






Entering Purchase Orders

A purchase order details the items to be purchased from a vendor, the quantity and price, freight and tax amounts, due date, and the buyer who processed the PO.

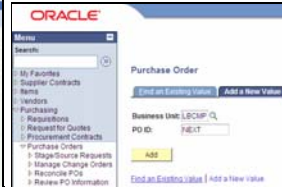
A Departmental Buyer PO can be changed before or after it is saved, but not after it is approved. All changes after approval require a Change Request to be sent to Purchasing for processing.

| | |
|---|---|
| Navigation | 1. Menu > Purchasing > Purchase Orders > Add/Update Purchase Orders > Add |
| Maintain Purchase Order Page | <ol style="list-style-type: none"> 1. Enter the Vendor and Buyer names (other fields will populate as you do these two) 2. To verify or change the default vendor address, click on 'Details' by the Vendor 3. Enter PO Ref (this is a field by which the PO can be searched) |
| Header Details Hyperlink | <ol style="list-style-type: none"> 1. Select correct Purchase Order Type (Default is General) 2. Verify the correct Origin which specifies the delivery point 3. Click OK to return to the Maintain Purchase Order page |
| Defaults Hyperlink | <ol style="list-style-type: none"> 1. Enter the following info: Due Date, Category, Unit of Measure 2. Verify the correct freight terms 3. Enter Chartfield info: Account, Fund, DeptID, and any other info as necessary 4. Click OK to return to the Maintain Purchase Order page |
| Maintain Purchase Order Page | <ol style="list-style-type: none"> 1. Enter the line Description, Quantity, and Price 2. Click on the plus (+) sign to add additional lines if needed 3. Click on the Line Details icon  to view details of the line in a different format |
| Line Receiving Tab | 1. Verify if Receiving is required – uncheck the box if the purchase will not be delivered to Shipping & Receiving. Do this for every line |
| Schedule Page | 1. Click on the Schedule icon  to verify the correct Due Date |
| Misc. Charges Icon | <ol style="list-style-type: none"> 1. Enter freight via the Miscellaneous Charges icon  on Line #1 on the Schedule page 2. Click on the plus (+) sign to add a line 3. Select the Charge Type of FRGT and enter the Flat Amount 4. Click OK to return to the Schedule page |
| Sales/Use Tax Icon | <ol style="list-style-type: none"> 1. For each line, add or remove tax via the Sales Tax icon  on the Schedule page 2. Click OK to return to the Schedule page |
| Distributions Icon | <ol style="list-style-type: none"> 1. Verify the Distribution and correct Chartfields for each line via the Distribution icon  on the Schedule page 2. Click OK to return to the Schedule page 3. Click on Return to Main Page |
| Add Comments or Edit Comments Hyperlink | <ol style="list-style-type: none"> 1. Click the Send to Vendor checkbox so the comments will print on the purchase order 2. Type in Comments or 3. Click on the Standard Comments Hyperlink, select the Std Type and the Comment ID. Click OK to return to the comment page with the comment. Only one comment at a time may be selected and each must be on a separate Comment line 4. Click OK to return to the Maintain Purchase Order page |
| Maintain PO Page | 1. Click the Save icon, then click on the green checkmark to Approve the PO. Save again |

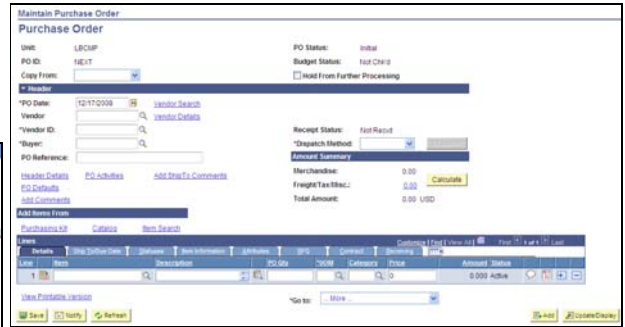
Navigation Path



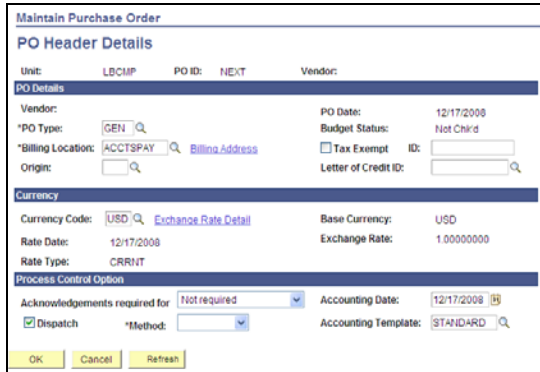
Add a New Value



Maintain Purchase Order



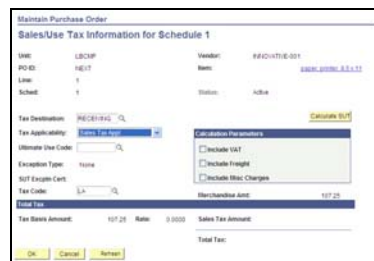
PO Header Details



Purchase Order Defaults



Sales/Use Tax



Misc. Charges (Freight)



Header Comments

