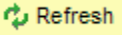


## **Buyers Checklist**

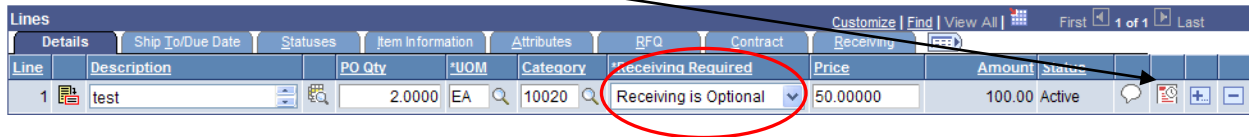
### **Create a Purchase Order (PO)**

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 by using [Vendor Search](#), where you can search by Name 1 or Short Name of the vendor. Click 'Search', then check the box that corresponds to the vendor you want. Click 'OK.'
3. Click on [Vendor Details](#) to verify the correct address. Use the look-up feature on the Location to find the correct one for your PO. Click OK.
4. Select a buyer.
5. Enter a PO Reference. This will display when you inquire or do a search.
6. Click the [Header Details](#) hyperlink.
7. Verify the billing location and address.
8. Verify that the correct Origin Code fills in. Click "OK."
9. Click the [PO Defaults](#) hyperlink. Verify that the "Override" button is selected under Default Options.
10. Enter all default information for the entire PO, such as Category, UOM, Ship To, and Due Date.
11. **Distributions:** You may use a SpeedChart here. Enter the accounting information that will apply to most of the schedule lines – this info can be changed later. Budget Date = Current Date.
12. Click OK.
13. **\*\*NEW\*\*:** The 'Receiving Required' field should automatically fill in as "**Receiving is Optional**." After you have customized your screens, this will become easier to see.
14. Enter a Description of the item you are purchasing.
15. Enter the Quantity, UOM, and Category if you did not enter them in the defaults. If you did enter one or all in the defaults but they did not fill in, click the 'Refresh' button.
16. If the category you selected is an inventory item, you will see that the Receiving Required field changed its value to "**Receiving is Required**." You must change this field back to say "Receiving is Optional." This step is new, but vital for closing POs.

17. Enter the Price. Click .

18. Click the Schedule Tab found here.



Line	Description	PO Qty	*UOM	Category	*Receiving Required	Price	Amount	Status
1	test	2.0000	EA	10020	Receiving is Optional	50.00000	100.00	Active

19. Verify the Due Date, Ship to, PO Qty, Unit Price, and Amount.

20. Click Refresh if you make any changes here.

21. Click the Distribution hyperlink found here.



Sched	*Due Date	*Ship To	*PO Qty	Price	Amount	Status
1	02/27/2008	110002	2.0000	10.00000	20.00	Active

22. Verify defaulted values. Enter required values that did not default: GL Unit, Account, Oper Unit, Fund, Dept, and Class are all required fields. Add additional lines as needed. Multi-SpeedCharts are able to be used now.

- a. Watch the account number in particular. Selecting a category used in Inventory may cause this field to automatically fill in as **888887**. You can use a speedchart to override it or simply change it to the correct account.

23. Click OK. Click [Return to Main Page](#).

24. Add any Line Comments by clicking the white callout oval on each line item.



Line	Description	PO Qty	*UOM	Category	*Receiving Required	Price	Amount	Status
1	test	2.0000	EA	10020	Receiving is Optional	50.00000	100.00	Active

25. Click Save.

26. Verify that the “Hold From Further Processing” option is **not** selected.

27. Budget Check . Click Save again.

## **Approval Stage**

28. Approve PO Amount – **Navigation:** *Purchasing > Purchase Orders > Approve Amounts*

29. Select Approval Action between Approve, Deny, or Recycle. Save. This action puts the PO into workflow for final approval, if needed.

## Dispatch/Print the PO

30. Navigation: *Purchasing* > *Purchase Orders* > *Dispatch POs*, 'Find an Existing Value.'
31. Click Search for the correct Run Control ID.
32. Click the looking glass beside the PO ID to select your PO, or use [Select Purchase Order](#).
33. Verify that "Test Dispatch" is not checked.
34. Click the Run icon.
35. On the Process Scheduler Request page verify the following:
  - a. Server Name: **leave blank**
  - b. Select PO Dispatch/Print
    1. Type = **Web**
    2. Format = **PDF**
36. Click OK.
37. Click [Process Monitor](#) link.
38. Verify that your user ID appears, and look for the Process Name [POPO005](#).
39. Click the 'Refresh' button until the run status changes to Success and the distribution status is Posted. Wait 30 seconds in between clicks of the refresh button!
40. Click the [Details](#) hyperlink, then the [View Log/Trace link](#).
41. Click the [PDF](#) hyperlink that begins with [POPO005](#). Print out copies of the PO to send to the vendor.

**NOTE:** If the Dispatch process does not work or the PO prints with an unauthorized signature, go back and check that:

- The PO is budget checked correctly. Review the distribution lines if necessary.
- "Test Dispatch" is not checked on the dispatch run control ID set up.
- If using batch dispatching, were the dates changed?
- Did the PO receive final approval?