Buyers Checklist
Using Express POs

Buyers will need to decide which navigation to use to enter their purchase orders. The only differences between Regular POs and Express POs are:

<u>Good</u>

- Express POs are quicker and easier to enter for simple POs with one line and one schedule.
- By clicking "Expand All," you can see the line, schedule and distribution all on one page.
- If you have problems finding budget check errors on a PO entered as a regular PO, pull it up under Express PO instead. When you 'Expand All', you can see all the distributions and find the errors more easily.

<u>Bad</u>

- You don't enter the price until you get to the schedule. This throws many users off.
- You have to go into an additional screen to correct the "Receiving is Optional" field. (See Step 15 below.)
- SpeedCharts can be used under PO Defaults, but not on the distribution lines themselves.
- Not good for POs with multiple lines and/or schedules – all the screens on one page get confusing then.

Navigation: **Purchasing > Purchase Orders > Add/Update Express 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 **<u>Vendor Search,</u>** 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 **<u>Vendor Details</u>** 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 **<u>Header Details</u>** hyperlink.

7. Verify the billing location and address. Verify that the correct Origin Code fills in. Click OK.

8. Click the **<u>PO Defaults</u>** hyperlink. Verify that the "Override" button is selected under Default Options.

9. Enter all default information for the entire PO, such as Category, UOM, Ship To, and Due Date.

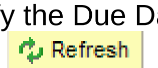
10. **Distributions**: This screen is the only place you may use a SpeedChart. Enter the accounting information that will apply to most of the schedule lines – this info can be changed later. Budget Date = Current Date. Click OK.

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

12. 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. <u>You cannot enter the price on this line.</u> That will come in Step 17.

13. ****NEW**:** Click the Line Details icon  to the left of the Item field.
    a. Click on the arrow next to Receiving to expand those fields.
    b. If the drop down box says "Receiving is Required" you must change it to "**Receiving is <u>Optional</u>**."
    c. Click "OK."

14. When you have returned to the Express Purchase Order page, click the **<u>Expand All</u>** hyperlink located below the Line Details icon. This will open up the Schedule and the Distribution information for Line 1.

15. Verify the Due Date, Ship to, and PO Qty under 'Schedules.' Enter the unit Price and click 

. Verify that the amount is accurate.

16. Verify the defaulted values under 'Distributions' and 'Chartfields.'
    a. Enter required values that did not default: GL Unit, Account, Oper Unit, Fund, Dept, and Class are all required fields.
    b. Add additional distribution lines as needed.
    c. Watch the account number in particular. Selecting a category used in Inventory may cause this field to automatically fill in as **888887.**

17. Click 

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18. You will not be able to add any Line Comments, just Header Comments and Ship To Comments.

19. Verify that the "Hold From Further Processing" option is **<u>not</u>** selected.

20. Budget Check . Click Save again.

Approval Stage

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

22. 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

23. Navigation: *Purchasing* **>** *Purchase Orders* > *Dispatch POs,* 'Find an Existing Value.'

24. Click Search for the correct Run Control ID.

25. Click the looking glass beside the PO ID to select your PO, or use Select Purchase Order.

26. Verify that "Test Dispatch" is not checked.

27. Click the Run icon.

28. 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**

29. Click OK.

30. Click Process Monitor link.

31. Verify that your user ID appears, and look for the Process Name POPO005.

32. 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!

33. Click the Details hyperlink, then the View Log/Trace link.

34. 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?