Raising a Purchase Order

The Header of the Purchase Order

1. Navigate to the Purchase Orders window to enter the details in the Purchase Order Header area of the screen. These details will be used for the entire order.

2. A number of fields will be automatically populated:
   - **PO, Rev** - The system will provide the purchase order number automatically when the document is saved.
   - **Created** - This date will default in automatically.
   - **Type** - Accept the system default of Standard Purchase Order.
   - **Buyer** - Your name will default into this field and cannot be changed.

3. **Supplier** – select the Supplier name from the List of Values.

4. **Ship-To, Bill-To** - use the List of Values to enter the ship-to and bill-to locations for this purchase order.

5. **Site -** use the List of Values to enter the site of the Supplier. The "Site" name links to the Supplier's address. If the supplier has only one site, the name will default into the Site field automatically.

6. **Description** - you may enter a description of this purchase order to assist when searching for this order using the Purchasing Summary screen (i.e., the screen to assist in finding purchase orders). This comment is for internal use only and does not print on the purchase order. You can use up to 240 characters.

7. **Status** – this field will update based on the stage of the order (e.g., Incomplete, Approved).

8. **Total** – the order's amount will automatically be calculated once the line(s) quantity and price are entered.

List of Values and the Wildcard

The System's wildcard character "**%**" will allow you to search on a list when only part of the information is known. Many variations are possible when searching for information in a list – several options follow:

- **To Open a complete list**   Open the list and enter "**%**" in the **Find** line to review the entire list.

- **To Open a list starting with "x"**   Open the list and enter the first [or several] character (s) of your search, followed by a "**%.**" Example**:** Supplier Name: type in "M%" to search for all suppliers that begin with "M," or type in "Hef%" to find all suppliers that begin with "Hef".

- **To open a list containing some characters**   Open a list and enter a part of the text that you are searching for. Example: Supplier Name: type in "%computer%" to search for all suppliers with the word "computer" in their title.

The Lines of the Purchase Order

Line Information

The system will automatically provide a line number when you click in it. For each line of your purchase order you must complete the following fields.

1. **Line type** :   select either Goods, Services (if choosing Services, always use *Services Qty*) from the List of Values.

2. **Item** field   If you require a **stock item**, select the item from your list of values or enter the item number if known (NB, this is a long list so enter a partial segment of the item code to restrict the search).

Enter either a partial value in here to shorten the list or a wildcard to see
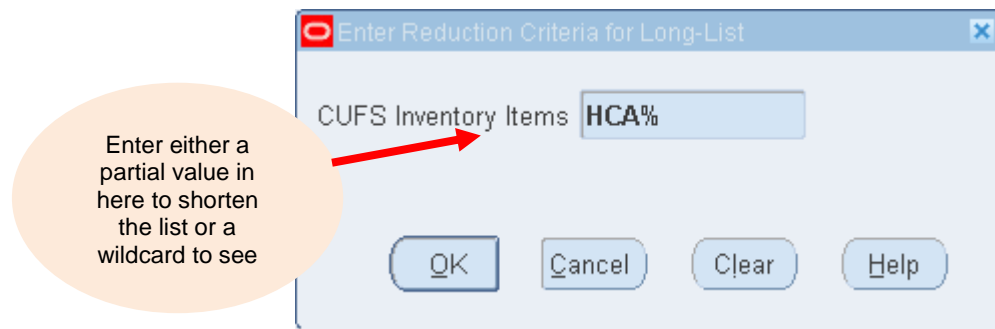
Once you have selected your Inventory item from the list it will automatically default information into some of the other fields such as category, description and unit of measure.

Alternatively, if you are ordering a **non-stock item** skip this field and go straight to the Category field.

3. **Description**   The item description will automatically display if you have entered an item number, if not enter a description of your choice.

4. **UOM**
   (Unit of
   Measure)
   The UOM qualifies the quantity you enter on the purchase order line. This will default in if you entered an item number, if not enter a UOM of your choice using the List of Values.

5. **Quantity**   Enter the total quantity you are ordering for this item on this purchase order line.

6. **Unit Price**   Enter the unit price for the item, net of VAT.

7. Click on **Shipments**

Other fields are optional but useful ones in this region include:

- The **need-by** date when the goods/services are required by.

- The **supplier's item number** – catalogue number, list part code, anything that is unique to the supplier and would aid them to identify the goods being ordered.

Item Codes:
Before you can raise a purchase order for a stock item, it must be set up centrally to be included on the master inventory list. The item will then be available for you to access from the list of values. If you have a new stock item to be added to the existing list, then please discuss this with your stores supervisor before contacting Central Accounting in the Finance Division

PO Distribution Lines

Distributions Window

The Distributions form is used to allocate costs for goods or services to different charge accounts. You can enter multiple charge accounts for each shipment line.

Use the Purchase Order Distributions window to enter distribution information for purchase order shipments and to view distributions that the UFS Purchasing module has automatically created for you. There are three alternative regions in the Distributions window: Destination, More, and Project.

Destination tab

1. The system will automatically enter the line number for the distribution.

2. The system will automatically enter the destination type of **Inventory** for the majority of orders as the goods are to be received into the inventory module upon delivery.

*The other destination type used is **Expense,** which relates to expense items that will not be received into the inventory module. An item can only be received into the inventory module if an Item code has been used.*

3. Use the **List of Values** to optionally enter the requestor's name and delivery location.

4. Enter sub-inventory of **ASSET** (you can do this by typing **ASSET** into the box and pressing the Tab key or selecting **ASSET** from the list of values)

5. The department's code for the purchase of stock items will default into the PO Charge Account field.

6. The system will automatically default the current date as the GL date.

Using the More tab

If your department uses numbered paper requisitions, then you can use the 'More' tab to enter the requisition number.