

PO.020.770 – ADDING/UDPATING AN EXPRESS PO

Purpose	<ul style="list-style-type: none"> • To create an Express Purchase Order. • To Identify the steps required to create an Express Purchase Order. <p>- Explain the benefit of Express Purchase Orders. - Explain the limitations of Express Purchase Orders. - Enter PO Defaults for an Express Purchase Order. - Create an Express Purchase Order.</p>
Description	<p>The Create an Express PO functionality allows a rapid-entry version of the Maintain Purchase Order page. The Express PO page allows users to view line, schedule, and distribution information consolidated on a single page.</p> <p>There are, however, a few limitations when purchase orders are created using express entry including the inability to distribute by amount, allocate header miscellaneous charges, and copy from an existing contract, requisition, or purchase order. If any of these actions are required, users will need to create the Purchase Order using the Maintain Purchase Order page.</p> <p>This topic demonstrates how to add and update an Express Purchase Order. The Express PO functionality provides a rapid-entry version of the Purchase Order page. This page enables users to view Lines, Schedules, and Distributions on a single page. However, Express Purchase Orders cannot distribute by Amount, allocate Header Miscellaneous charges, or copy from an existing Contract, Requisition, or Purchase Order.</p>
Security Role	BOR_PO_MAINTAIN
Dependencies/ Constraints	The purchase order will not be referencing a requisition, request for quote, or vendor contract.
Additional Information	None

Procedure

Below are step by step instructions on how to create an Express PO for a Conference-Organization fee for 50 attendees.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Add/Update Express POs link.
6.	Click the Add button.
7.	Enter or search for the supplier name in the Supplier field.
8.	Enter or search for the Supplier ID field. Note: this field will populate if you've identified the supplier in the Supplier field and tab out of it.
9.	Enter " EXPRESS PO " in the PO Reference field.
10.	Ensure the Dispatch Method is set appropriately.
11.	Enter " Conference Items " in the Description field.
12.	Enter " 50 " in the PO Qty field.
13.	Enter " PKG " in the UOM field.
14.	Click the Look up Category (Alt+5) button.
15.	Enter " CONFERENCE " in the Description field.
16.	Click the Look Up button.
17.	Click an entry in the Description column.
18.	Click the Expand Schedule Section button.
19.	You have the option of clicking the Expand All link to open the Lines, Schedules, and Distribution sections of the PO, however, in this example we are opening them individually.
20.	Enter " 04/30/2023 " in the Due Date field.
21.	Enter " 25.00 " in the Price field.
22.	Press [Tab] to see the Amount populate.
23.	Click the Expand Distribution Section button.
24.	Click the vertical scrollbar.
25.	Enter " 10000 " in the Look up Fund (Alt+5) field.

Step	Action
26.	Click the Collapse (Ctrl+Y) Menu button.
27.	Enter " UATDPT1 " in the Look up Dept (Alt+5) field.
28.	Enter " 16300 " in the Look up Program (Alt+5) field.
29.	Enter " 11000 " in the Look up Class (Alt+5) field.
30.	If this PO contained an asset, you would select the Asset Information tab to enter asset specific information.
31.	Click the Save button.
32.	Click the vertical scrollbar.
33.	<p>Notice that based on the Requester's user preferences, this purchase order was created in a Pending Approval PO Status.</p> <p>The PO will need to be approved prior to budget checking. Additionally, Budget Status must be Valid in order Dispatch this purchase order.</p>