Purchase Orders in Deep Space

Raising, approving, sending and executing purchase orders against your project budget

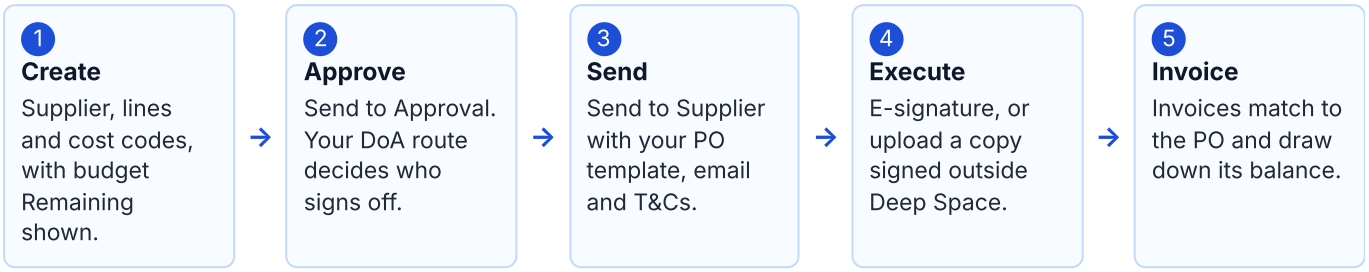
Deep Space web app · Commercial · October 2026 · For project managers, contract administrators and accounts teams

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1. What this feature does

A purchase order commits project money to a supplier before the work or materials arrive. In Deep Space you raise the PO against the project's budget codes, send it through your Delegation of Authority for approval, issue it to the supplier as a branded PDF, and record it as executed. From then on, every supplier invoice is matched against it.

Because each PO line carries a cost code, approved POs flow straight into **Committed** on the Budget Register, and the cost code picker shows how much budget is left before you commit more.



2. When to use it

- Ordering materials, plant hire, consultants or small trade packages that do not need a full subcontract.
- You need an order number for a supplier now, even before the final price is known.
- Your accounts team needs something to match each supplier invoice against before it is paid.

3. Before you start

- **The project has a budget.** The cost code picker lists this project's budget codes with their Revised and Remaining amounts. With no budget, it shows all cost codes instead.
- **The supplier is in the Company Directory.** Add them first if they are new. The Directory warns you if the supplier's tax ID has not been verified.

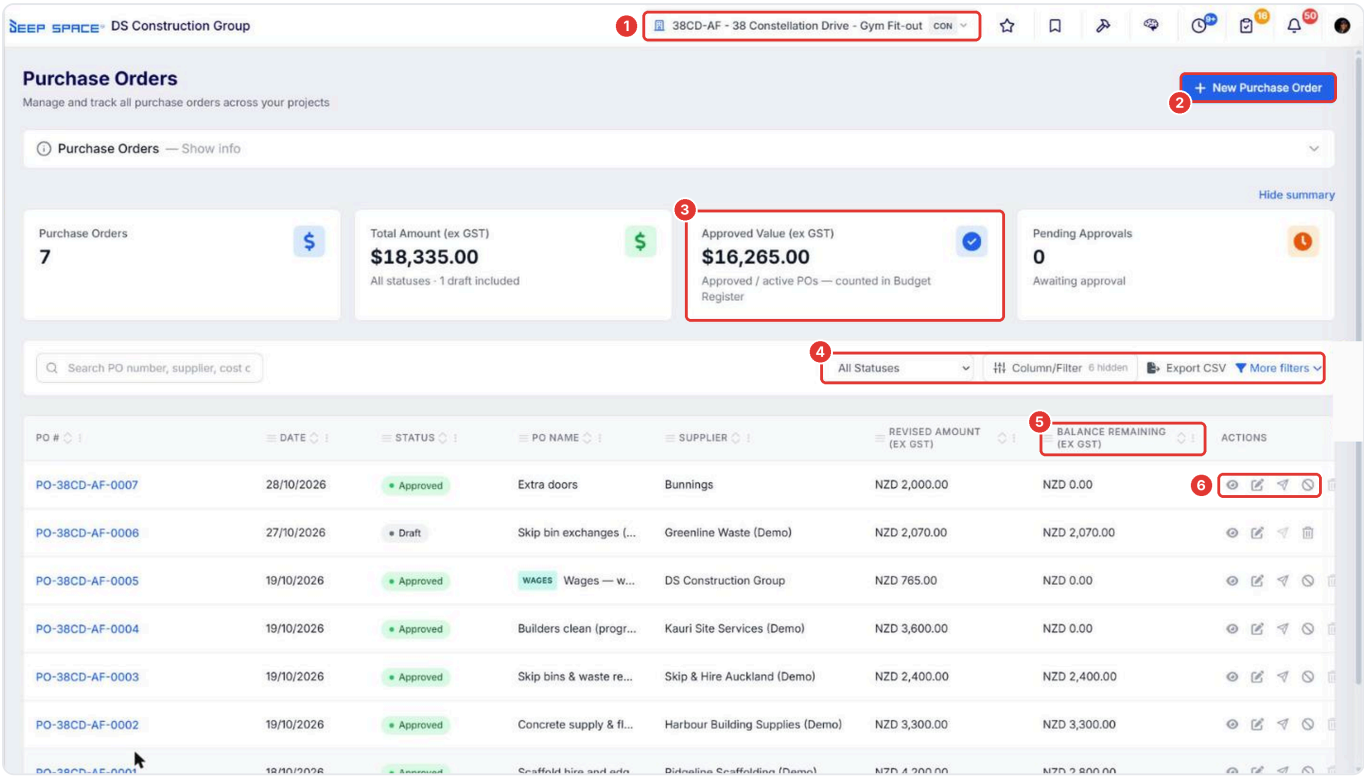
- **An approval route is set up** under Delegation of Authority, so POs go to the right people.
- **Company Settings are complete** (legal name, ABN or NZBN, address). The PO PDF cannot be downloaded, sent or signed until they are.
- **Optional:** a Purchase Order document template and default T&Cs (see step 5).

4. Step-by-step guide

STEP 1

Open the PO Register for your project

1. Choose your project in the project selector at the top of the screen.
2. Open **Commercial › Purchase Orders › PO Register**.

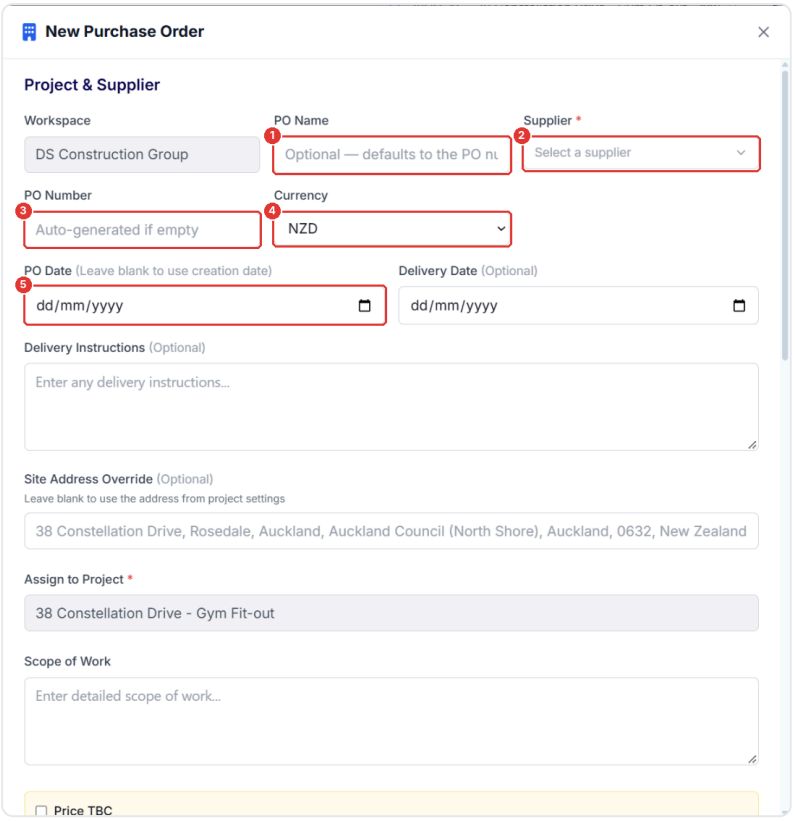


1. The project selector. The register shows this project's POs.
2. **New Purchase Order**.
3. **Approved Value** is what counts in the Budget Register. Drafts are shown in the total but not counted.
4. Status filter, **Column/Filter**, **Export CSV** and **More filters**.
5. **Balance Remaining**: what is left to invoice on each PO.
6. Row actions: view, edit, send and cancel. Only a Draft PO can be deleted.

STEP 2

Fill in the PO header

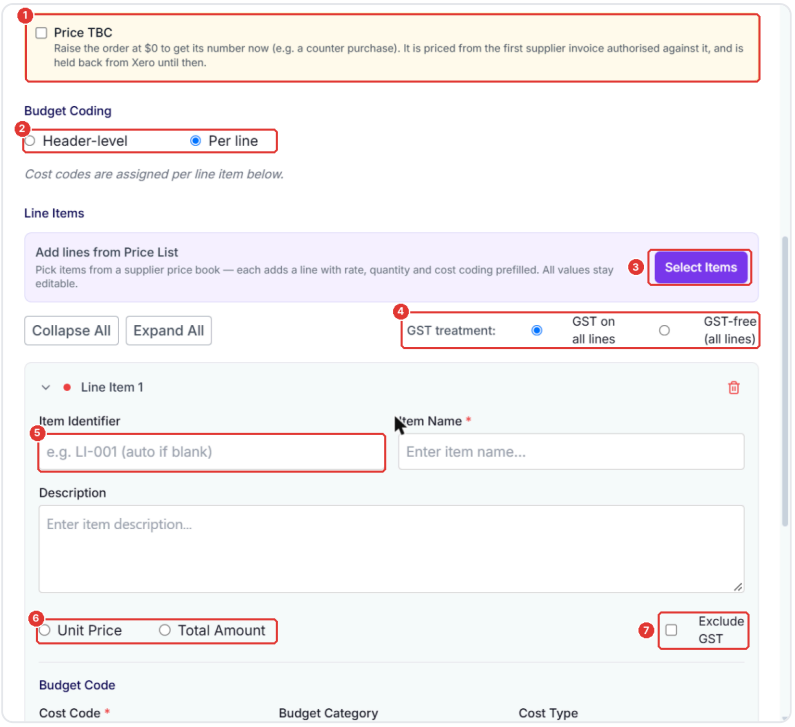
Click **New Purchase Order**. Only the supplier is required at the top. Everything else has a sensible default.



1. **PO Name** is optional. Leave it blank and the PO number is used.
2. **Supplier** (required), from the Company Directory.
3. **PO Number** is generated automatically if you leave it empty, as soon as the PO is saved.
4. **Currency** defaults to your workspace's country.
5. **PO Date**: leave blank to use today. Add a **Delivery Date**, delivery instructions or a site address override if you need them.

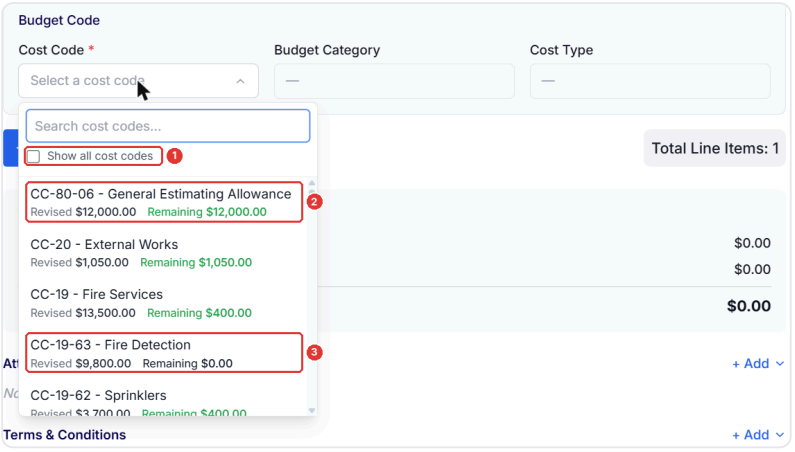
STEP 3

Add the lines and cost codes



1. **Price TBC**: raise the order at $0 to get its number now (for example a counter purchase). It is priced from the first supplier invoice authorised against it, and held back from Xero until then.
2. **Budget Coding**: one cost code for the whole PO (**Header-level**) or a cost code on each line (**Per line**).
3. **Select Items** adds lines from a supplier price list, with rate, quantity and cost coding filled in.
4. **GST treatment** for the whole PO: **GST on all lines** or **GST-free (all lines)**.
5. **Item Identifier** is optional and filled in automatically if blank. **Item Name** is required.
6. Price each line by **Unit Price** (quantity × rate, up to 4 decimal places) or **Total Amount**.
7. **Exclude GST** for a single GST-free line.

Choose a **Cost Code** for each line. The list shows this project's budget codes first, each with its **Revised** budget and how much is **Remaining**, refreshed every time you open the form.

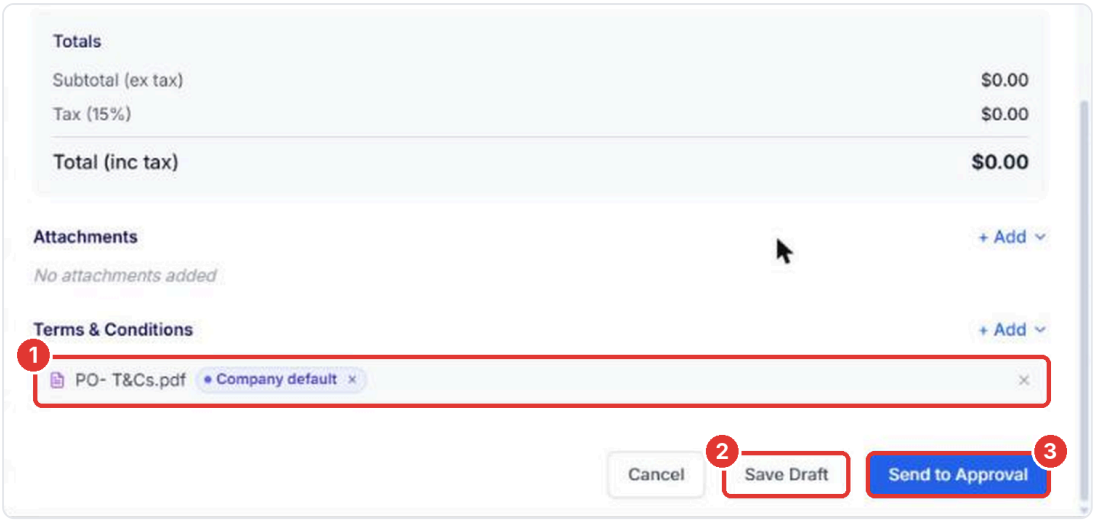


1. **Show all cost codes** adds codes that are not in this project's budget.
2. Revised budget and Remaining for each code, so you can see the headroom before you commit.
3. A code with nothing remaining. You can still use it, but the PO will take that code over budget.

Use **Add Line Item** for more lines. **Totals** update as you go.

STEP 4

Attach, then save or send for approval



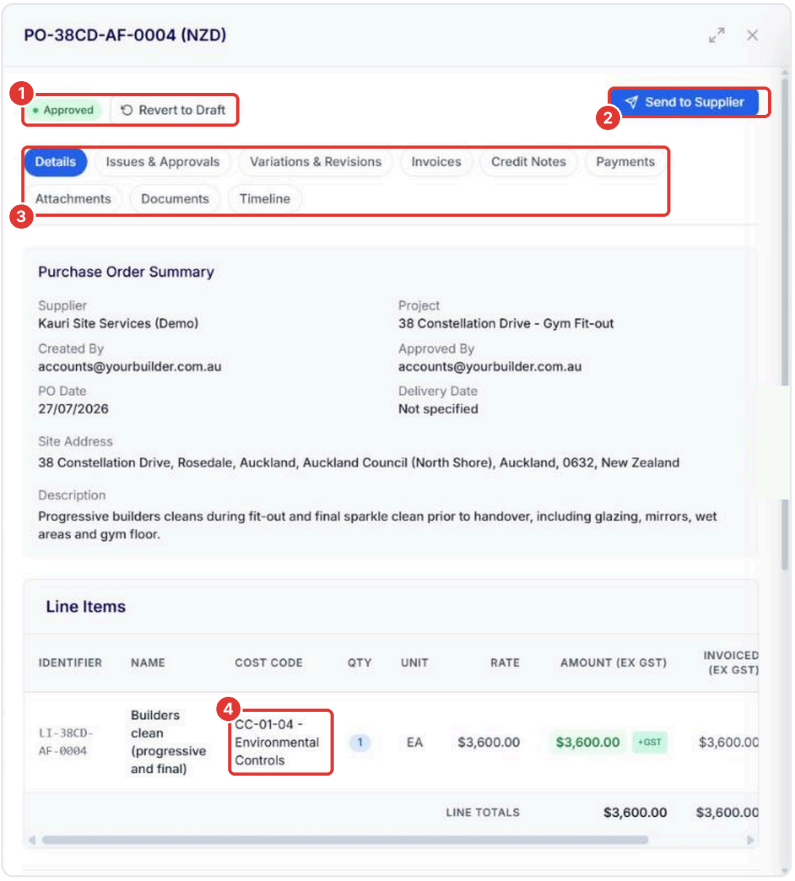
1. **Terms & Conditions**. A **Company default** badge means your standard T&Cs were attached automatically. You can remove them from this PO or **+ Add** others.
2. **Save Draft** keeps the PO as a draft you can keep editing.
3. **Send to Approval** saves it and starts your approval route.

Who approves? The route comes from your Delegation of Authority, based on the PO's value. If your workspace has *auto-approve within the submitter's authority* turned on and the PO is inside your own limit, it is approved straight away. See the *Delegation of Authority in Deep Space* guide.

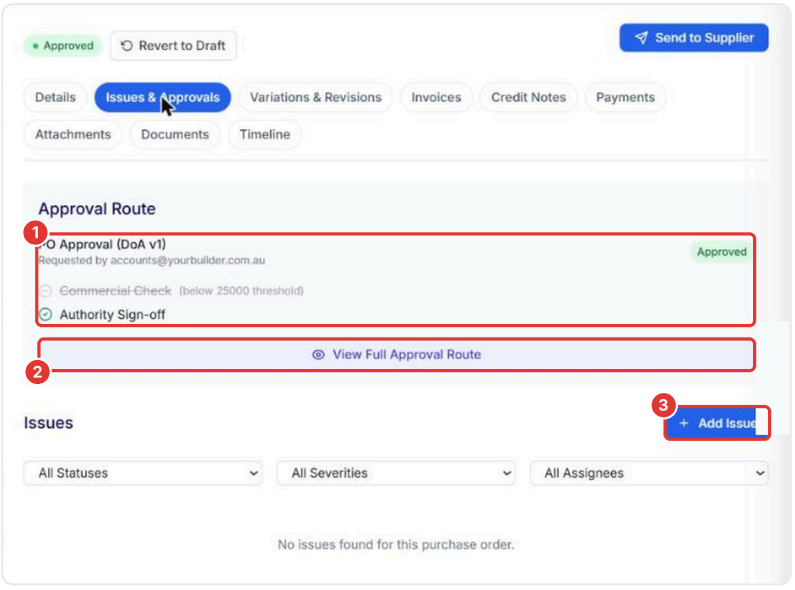
STEP 5

Track approval on the PO

Click a PO number to open it. The status sits at the top, with tabs for everything that happens to the PO.



1. Status, and **Revert to Draft**. Reverting cancels the open approval. An approved PO can only be reverted once its invoices are cleared.
2. **Send to Supplier** (step 6).
3. Tabs: **Details**, **Issues & Approvals**, **Variations & Revisions**, **Invoices**, **Credit Notes**, **Payments**, **Attachments**, **Documents** and **Timeline**.
4. Each line's cost code, quantity, unit, rate and amount, and how much has been invoiced against it.



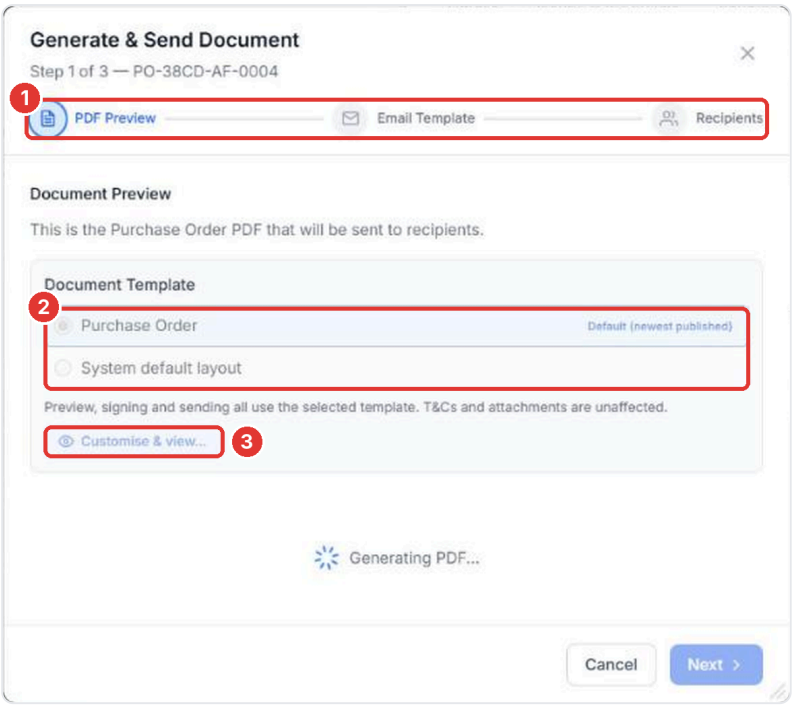
1. **Approval Route**: each step and its result. Steps that do not apply at this value are struck through.
2. **View Full Approval Route** shows who approved what and when.
3. **Add Issue** to raise a question or problem against the PO.

If an approver rejects the PO, it comes back to you to fix. Edit it and click **Send to Approval** again. The old approval request is closed automatically, so approvers only ever see the latest version.

STEP 6

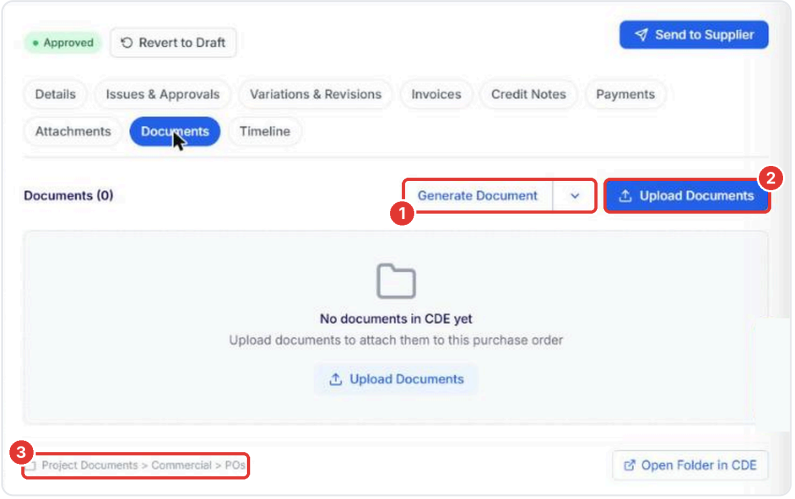
Send the PO to the supplier

Once it is approved, click **Send to Supplier**. **Generate & Send Document** walks you through three steps.



1. Three steps: **PDF Preview**, **Email Template** and **Recipients**.
2. **Document Template**: your company's **Purchase Order** template (its newest published version) or the **System default layout**. T&Cs and attachments are added whichever you choose.
3. **Customise & view** to check the PDF before it goes.

To produce the PDF without emailing it, use **Generate Document** on the **Documents** tab, or **Download as PDF** on the **Details** tab.

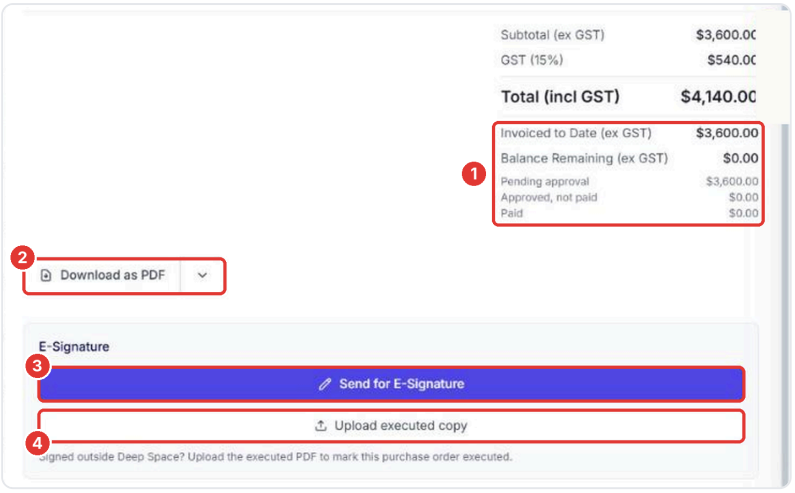


1. **Generate Document** creates the PO PDF from your template.
2. **Upload Documents** for quotes, drawings or other supporting files.
3. Files are saved in the project's documents under Commercial › POs.

Admins: set up your PO once. Your PO layout is a document template under **Admin › Document Templates**. Your standard T&Cs become a company default attachment when you tick *Set as default attachment for all POs* as you add them from Company Documents. Defaults always use the latest version of the file. See the *Document Templates* guide.

STEP 7

Record execution



1. The PO's running position: **Invoiced to Date**, **Balance Remaining**, and how much is pending approval, approved but not paid, and paid.
2. **Download as PDF**.
3. **Send for E-Signature** emails the supplier a signing link. If you need to void a signing request, you can send it again afterwards.
4. **Upload executed copy**: signed outside Deep Space? Upload the executed PDF to mark the PO executed.

5. After approval: invoices and the budget

- **Budget.** An approved PO counts in **Committed** on the Budget Register for each line's cost code. Drafts and POs waiting for approval do not.
- **Invoices.** Supplier invoices in the Invoice Register are matched to the PO, by KAI or by hand. KAI only auto-matches to approved POs and to the invoice supplier's own POs.
- **Unapproved PO.** You can link an invoice to a draft or pending PO, but it cannot be sent for authorisation or pushed to Xero until the PO is approved. The invoice shows **PO not approved**.
- **Overspend.** When an invoice would take a PO line past its remaining balance, the invoice is warned. At **Send for Authorisation** the overrun is refused, with the options to raise a PO variation or change the match. A PO cannot be overspent without an approved variation.
- **Price TBC.** A $0 PO is priced from the first supplier invoice authorised against it, through an automatically approved PO variation you can see under **Variations & Revisions**.
- **Invoice date rules.** Your workspace decides whether an invoice dated before its PO is blocked, warned or allowed (Company Settings › Commercial › Commercial Date Rules).

6. Tips

- **Check Remaining before you commit.** The cost code picker shows it. Spotting a code with nothing left now saves a budget transfer later.
- **Cancel, don't delete.** Only Draft POs can be deleted. Cancel an approved PO instead, so the history and its approval trail stay.
- **Use Price TBC for counter purchases** where the supplier needs an order number before the docket is priced.
- **Get suppliers to quote the PO number** on every invoice. It is the strongest signal KAI uses to match.
- **Use price lists** (Select Items) for regular suppliers, so rates and cost codes are filled in for you.

7. Troubleshooting

What you see	Likely cause	Fix
A cost code is missing from the picker	It is not in this project's budget.	Tick **Show all cost codes**, or add it to the budget first.
Remaining looks too low	Other POs or subcontracts on that code are already approved.	Check the code on the Budget Register. Remaining refreshes each time the form opens.
Can't download, send or sign the PDF	Required Company Settings (legal name, ABN or NZBN, address) are blank.	Ask an Admin to complete Company Settings.
No delete option on a PO	Only Draft POs can be deleted.	Cancel it instead, or Revert to Draft first if nothing has been invoiced.
Can't revert an approved PO to draft	It has invoices against it.	Clear or re-match those invoices first.
An invoice against this PO can't be sent for authorisation	The PO is not approved yet, or the invoice would overspend a PO line.	Approve the PO, or raise a PO variation for the extra amount.
The approval is still waiting after I edited and resubmitted	You are looking at the new request. The previous one was closed automatically.	Check **Issues & Approvals** for the current route.

8. Related features

- **Invoice Inbox and Invoice Register**: matching and approving the invoices raised against your POs.
- **Delegation of Authority in Deep Space**: approval routes, thresholds and auto-approval.
- **Document Templates** and **Out-of-the-box Document Templates**: your PO layout.
- **Contract Templates**: standard attachments and T&Cs.

- **Showing Estimate Line Items on Budget**: linking estimate items through to PO lines.