**
3. Enter the PO number and the budget value for the plan
4. Select **Save ( )**

Customer POs can be created at a **Medium Type** level or without a medium specified:

- Medium-specific POs apply only to schedules or plan lines using the same Medium Type
- POs without a specified Medium Type can be used across all schedules and plan lines

# Attaching Customer PO Documents

Customer PO documents can be attached directly to the PO record.

To attach a document:

1. Select the **options menu ( ⋮ )** on the PO line
2. Choose **Upload new Document / Select existing Document**
3. Upload the Customer PO file and select **Proceed**

The document will appear in the **Documents** tab and will be hyperlinked on the PO line item.

# Linking Customer POs to Schedules and Plan Lines

Linking a Customer PO allows MEplan to track budget usage and remaining balances.

To link a PO to a schedule listed on the plan:

1. Select the **options menu ( ⋮ )** on the schedule line
2. Choose **Edit Schedule**
3. Select the appropriate PO from the **Customer PO** drop-down

To link a PO to a single schedule lines:

1. Navigate to the **Schedule's line**
2. Double click the **Customer PO** field on the line
3. Select the relevant Customer PO number in the field's look-up
4. Select the plan line's **Save icon (  )**

To link a PO to multiple schedule lines:

1. Navigate to the **Schedule**
2. Select the checkbox next to the relevant plan lines (selecting the top checkbox allows a user to select all lines once a filter is applied)
3. Select the schedule's **options menu (  )**
4. Select **Update Selected**

In the **Bulk Update** window:

1. Select the appropriate PO number
2. Select **Update All** to save

Once linked, the PO number will appear on the schedule line items and a budget breakdown will be visible on the **Budgets** tab.

# Viewing PO Values and Budget Breakdown

Customer Purchase Orders can be viewed in multiple locations:

- The **Totals** tab on the campaign
- The **Master Data** tab under **Customer Orders**
- The **Customer Card** under **Customer Orders**

Customer Order numbers are hyperlinked. Selecting a Customer Order opens a breakdown of all plan lines linked to that PO across multiple campaigns.

Customer PO breakdowns can also be exported to Excel for reporting and reconciliation purposes.