Buyers Checklist
Create a Purchase Order (PO) by Copying a Requisition

Navigation: ***Purchasing* > *Purchase Orders* > *Add/Update POs***

1. **'Add a New Value'** – Enter/Verify Business Unit (BU). Verify that the PO ID = NEXT. Click 'Add'.

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

3. Select a buyer.

4. Click the 'Copy From' drop down box and select "Requisition." You will be transferred to the **Copy Purchase Order from Requisition** page.

5. Enter the Requisition ID or click the lookup icon next to the Requisition ID field and click the appropriate requisition. Click Search.

6. If the requisition has more than one line, you can select which ones to bring into the PO. Click Copy To PO. You will return to the Purchase Order main page.

7. ****NEW**:** Check to see if the requisition changed the 'Receiving Required' field. Change it if necessary to say "Receiving Optional."

8. Click the Schedule icon. Verify the Due Date, Ship To, PO Quantity, Price, and Amount.

9. Click the Distributions icon for each schedule. Verify Distribution Information.

10. Click OK. You will return to the PO Schedule Page.

11. Click Return to Main Page. Click Save.

12. Budget Check.

If the agency wishes to finalize the requisition while in the PO, there are two icons next to the Budget Check to "Finalize Document" and "Undo Finalize" the requisition. Finalize the requisition here only if it will not be used for any more purchase orders, by line or in total. Finalizing will keep the requisition from accidentally being used again and will remove any additional budgeted money from a pre-encumbrance status to an encumbered status. (This happens when the requisition is for a larger amount than the purchase order.)

13. Approve Amounts.

14. Dispatch PO.