Adding a Line to a Non-Catalog Purchase Order

This process is only relevant to Non-Catalog orders. The addition of lines to a Non-Cat order should be rare, as if anything else is required from that supplier then a separate requisition should be raised.

Please do not add additional lines to any Marketplace order as this causes significant problems with suppliers that electronically submit their invoices to be paid.

Responsibility: iProcurement Buyer  
Navigate: Buyers Work Centre > Orders

1. Locate the order you wish to add a line to and ensure that you select the relevant order by clicking the corresponding radio button.

2. The Select Order field should show as Update. Click on Submit and the Update Standard Purchase Order window displays on the Header tab.

   Whilst on the header tab, check that the Supplier site is not ZMarketplace. If it is then the process of adding an additional line cannot be carried out. Click on Cancel and a new requisition will need to be raised for the additional line.

3. Click on the Lines tab to display the following screen.
4. Click on **Add 5 Rows** and complete the fields with the relevant information.

5. Click on the **Pencil** icon as additional fields require completion relating to deliver to, requester and coding information.

6. Complete/amend the following fields:
   - **Requester**: Enter the surname of the individual requesting the item, tab to display a list and **Quick Select the individual**.
   - **Deliver-To Location**: This should default in based upon the information entered in the Requester field.
   - **Need-By Date**
   - **PO Charge Account**: If coding to departmental funds enter the General Ledger code;
     or
   - **Project**: If coding the line to a Research Grant then complete all the fields.

7. Once the information has been entered, click on **Apply** and the lines screen will display.

8. It is important that you click on **Save** to finalise the changes that have been made.

9. Click **Submit** and the **Purchase Order Summary** screen will display. Check that the status is **Approved**. If it isn’t then you will need to forward the order for Approval again (refer to separate guidance on **Forwarding a Purchase Order for Approval**).

   If the order is still within your limit but the status is not displaying as **Approved**, then it is likely that the original order was raised in a previous financial month to when the re-approval is taking place. Therefore the **GL Date** needs amending. Refer to separate guidance on **Amending GL date for a previously approved order**.

10. Depending on your set up you may be required to re-print the latest version of the Purchase Order and either email or fax it to the supplier (Separate guidance notes are available).