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Purchase Order Entry

Daily > Purchase Order Entry

Video Tutorial

Click the play button below for a video tutorial. This tutorial is about 9 minutes long. Written instructions are below the video.

NOTE: *If viewing from the right-side screen, to open the video on a larger screen, use the "Open in full site" link at the bottom left of the help display. If you are already viewing from the full site, click the play button below to begin the tutorial.*

Your browser does not support HTML5 video.

Step-by-Step Instructions

To browse or edit a purchase order, go to **Purchase Order Lists** and double-click on a purchase order.

Top Line Buttons

Save: This adds the purchase order and clears everything on the screen so that you can enter the next purchase order. If you are auditing a PO, this will save any changes that have been made and exit.

If Using Approvals:

- **Before Submission:**
  - **Submit:** Begins the approval process.
  - **Send to Reviewer (if activated in Approval Type setup):** This allows the PO to be assigned to a system user for review before clicking **Submit**. The reviewer may change all PO information according to the reviewer's approval options.
  - **Post:** If the user has **Post** permissions.
  - **Preview Approval Table:** The creating user can see the prospective approval table before submitting.
  - **Add Approvers (if activated in Approval Type setup):** Allows the creating user to add approvals to the PO’s approval table created by the system at Submit.
- **After Submission:**
  - **Post:** If the user has **Post** permissions.
  - **Approve:** Approves the PO and moves it to the next step in the workflow.

    - **Disapprove:**
        - **Disapprove:** This option disapproves the PO and returns it to the submitting user with the Disapprover's commentary (entered via a prompt).
        - **Disapprove and resubmit:** This disapproves the PO and opens it in edit mode for the Disapprover to make changes. The Disapprover is now the Reviewer and is considered the Submitting user when the PO is subsequently submitted for approval.
- **Log:** Displays all approval activity for the selected PO.
- **Approval Table:**
    - **Review approval table:** Displays the approval table for the selected PO with the current **Waiting on** user indicated.
    - **(Based on user permission):**
        - **Send email to current approver:** This opens an email dialogue, allowing the user to initiate an email. The commentary is appended to the original **waiting-for-approval** email and sent to the current waiting-on user.
        - **Approve for current approver and move to next approver:** Allows the current user to approve on behalf of the current waiting-on user and progresses the entry to the next step in the workflow.
        - **Change waiting-on user:** Moves the PO to another user's queue for approval.
        - **Insert new approver:** This option allows the user to add a user to the workflow anywhere in the list after the current waiting-on user.

Clone (submenu dropdown):

- **Clone:** Clones a prior PO, creating a new one with the same information.
    - Everything about the PO, except the accounting period, date, requested by, received status, and attachments, is cloned.
        - Select a vendor on the PO entry screen and click Clone to play all POs for that vendor.
        - If a vendor is not selected, clicking the Clone button will play all POs in the order of the PO number. You may filter the status of displayed POs.
        - Double-click to select the PO to be cloned. Anything may be changed (amounts, accounts, comments, etc.), as well as lines deleted or new lines added.
        - The user's PO Approval Group and account restrictions apply before the PO can be saved or submitted.
- **Clone Distributions Only:** This appends or replaces the distribution lines from the PO selected from the following dialogue window with the GL distribution grid for the current PO.

Post: This feature permanently posts the purchase order (PO) for invoice entry. It requires system

permissions to be visible. A PO cannot be deleted once it has been posted. If it is posted and you must delete it, you lose the PO instead.

Attachments: Documents attached to the purchase order. All Microsoft-accepted file formats are permissible.

Links: User-created linkages to other system entries, screens, and/or custom URLs.

Forms:

- **Print:** Depending on the user's workstation settings, **the PO can be opened in the Select Printer** dialogue box and printed or generated as a PDF containing the PO information, vendor number, Bill-to, Ship-to, all identifying information, and GL distribution grid detail.
- **Preview:** This generates a PDF of the PO information, vendor number, Bill-to, Ship-to, all identifying information, and GL distribution grid detail.
- **Word Export:** This generates a Word document containing all PO information, vendor number, bill-to, and ship-to, as well as all identifying information and GL distribution grid details.
- **Email to Vendor:** If a default email address is set, this will email the vendor a copy of the PO in PDF form.

Audit: Allows users to search all audit records specific to a purchase order.

Show Image: Displays the attached documentation on the right half of the screen beside the PO entry information.

PO Header

GroupPO (when using PO approval): Every purchase order has an Approved Group/Table selected. The default is the last Approval Group selected by the user.

Requested by: The user or person requesting the purchase. This defaults to the user making the entry, though it can be changed.

Blanket PO: This can be checked as a notation for a blanket PO. This checkbox does not control anything in the system but is available as a column in Detail Report Writer.

Approved Documentation (if activated in system options): This indicates that the attachment is an original approved invoice and contains sufficient documentation for payment. You can run a report to get a list of only those with approved documentation.

Payment Card/Vendor: If payment is to be made to a different vendor, specify it here. See payment cards for more info.

Vendor ID: The vendor must be active. Click the vendor ID label to add a new vendor or access vendor maintenance. You can also select the vendor ID by typing in the Vendor name field or selecting the Vendor name from the dropdown.

Address ID: This specifies the address to which the check is mailed. To add a new mailing address on the fly, click the Vendor ID label to edit the vendor. Click **Save** and return to the

purchase order entry screen, where you may now select the appropriate remittance address.

Date: Records the date of the purchase order.

Approval Due Date (if using PO approval and activated in Approval Type settings): The date by which the PO is required to be fully approved.

Period: The accounting period is the month and year the purchase order is associated with. The period allows for reporting and budget comparison capabilities.

Transaction Code: When selected, the system will prompt you for the transaction code, amount, and comments. Then, when you click OK, the distributions will be populated according to the split.

Description: This is an optional description or comment for an entire purchase order. Anything entered here will be printed on the bottom of the purchase order. When browsing POs, if a description is specified, it will be displayed in the description column. If no description is specified, then the first comments on the PO will be shown instead.

Notes: This section can be used for inter-office notes regarding this PO. These notes will not be printed on the PO form.

Ship To: Where the purchase requisition should be shipped. This will default from the approval table chosen, but may be overridden.

Distributions

Item# (if activated in options): This is the purchase order's item number, which is optional. If the PO is not in the options, the option to show it is available.

Quantity/Unit Price/Amount: Number of items and the unit price. These will be multiplied together to give you the amount. You may enter a positive or negative number for the amount.

Account#: The G/L Account number to charge. You may key the account number or click the search button (or F4).

Object Type: If using object tracking, the object type chosen will limit the available object #s from which to choose.

Object#: If using object tracking, this is the object# to charge.

Comments: All comments entered here will be carried over to invoices associated with the PO.

Received POus: Flag P.O. items with a status to mark them as Received, Not Received, etc. These statuses are defined as *Setup > P.O. Received Statuses.*

Budget Remaining: Upon entry of the amount, the remaining budget will be displayed for the G/L account.

- **TPOprohibit a PO (or invoice) due to insufficient budget:**
- **SignOn > Permissions.** Select the application Accounts Payable. Click Options at the top of this window. The task is **Force Budget Amount in Invoice Entry for General Ledger**. Select Yes if you want not to allow the budget to be exceeded; select No to enable the budget

to be exceeded; or select Warn to warn that the budget will be exceeded but allow entry to continue.

- **To change option for all users:** Select a user, and the application Accounts Payable. Click Options at the top of this window. Select the appropriate Access Level. At the top of this screen, select “Clone selected to” and select All Users. Click the **Apply** button.
- **To change option for selected users:** Right-click on this task’s row and select Options for all Users. You may change the Access Level for selected users.

PO Detail MontPOYear: Each PO detail line has a month/year assigned, which can differ from line to line. This controls the month/year of encumbrance. An optional setting controls whether the month/year field is displayed on each PO detail line.

- *Settings > Purchase Order > Entry Options* include the period and date on each PO detail line.
- The month/year can be edited anytime if the user's permission for Purchase Order Entry is set to **Level 80—Modify Anything.**

NOTE: *The Detail ID and Sub ID numbers are assigned when a PO is posted. If browsing a POnon-posted PO, these columns will not be visible.*

For more information, see the purchase order setup and rules.

Browse Purchase Orders

To browse purchase orders during the approval process, click on *Daily > Purchase Order List.*

The menu option to browse a purchase order after it has been posted is *Records > Vendors > Purchase Orders*.