PO.020.110 – Adding/Updating an Express PO

Purpose	• To show the benefit of Express Purchase Orders. • To demonstrate limitations of Express Purchase Orders. • To enter PO Defaults for an Express Purchase Order. • To create an Express Purchase Order.
Description	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.
Security Role	**BOR_PO_MAINTAIN**
Dependencies/ Constraints	• The purchase order will not be referencing a requisition, request for quote, or vendor contract. • Express Purchase Order entry does not allow distribution by amount. • Express Purchase Order entry does not allow other documents to be copied in. • Express Purchase Order entry does not offer the ability to allocate header miscellaneous charges.
Additional Information	

Procedure
Below are step-by-step instructions on how to dispatch purchase orders via batch processing.

Step	Action
1.	Click the **NavBar** icon
2.	Click the **Menu** 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.	Click the **Look up Vendor ID (Alt+5)** button.
8.	Enter "**best**" in the **Short Vendor Name** field.
9.	Click the **Look Up** button.
10.	Click an entry in the **Name 1** column.
11.	Click the **Look up Buyer (Alt+5)** button.
12.	Click an entry in the **Buyer** column.
13.	Click the **OK** button.
14.	Enter "**Compact Discs**" in the **PO Reference** field.
15.	Click the **Expand All** link.
16.	Click the **PO Defaults** link.
17.	Click the **Look up Category (Alt+5)** button.
18.	Enter "**comp**" in the **Description** field.
19.	Click the **Look Up** button.
20.	Click an entry in the **Description** column.
21.	Click the **Look up Ship To (Alt+5)** button.
22.	Click an entry in the **Ship To Location** column.
23.	Click the **Choose a date (Alt+5)** button.
24.	Click the **15** link.
25.	Click the **Look up Unit of Measure (Alt+5)** button.
26.	Click an entry in the **Unit of Measure** column.
27.	For this example, the Chartfields will be completed automatically; however, in a Production environment, the appropriate chartstring information (Account, Fund, Dept, Program, Class, Project) will need to be entered for each transaction.

Step	Action
28.	For this example, Enter "**2007**" in the **Bud Ref** field. In a production GeorgiaFirst production environment, the **Bud Ref** field will default in when the **Budget Date** field is populated.
29.	Click the **OK** button.
30.	Click the **OK** button.
31.	Enter "**Compact Discs - blank**" in the **Description** field.
32.	Enter "**2**" in the **PO Qty** field.
33.	Click the **Choose a date (Alt+5)** button.
34.	Click the **10** link.
35.	Enter "**2**" in the **PO Qty** field.
36.	Enter "**10.00**" in the **Price** field.
37.	Press **[Tab]**.
38.	Notice that after the **PO Qty** and **Price** fields were completed and the "Tab" action was performed, all other fields were populated with default settings established on the **PO Defaults** page.
39.	Click the **vertical** scrollbar.
40.	Click the **horizontal** scrollbar.
41.	Click the **Save** button.
42.	Click the **vertical** scrollbar to verify the PO was saved and view the PO ID number assigned.
43.	Note the new PO ID assigned.