Buyers Checklist
Create a Purchase Order Template

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

1. **'Add a New Value'** – Enter/Verify Business Unit (BU).

2. **Before clicking "Add,"** delete the value of "NEXT" in the PO ID field and enter the name of your template here.

3. Now click 'Add'.

4. Enter a vendor for a specific template, or just pick one to fill the field – the template will not save without one. The vendor can be changed in any PO copied from your Template.

5. Click on Vendor Details to verify the correct address, if necessary.

6. Select a Buyer.

7. Enter a PO Reference that includes the word "template" in it. This will display when you inquire or do a search.

8. Check the 'Hold From Further Processing' box right below the Budget Status.

9. Click the Header Details hyperlink.

10. Verify that the correct Origin Code fills in.

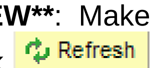
11. Click the PO Defaults hyperlink. Verify that the "Override" button is selected under Default Options.

12. You may want to enter the default distribution information or Ship To location here.

13. Click OK.

14. Enter a Description of "XXXXXXX."

15. Enter the Quantity, UOM, and Category; you may use the following default values:
    a. Quantity = 1.0000
    b. UOM = EA
    c. Category = 00505 (or any other)
    d. Price = 1.00000

16. ****NEW****: Make sure the Receiving Required field says "**Receiving is Optional**."
    Click 

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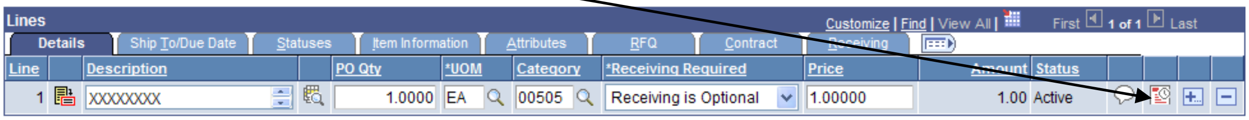
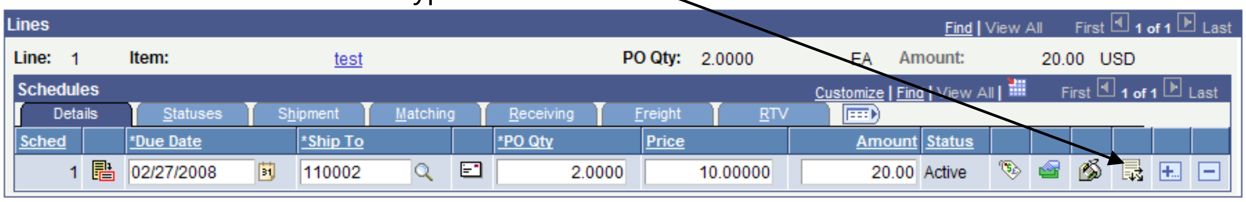
17. Click the Schedule Tab found here.



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

19. Click Refresh if you make any changes here.

20. Click the Distribution hyperlink found here.



21. 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. Watch for the invalid account number of 888887 – that will need to be changed.

22. Click OK. Click Return to Main Page.

23. Click Save. DO NOT BUDGET CHECK. Do not approve.

Creating a PO from a Template

Use this template to enter any quick POs by using the 'Copy From' drop down box when adding a new PO.

1. Select 'Purchase Order' in the drop down box.

2. You will be taken to the **Copy Purchase Order from Purchase Order** page.

3. Enter the name of your template under PO ID or search by the PO reference line.

4. Click Search.

5. Check the template you wish to use and click OK.

6. Make any changes necessary to create your new purchase order and proceed as with any other PO.