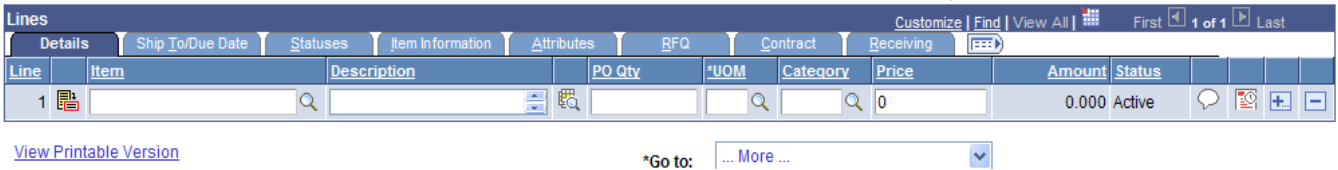


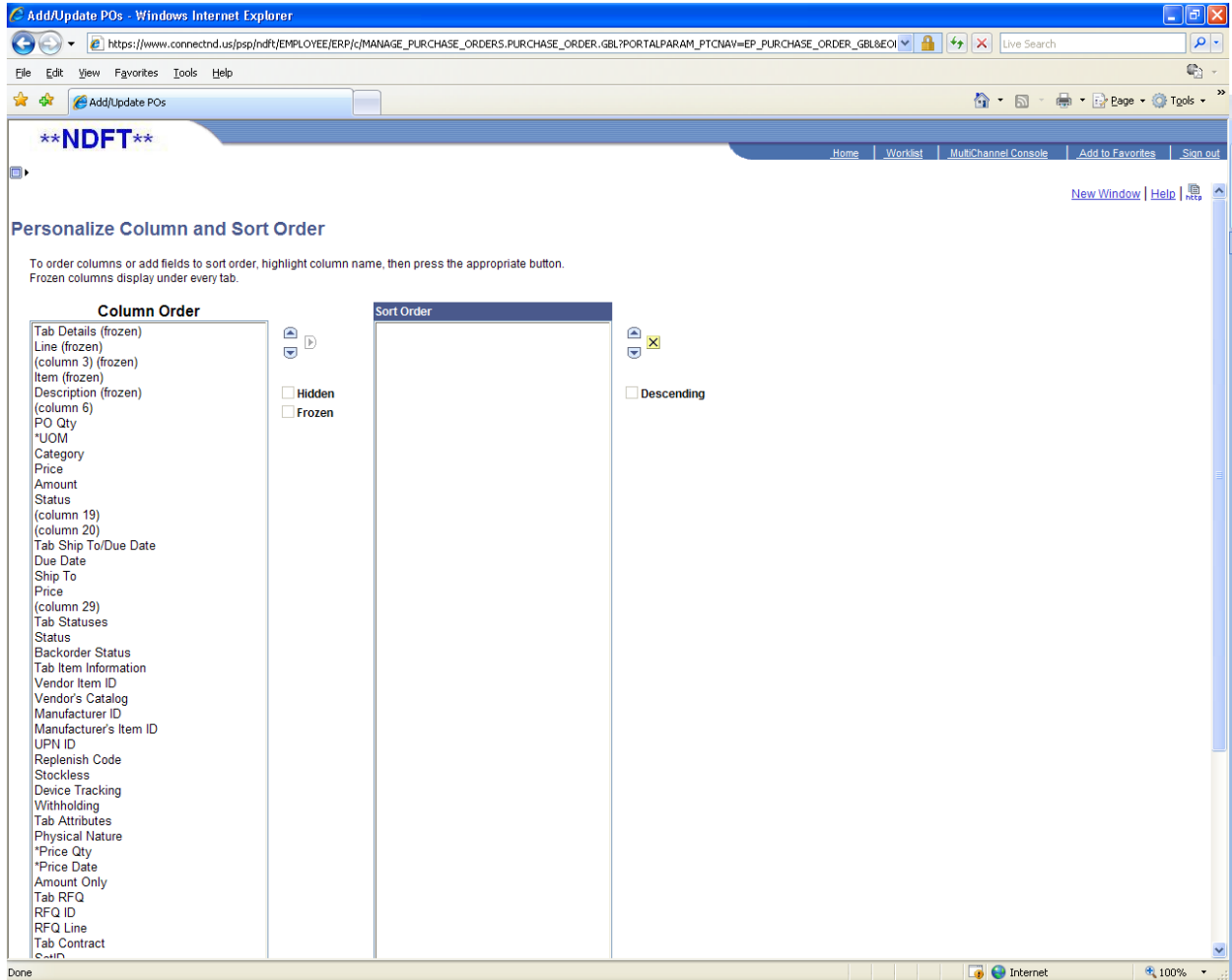
CUSTOMIZATION OF PURCHASING SCREENS – FOR ALL BUYERS

Add/Update POs (Regular POs)

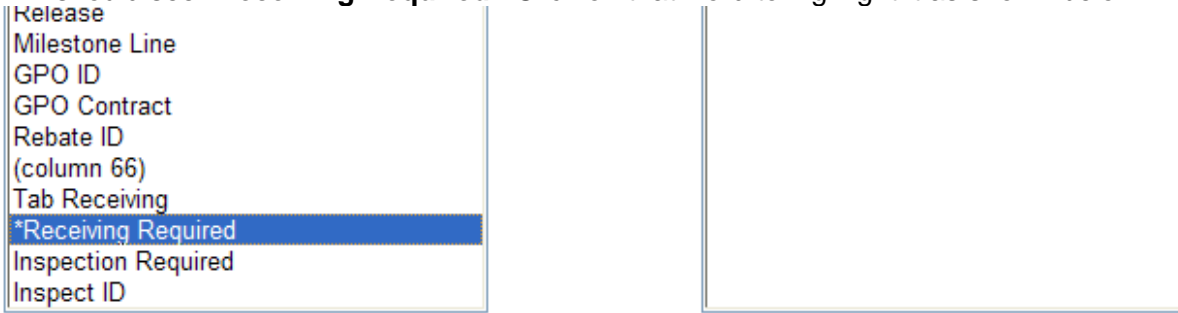
1. Find an existing PO for your agency with the status of **Dispatched**.
2. On the Details tab for Lines, click on the 'Customize' link shown here. (Your PO will have values in the fields.)



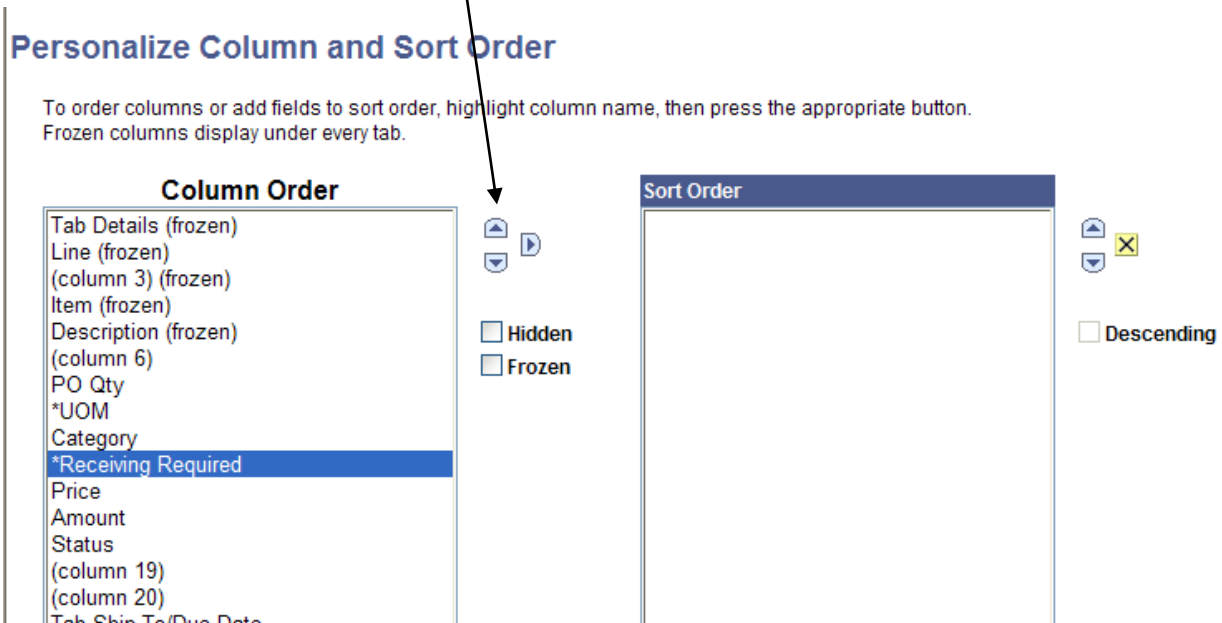
3. The following screen will appear:





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.

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 Order

Tab Details (frozen)

Line (frozen)
(column 3)

Item

Description
(column 6)

PO Qty

*UOM

Category

*Receiving Required

Price

Amount

Status
(column 19)

(column 20)

Tab Ship To/Due Date

Due Date

Ship To

Price
(column 29)

Tab Statuses

Status
(column 34)

(column 35)

Backorder Status

Tab Item Information

Hidden
 Frozen

Sort Order

Descending

- Click the 'Move Up' arrow until they are just after **(column 20)**:

Column Order

Tab Details (frozen)

Line (frozen)
(column 3)

Item

Description
(column 6)

PO Qty

*UOM

Category

*Receiving Required

Price

Amount

Status
(column 19)

(column 20)

(column 34)

(column 35)

Tab Ship To/Due Date

Due Date

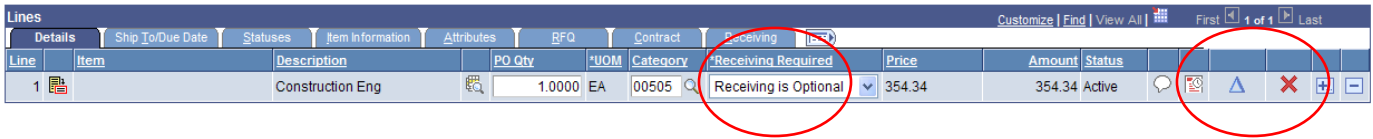
Ship To

Price
(column 29)

Tab Statuses

Hidden
 Frozen

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:

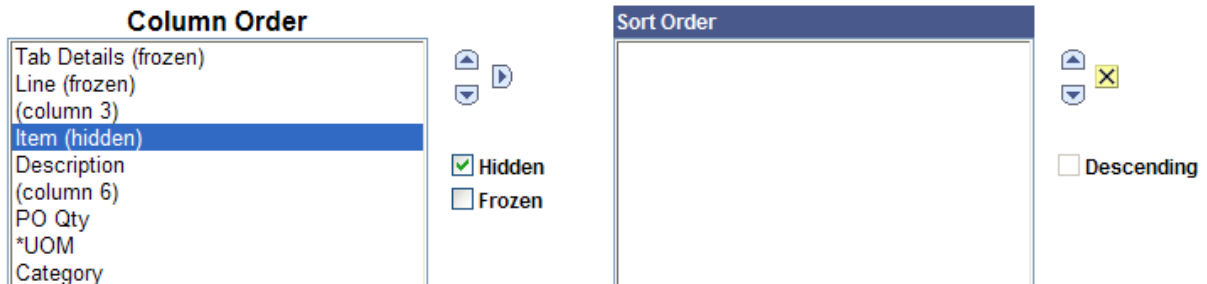


OPTIONAL: If your agency does not use Inventory, you might also want to hide the “Item” field. This field is used primarily for purchasing inventory items.

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.



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.