Security Role	**BOR_PO_MAINTAIN**
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Concept

This topic demonstrates how to create a Purchase Order. When creating a purchase order you will need to determine if it should be designated as an Amount Only purchase order or left as a quantity purchase order.

Designating a PO as Amount Only means that the PO will be matched by amount, whereas a quantity PO will be matched by quantity.

Amount Only POs are typically going to be for intangible items like services or utilities.

Topic Objectives:
Upon completion of this topic, you will be able to:
- Enter a Purchase Order.
- Explain the difference between an Amount Only PO and a Quantity PO.
- Understand the purpose of the fields that are used to create a Purchase Order.

Assumptions
• User has been granted the appropriate security roles for the position • User has been granted the appropriate user preferences (see your local security admin for further details)

Additional Information:

Users may need to be granted additional security roles, dependent on their duties. Review the PO Security documentation found on the GeorgiaFIRST Financials website for additional information:

https://www.usg.edu/gafirst-fin/ > Documentation > Documentation Index > Security > Job Aids and Reference Documents > 9.2 Security Roles & User Preferences: ePro & Purchasing

Procedure

Step	Action
1.	From the **Navigator** menu, click the **Purchasing** link.
2.	Click the **Purchase Orders** link.
3.	Click the **Add/Update POs** link.
4.	On the **Add a New Value** tab, the **Business Unit** and **PO ID** field should be pre-populated. If they are not, enter your Business Unit in the Business Unit field, then enter **NEXT** into the PO ID field. Click the **Add** button.
5.	The **Copy From** option can be used to create a new PO by copying from a Requisition, Purchase Order or Contract. See **Business Process PO_020_120 – Creating a PO by Copyin a Requisition or PO_020_121 – Creating a PO from a Contract** for additional information.
6.	The **PO Date** field will default with today's date, but can be edited if desired.
7.	Enter the **Supplier** or **Supplier ID** in the **Supplier** or **Supplier ID** field to define the Supplier. You can also use the **Look up** button for either field if you are unsure of the supplier information.
8.	Enter the **Buyer** or click the **Look up Buyer** button in the **Buyer** field to select the Buyer.
9.	Enter desired information into the **PO Reference** field. This information will display on the printed PO.
10.	Click the **Header Details** link. The PO Type and Accounting Date are found here and can be updated if needed.
11.	Click the **PO Defaults** link. Here you can specify information that you want to populate on the Purchase Order.

Step	Action
12.	Click the **PO Activities** link. Here you can enter and track activities associated with a particular transaction. Keep the activity comments organized by logging the due date and by selecting the Done check box. This is an Optional step.
13.	Click the **Activity Summary** link. Here you can view the receiving, invoicing, matching activities that have been performed on the purchase order to date.
14.	Click the **Add Comments** link. Here you can enter comments and attachments for the Purchase Order.
15.	Click the **Add ShipTo Comments** link. Here you can enter ship to comments and attachments to the Purchase Order.
16.	Enter a **Description** of the item you are purchasing in the **Description** field.
17.	Enter the **PO Qty** in the **PO Qty** field. Note: If you mark the line as Amount Only the PO Qty will default to 1.
18.	Enter the **UOM** or click the **Look up UOM** button in the **UOM** field to select the UOM.
19.	Enter the **Category** or click the **Look up Category** button in the **Category** field to select the Category.
20.	Enter the **Price** in the **Price** field.
21.	Click on the **Ship To/Due Date** tab. Here you can enter a **Ship To** if one does not default.
22.	Click the **Attributes** tab. Here you can select the **Amount Only** checkbox, if the line should be designated as amount only.
23.	Click the **Contract** tab. Here you can search for and select a Contract ID if your institution is using the Procurement Contract functionality. See **Business Process PO_020_121 – Creating a PO from a Contract** for additional information.

Step	Action
24.	Click the **Receiving** tab. Here you will find the default receiving requirement for the line, as defined on the category code. This value can be changed, if necessary.
25.	To add line comments or attachments to the PO, click on the **Details** tab, then click on the **Comment** icon.
26.	Next, click on the **Schedule** icon (found between the comments icon and the add button on the right side of the page).
27.	On the **Details** tab the Due Date, Ship To, PO Qty, Price, and Merchandise Amount fields should all be populated.
28.	The **Statuses** and **Shipment** tabs can be skipped.
29.	Click on the Matching tab. This is where the Matching requirement is found for the line, in the Matching field. Options are: *Full Match:* Select to indicate that the system matches the line. *No Match:* Select to indicate that the system does not match the line. Note: ALL lines should have the same matching requirement. You should not have some lines with the requirement of Full Match and some lines with the requirement of No Match.
30.	The Freight and RTV tabs can be skipped.
31.	On the **Details** tab select the **Distributions/ ChartFields** icon (to the left of the plus icon) to open the Distributions for Schedule page.
32.	The **Distribute By** field drives how you allocate the expense account distribution (by amount or quantity). This can be left as it defaults on the page or can be changed if desired.
33.	On the **Chartfields** tab ensure the **GL Unit, Account, Fund, Dept, Program, Class, Bud Ref, & Project** fields are entered. Note: Not all fields will always be be populated. This is dependent on the chartstring you are using.

Step	Action
34.	If your institutions uses SpeedCharts, you can enter or search for a **SpeedChart**, if desired. The values defined on the speedchart will populate the chartfields. Note: Once you select the speedchart, the chartfields will populate, but the speedchart will not remain in the SpeedChart field. If the line needs to be distribute to more than one chartstring, you can use the **Multi-SpeedCharts** link.
35.	On the **Chartfields** tab ensure the **GL Unit, Account, Fund, Dept, Program, Class, Bud Ref, & Project** fields are correctly filled out.
36.	On the **Asset Information** tab enter the **AM Unit** and **Profile ID**, if the item is an asset.
37.	The **Req Detail** tab will only have information populated when a PO is sourced from a Requisition. See Business Process EP_020_760 – Expedite Requisitions for more information. If there is not a requisition, you can choose to populate the Attention To field – what is entered here will print on the Purchase Order.
38.	Click the **OK** button.
39.	Click the **Return to Main Page** link, found above the Lines box.
40.	Click the **Save** button.
41.	The **PO Number** will be assigned and the **PO Status** will update to Pending Approval.
42.	Congratulations. You have just completed the **Creating a Purchase Order** topic.