CUSTOMIZATION OF PURCHASING SCREENS – FOR ALL BUYERS

Add/Update POs (Regular POs)

1. Find an existing PO for your agency with the status of Dispatched.

2. On the Details tab for Lines, click on the ‘Customize’ link shown here. (Your PO will have values in the fields.)

3. The following screen will appear:
4. Scroll down to the bottom of this page. Third from the bottom (approximately) you should see *Receiving Required. Click on that word to highlight it as shown below.

5. Now scroll back to the top of the page, being careful that *Receiving Required stays highlighted. In other words, don’t let the mouse touch any part of the page, only the scroll bar.

6. Continue clicking the ‘Move Up’ arrow to move the words to the place shown below, just below Category.

7. We are going to do the same thing with the icons for change orders ▲ and canceling line items ❌. **PLEASE NOTE:** These icons will not show up until the PO has been dispatched.

8. Click on the words **(column 34)** and **(column 35)** as shown on the next page. These names stand for the icons for change orders and canceling, normally found on the “Statuses’ tab. If you hold the shift key, you can highlight both of them.
9. Click the ‘Move Up’ arrow until they are just after \textbf{(column 20)}:
10. Click “OK” at the bottom of the page (scroll down).

11. You should be taken back to the Maintain Purchase Order page. See if your screen looks like this:

![PO Screen Example]

**OPTIONAL**: If your agency does not use Inventory, you might also want to hide the “Item” field. This field is used primarily for purchasing inventory items.

1. Highlight the word “Item”.

2. Click the box for “Hidden” as shown below.

**Personalize Column and Sort Order**

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

![Column and Sort Order Diagram]

3. Scroll down to click OK. That field should be gone from view now to give you more room for the new items you added to this line.

The screens for Express POs cannot be customized in this manner. Therefore it is very important that buyers using Express POs must check to make sure that it says **“Receiving is Optional”** under the Line Details for each item. This helps ensure that the PO can be closed properly.