Create a Purchase Order (PO)

Navigation: **Purchasing > Purchase Orders > Maintain Purchase Orders**

1. **'Add a New Value'** – Enter/Verify Business Unit (BU). Verify that the Purchase Order = Next. Click 'Add'.

2. Select a vendor. Click the details hyperlink to verify that there is a mailing address. Click OK.

3. Select a buyer.

4. Click the Defaults hyperlink. Enter all default information such as Ship To, Due Date, Category, UOM, and Distributions. Click OK.

5. Click Header Details hyperlink.

6. Verify PO Type (leave as GEN).

7. Enter a PO Ref. This will display when you inquire or do a search.

8. Verify the billing address.

9. Select the correct Origin.

10. Verify that the Tax Exempt ID is correct and selected.

11. Verify that the Hold From Further Processing topion is not selected.

12. Verify that the Dispatch option is selected.

13. Select method = Print.

14. Accounting Template = Standard

15. Acctg Date = Current Date.

16. Click OK.

17. Enter a Description of the item you are purchasing.

18. Enter the Quantity.

19. Enter the UOM if you did not enter it in the defaults. If you entered it in the defaults and it did not fill in, click the refresh button.

20. Enter the Category if you did not enter it in the defaults. If you entered it in the defaults and it did not fill in, click the refresh button.

21. Click the Schedule Tab.

22. Enter the Price.

23. Verify Ship to, Due Date, PO Qty and unit Price.

24. Click Refresh.

25. Click the Distribution hyperlink.

26. Verify defaulted values. Enter required values that did not default. GL Unit, Account, Oper Unit, Fund, DeptID, and Class are required fields.

27. Click OK.

28. Click the PO Form Tab

29. Click Save

30. Budget Check

31. Click Save

32. Approve PO Amount – Navigation: Purchasing **>** Purchase Orders > Dispatch Pos

33. Click Search

34. Click PO_Dispatch

35. Click the looking glass beside the PO ID, click your po.

36. Click the Run icon.

37. On the Process Scheduler Request page Verify the following:

    a. Server Name: PSNT
    b. Select PO Dispatch/Print

38. Click OK.

39. Click Report Manager Link.

40. Click Administration tab.

41. Click refresh until the run status changes to Success or Posted.

42. Click the View hyperlink.

43. Click the ???????_????.pdf hyperlink