

PO.020.110 – Adding/Updating an Express PO

Purpose	<ul style="list-style-type: none"> • To show the benefit of Express Purchase Orders. • To demonstrate limitations of Express Purchase Orders. • To enter PO Defaults for an Express Purchase Order. • To create an Express Purchase Order.
Description	<p>This topic demonstrates how to add and update an Express Purchase Order. The Express PO functionality provides a rapid-entry version of the Purchase Order page. This page enables users to view Lines, Schedules, and Distributions on a single page.</p> <p>However, Express Purchase Orders cannot distribute by Amount, allocate Header Miscellaneous charges, or copy from an existing Contract, Requisition, or Purchase Order.</p>
Security Role	BOR_PO_MAINTAIN
Dependencies/ Constraints	<ul style="list-style-type: none"> • The purchase order will not be referencing a requisition, request for quote, or vendor contract. • Express Purchase Order entry does not allow distribution by amount. • Express Purchase Order entry does not allow other documents to be copied in. • Express Purchase Order entry does not offer the ability to allocate header miscellaneous charges.
Additional Information	

Procedure

Below are step-by-step instructions on how to dispatch purchase orders via batch processing.

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 Add/Update Express POs link.
6.	Click the Add button.
7.	Click the Look up Vendor ID (Alt+5) button.
8.	Enter " best " in the Short Vendor Name field.
9.	Click the Look Up button.
10.	Click an entry in the Name 1 column.
11.	Click the Look up Buyer (Alt+5) button.
12.	Click an entry in the Buyer column.
13.	Click the OK button.
14.	Enter " Compact Discs " in the PO Reference field.
15.	Click the Expand All link.
16.	Click the PO Defaults link.
17.	Click the Look up Category (Alt+5) button.
18.	Enter " comp " in the Description field.
19.	Click the Look Up button.
20.	Click an entry in the Description column.
21.	Click the Look up Ship To (Alt+5) button.
22.	Click an entry in the Ship To Location column.
23.	Click the Choose a date (Alt+5) button.
24.	Click the 15 link.
25.	Click the Look up Unit of Measure (Alt+5) button.
26.	Click an entry in the Unit of Measure column.
27.	For this example, the Chartfields will be completed automatically; however, in a Production environment, the appropriate chartstring information (Account, Fund, Dept, Program, Class, Project) will need to be entered for each transaction.

Step	Action
28.	For this example, Enter " 2007 " in the Bud Ref field. In a production GeorgiaFirst production environment, the Bud Ref field will default in when the Budget Date field is populated.
29.	Click the OK button.
30.	Click the OK button.
31.	Enter " Compact Discs - blank " in the Description field.
32.	Enter " 2 " in the PO Qty field.
33.	Click the Choose a date (Alt+5) button.
34.	Click the 10 link.
35.	Enter " 2 " in the PO Qty field.
36.	Enter " 10.00 " in the Price field.
37.	Press [Tab] .
38.	Notice that after the PO Qty and Price fields were completed and the "Tab" action was performed, all other fields were populated with default settings established on the PO Defaults page.
39.	Click the vertical scrollbar.
40.	Click the horizontal scrollbar.
41.	Click the Save button.
42.	Click the vertical scrollbar to verify the PO was saved and view the PO ID number assigned.
43.	Note the new PO ID assigned.