

PO.020.070 – RESERVING PO IDs

Purpose	To reserve PO ID's.
Description	The Reserve PO ID functionality enables users to reserve a single Purchase Order number or multiple purchase order numbers, for a particular supplier. These numbers are reserved and applied to the purchase order(s) later when it is created.
Security Role	BOR_PO_MAINTAIN
Dependencies/ Constraints	None
Additional Information	When a single PO ID is reserved, it is assigned to a PO containing default information based on the User ID. This functionality is useful when an institution needs to provide a vendor with a PO number and there is no time to enter all the PO information in the system.

Procedure

Below are step by step instructions on how to reserve PO ID's.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Reserve PO IDs link.
6.	Verify the business unit defaults in the Business Unit field.
7.	Verify that ' NEXT ' appears in the PO ID field.
8.	Click the Add button. The system navigates to the Reserve PO IDs page.

Step	Action
9.	Enter the number of purchase order IDs to reserve by entering the total number into the Number of PO's field.
10.	Enter or search for the supplier in the Supplier field. The system will populate the Supplier ID and Supplier Location once this information is filled in.
11.	<p>Click the Save button. Verify the PO ID changes from 'NEXT' to a PO number. The reserved purchase order is created with a status of "Initial" and is immediately available for editing.</p> <p><i>Note: If a block of purchase orders is being reserved, the ID of the first Purchase Order in the sequence appears in the PO ID field and the range of PO numbers appear to the right of the Number of PO's field.</i></p>