PO.200-100 – Adding/Updating a PO Online

Purpose	• To identify the different statuses of a Purchase Order. • Explain the information contained in the Header, Lines, Schedule, and Distribution sections of Purchase Order pages. • Explain the purpose of PO Defaults, whether they override defaults set at the BU, Buyer, or Vendor, and whether they can be overridden on individual lines. • To create a Purchase Order by entering all required fields. • To enter PO Defaults. • To create a Purchase Order by copying an existing Purchase Order. • To create a Purchase Order by copying a Requisition
Description	This topic demonstrates how to create a Purchase Order online. Purchase Orders can be created in three ways – by starting with an entirely new Purchase Order, by copying an existing Purchase Order, or by copying an existing Requisition. This topic demonstrates all three methods. • The statuses of a Purchase Order are Initial, Open, Pending Approval, Approved, Dispatched, Canceled, and Complete. • Purchase Orders consist of a Header, Lines, Schedules, and Distributions. The Header section contains vendor information. The Line section contains information about the goods or service purchased. The Schedule section contains Ship To information. The Distribution section contains the accounting information. • Defaults can be created for the Lines, Schedules, and Distribution sections. These defaults override the defaults set at the Business Unit, Buyer, or Vendor levels, and also become the default when no information is entered in a field. PO Defaults page can be overridden at the line level. • Purchase Orders that have been entered manually remain in Initial status until a Buyer has been associated to the Purchase Order. Once a Buyer is identified, the Purchase Order is set to Open or Pending Approval status, depending on the Buyer’s defaults
Security Role	**BOR_PO_MAINTAIN**
Dependencies/ Constraints	None
Additional Information	None

Procedure

In this topic, you will create Purchase Orders using all three methods – by entering each field manually, by copying an existing Purchase Order, and by copying an existing Requisition.

When entering all the fields, you will create a Purchase Order for a desk costing $1200. When copying an existing PO, you will change the first line from “Chair” to “Blue Pens” and the second line from “Chair Mat” to “Dry Erase Markers”. You will also change several things on the PO Defaults page to create the new Purchase Order.

When copying an existing Requisition, you will change the line information from 10 to 12 pallets of sod at $165 per pallet. Even though this example only changes line information, it is possible to also change distribution and schedule information.

Step	Action
1.	Click the **Navigation** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Purchase Orders** link.
5.	Click the **Add/Update POs** link.
6.	Click the **Add** button.
7.	**Decision:** Please make a selection from the options listed below. • Add PO Proceed to Step 8 • Add PO by copying existing PO Proceed to Step 40 • Add PO by copying a Requisition Proceed to Step 92
8.	Click the **Look up Vendor ID (Alt+5)** button.
9.	Enter "**Office**" in the **Short Vendor Name** field.
10.	Click the **Look Up** button.
11.	Click an entry in the **Short Vendor Name** column.
12.	Please note that the PO Status changed from **Initial** to **Approved** once the Buyer was selected. The status for each individual purchase order entered may be different depending upon the Buyer's default settings. The PO Status is the status of the entire purchase order. Values include **Initial**, **Open**, **Pending Approval**, **Approved**, **Dispatched**, **Canceled**, and **Complete**.

Step	Action
13.	Select this checkbox to temporarily prevent further processing of the purchase order. The purchase order will not be eligible for approval, unapproval, cancelation, closure, or dispatch processing if this box is checked.
14.	Enter "**Office Furniture**" in the **PO Reference** field.
15.	Click the **Header Details** link.
16.	Click the **OK** button.
17.	Click the **PO Defaults** link.
18.	The **PO Defaults** page is used to override the defaults set at the business unit, buyer, or vendor level and set defaults when none exist. If you make changes or add values to the defaults on this page, when you exit the page, you are prompted with the Retrofit field changes to all existing PO line, schedule, and distribution page.
19.	Click the **Look up Category (Alt+5)** button.
20.	Enter "**furniture**" in the **Description** field.
21.	Click the **Look Up** button.
22.	Click an entry in the **Description** column.
23.	Enter "**EA**" in the **Unit of Measure** field.
24.	Click the **Choose a date (Alt+5)** button.
25.	Click the **15** link.
26.	The **Distributions** section will need to be populated with the appropriate Chartfields. It will also be necessary to ensure that the **Budget Date** is accurate and that the **Bud Ref** is populated with the correct year. Once this has been completed, Click the **OK** button.
27.	Enter "**Desk**" in the **Description** field.
28.	Enter "**1**" in the **PO Qty** field.
29.	Enter "**1200.00**" in the **Price** field.
30.	Click the **Schedule Details** button.
31.	Click the **Distributions/ ChartFields** button.
32.	The **Distribution** chartfields were setup on the **PO Defaults** page; however, by clicking the **Distributions/Chartfields** button, you can verify all information and make any changes if necessary.
33.	Verify that the Chartfields are correct and click the **OK** button.

Step	Action
34.	The **(+)** and **(-)** buttons are used to add additional lines to or delete lines from the purchase order.
35.	Click the **horizontal** scrollbar.
36.	Click the **Return to Main Page** link.
37.	Click the **Save** button.
38.	A **PO ID** number is assigned to a new purchase order upon clicking the **Save** button. In the event that a **PO ID** is not assigned, there would be an error message explaining why and/or requiring additional information be entered on the PO.
39.	**End of Adding/Updating a PO Online Procedure.** Remaining steps apply to other paths
40.	Click the **Copy From** list.
41.	Click the **Purchase Order** list item.
42.	Enter "**0000019423**" in the **PO ID** field.
43.	Click the **Search** button.
44.	Click the **Select** checkbox.
45.	Click the **OK** button.
46.	Please note the change in PO Status from **Initial** to **Approved** once the **Buyer** field was populated. The status may differ from one purchase order to another depending on the **Buyer** default settings. The **PO Status** is the status of the entire purchase order. Values include **Initial, Open, Pending Approved, Dispatched, Canceled, and Complete.**
47.	Enter "**Office supplies**" in the **PO Reference** field.
48.	Click the **Header Details** link.
49.	Click the **OK** button.
50.	Click the **PO Defaults** link.
51.	The **PO Defaults** page is used to override the defaults set at the business unit, buyer, or vendor level and set defaults when none exist. If you make changes or add values to the defaults on this page, when you exit the page, you are prompted with the **Retrofit** field changes to all existing PO line, schedule, and distribution page.
52.	Click the **Look up Category (Alt+5)** button.
53.	Enter "**office**" in the **Description** field.
54.	Click the **Look Up** button.

Step	Action
55.	Click an entry in the **Description** column.
56.	Click the **Look up Ship To (Alt+5)** button.
57.	Click an entry in the **Ship To Location** column.
58.	Click the **Choose a date (Alt+5)** button.
59.	Click the **31** link.
60.	Click the **Look up Unit of Measure (Alt+5)** button.
61.	Click an entry in the **Unit of Measure** column.
62.	This completes the entries for the **PO Defaults** page. Remember that this page is used to override the defaults set at the business unit, buyer, or vendor level and set defaults when none exist. If you make changes or add values to the defaults you just entered, when you exit the page, you will be prompted with the **Retrofit** field changes to all existing PO line, schedule, and distribution page. Let's see what this look like.
63.	Click the **OK** button.
64.	Click the **Select All** link.
65.	Click the **OK** button.
66.	Click the **OK** button.
67.	Enter "**Blue Pens**" in the **Description** field.
68.	Enter "**2**" in the **PO Qty** field.
69.	Enter "**5.00**" in the **Price** field.
70.	Press **[Tab]**.
71.	Enter "**Dry Erase Markers**" in the **Description** field.
72.	Enter "**7.00**" in the **Price** field.
73.	Press **[Tab]**.
74.	Click the **Schedule** button.
75.	Click the **horizontal** scrollbar.
76.	Click the **Distributions/ ChartFields** button.
77.	The **Distribution** chartfields were set up on the **PO Defaults** page. However, by clicking the **Distributions/Chartfields** button, you can verify all information and make any changes if necessary.
78.	Click the **horizontal** scrollbar.

Step	Action
79.	Click the **horizontal** scrollbar.
80.	Click the **horizontal** scrollbar.
81.	Click the **Show next row (Alt+.)** button.
82.	Click the **Distributions/ ChartFields** button.
83.	Click the **horizontal** scrollbar.
84.	Click the **horizontal** scrollbar.
85.	Click the **OK** button.
86.	The **(+)** and **(-)** buttons are used to add additional lines to or delete lines from the purchase order.
87.	Click the **horizontal** scrollbar.
88.	Click the **Return to Main Page** link.
89.	Click the **Save** button.
90.	A PO ID number is assigned to a new purchase order upon clicking the **Save** button. In the event that a PO ID is not assigned, there would be an error message explaining why and/or requiring additional information be entered on the PO.
91.	Congratulations. You have just completed the **Adding/Updating a PO Online** topic. Below is a summary of the key concepts of this topic: - The statuses of a Purchase Order are Initial, Open, Pending Approval, Approved, Dispatched, Canceled, and Complete. - Purchase Orders consist of a Header, Lines, Schedules, and Distributions. The Header section contains vendor information. The Line section contains information about the goods or service purchased. The Schedule section contains Ship To information. The Distribution section contains the accounting information. - PO Defaults can be created for an individual Purchase Order. These defaults override defaults set up at the Business Unit, Buyer, and Vendor levels. They also become the default when no information is entered in a field. - PO Defaults page can be overridden at the line level. - Purchase Orders that have been entered manually remain in Initial status until a Buyer has been associated to the Purchase Order. Once a Buyer is identified, the Purchase Order is set to Open or Pending Approval status, depending on the Buyer’s defaults. **End of Procedure.** Remaining steps apply to other paths.
92.	Click the **Look up Vendor ID (Alt+5)** button.
93.	Enter "**landscape**" in the **Short Vendor Name** field.

Step	Action
94.	Click the **Look Up** button.
95.	Click an entry in the **Short Vendor Name** column.
96.	Enter "**Sod order**" in the **PO Reference** field.
97.	Click the **Copy From** list.
98.	Click the **Requisition** list item.
99.	Click the **Search** button.
100.	Click the **Select** checkbox next to the line(s) you wish to copy into the PO.
101.	Click the **Copy To PO** button.
102.	Enter "**12 Pallets of Sod**" in the **Description** field.
103.	Enter "**12**" in the **PO Qty** field.
104.	Click the **UOM** button.
105.	Click on "**EA**" in the **UOM** list.
106.	Enter "**165.00**" in the **Price** field.
107.	Click the **horizontal** scrollbar.
108.	Click the **Save** button.
109.	In this scenario, only item information was changed; however, if changes are needed elsewhere on the document such as PO Defaults, Distribution Lines, etc., these changes can be performed and saved in the new purchase order.
	End of Procedure.