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PO.020.100 - Adding/Updating a PO Online

Trigger:

Concept

This topic demonstrates how to create a Purchase Order online. Purchase Orders can be created in three ways – by starting with an entirely new Purchase Order, by copying an existing Purchase Order, or by copying an existing Requisition. This topic demonstrates all three methods.

A Purchase Order can have several statuses during its life cycle - Initial, Open, Pending Approval, Approved, Dispatched, Canceled, and Complete. A Purchase Order entered manually can only have a status of Initial until a Buyer is specified. Once a Buyer has been specified, the status becomes either Open or Pending Approval, depending on the default set by the Buyer.

Purchase Order pages consist of Header, Line, Schedule, and Distribution sections. The Header identifies the vendor. The Lines identify the good or service being purchased. The Schedule identifies the Ship To information. The Distribution section identifies the accounting information. Defaults can be created for the Lines, Schedules, and Distribution sections. These defaults override the defaults set at the Business Unit, Buyer, or Vendor levels, and also become the default when no information is entered in a field.

Topic Objectives:

Upon completion of this topic, you will be able to:

- Identify the different statuses of a Purchase Order.
- Explain the information contained in the Header, Lines, Schedule, and Distribution sections of Purchase Order pages.
- Explain the purpose of PO Defaults, whether they override defaults set at the BU, Buyer, or Vendor, and whether they can be overridden on individual lines.

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- Create a Purchase Order by entering all required fields.
- Enter PO Defaults.
- Create a Purchase Order by copying an existing Purchase Order.
- Create a Purchase Order by copying a Requisition.

Assumptions

Dependencies/Constraints

Additional Information

Procedure

In this topic, you will create Purchase Orders using all three methods – by entering each field manually, by copying an existing Purchase Order, and by copying an existing Requisition.

When entering all the fields, you will create a Purchase Order for a desk costing \$1200. When copying an existing PO, you will change the first line from “Chair” to “Blue Pens” and the second line from “Chair Mat” to “Dry Erase Markers”. You will also change several things on the PO Defaults page to create the new Purchase Order.

When copying an existing Requisition, you will change the line information from 10 to 12 pallets of sod at \$165 per pallet. Even though this example only changes line information, it is possible to also change distribution and schedule information.

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