



## **Purchase Orders 101**

**State of Vermont**  
**Department of Finance & Management**  
**August - 2020**

## Revisions to Manual

### August 2020

- Added amount only information to additional PO exercises

### May 2019

- Added a step to match POs on amount only starting on page 24

### April 2019

- Manual finalized

### December 2018:

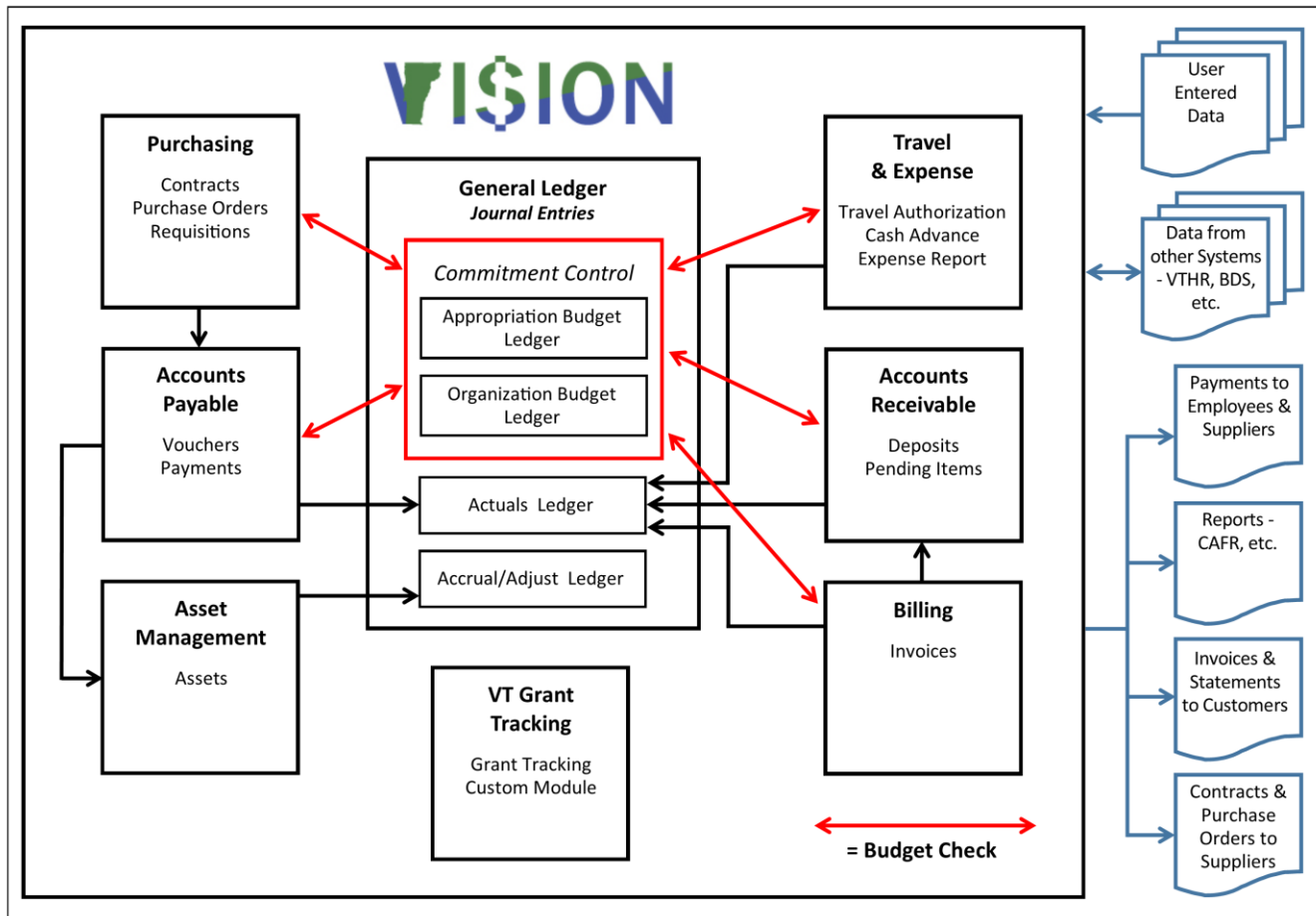
- Manual written

## Table of Contents

Revisions to Manual.....	2
Introduction to Purchase Orders.....	4
State of Vermont Required Fields for Entering a Purchase Order .....	6
Purchase Order Process Flow Chart .....	7
Frequently Asked Questions (FAQs).....	8
How to determine if a Commodity is on Contract.....	9
Enter a Purchase Order Against a Contract.....	11
Add Attachments to Purchase Order Header or Lines .....	26
Enter a Purchase Order against a Contract with Split Funding.....	32
Enter a Purchase Order Against an Expired Contract .....	42
Copy an Existing Purchase Order.....	46
Copy a Purchase Order from a Contract using every Contract Line .....	50
Enter an Express Purchase Order .....	56
Create a Change Order for a PO .....	60
Create a Change to a PO - Schedule .....	65
Create a Change to a PO - Distribution.....	70
Print a Dispatched Purchase Order .....	77
Print a Purchase Order for Authorized Signature.....	79
Dispatch and Print a Purchase Order from the Run Control Process.....	82
Reports & Queries.....	86

## Introduction to Purchase Orders

### Overview of VISION Financial System



The Purchasing Module is the entry point for purchase orders. There are four functions of a purchase order:

- Initiate a purchase with a supplier
- Track payments and usage against a statewide contract
- Track payments against a department specific personal services contract
- Serve as the control for encumbering funds as purchases and payments are executed

**Vision Procedure # 3** outlines the use of Purchase Orders, Contracts and BDA's (Blanket Delegation of Authority) in the State of Vermont's VISION financial system.

- A VISION Purchase Order must be prepared and charged to the appropriate VISION procurement contract when making payments in VISION on contracts for services and commodities, regardless of dollar amount in accordance with AOA Bulletin 3.5 (with the exception of Personal Service, Zero Dollar and some Financial Transaction contracts as defined by AOA Bulletin 3.5)

- All payments processed against a contract for service or commodities shall be coded using the appropriate expenditure accounts per the VISION Chart of Accounts
- Purchases made on contract by utilizing the State of Vermont Purchasing Card are exempt from requiring a Purchase Order. Authorized contracts for Purchasing Card utilization are defined in the State of Vermont Purchasing Card Policy

Visit the Finance and Management website at <http://finance.vermont.gov/policies-and-procedures/vision-procedures> to review VISION Procedure #3 in its entirety.

#### **Policy #1: Suspension and Debarment**

- The State of Vermont will not make purchases over \$25,000 or enter into grants or contractual agreements of any amount with vendors that have been suspended or debarred by the Federal government. This policy applies to all such purchases and agreements, regardless of funding source
- The Department of Buildings and General Services includes a Suspension and Debarment clause, similar to the above, in all contracts available for statewide use. Therefore, departments making purchases from statewide contracts do not have to verify suspension and debarment separately

Visit the Finance and Management website at <http://finance.vermont.gov/policies-and-procedures/vision-procedures> to review Policy # 1 in its entirety.

Additional Information on Purchase Orders and the Purchasing Process can be found in the following documents:

- Agency of Administration Bulletin 3.5 is located on the Finance and Management website under Policies and Procedures and at <http://aoa.vermont.gov/bulletins>
- [Buyer's Resource Guide](#) located on the Building's and General Services website under Purchasing and Contracting, Policies and Procedures

## State of Vermont Required Fields for Entering a Purchase Order

**NOTE:** *Departments may define additional required fields as needed for their own business processes.*

### Maintain Purchase Order Page

- **PO Date** (defaults as current date)
- **Supplier ID**
- **Buyer**
- **Item** (if applicable Item can be found in VISION) or
- **Description** (required if there is not an Item entered)
- **PO Qty**
- **Unit of Measure (UOM)**
- **Category**
- **Price**

### Header Details Link

- **PO Type** (defaults as GEN)
- **Billing Location**
- **Origin**
- **Accounting Date** (defaults as current date, accept default)

### If PO is drawing down a contract -Under Contract Tab

- **Contract ID**
- **Contract Line**

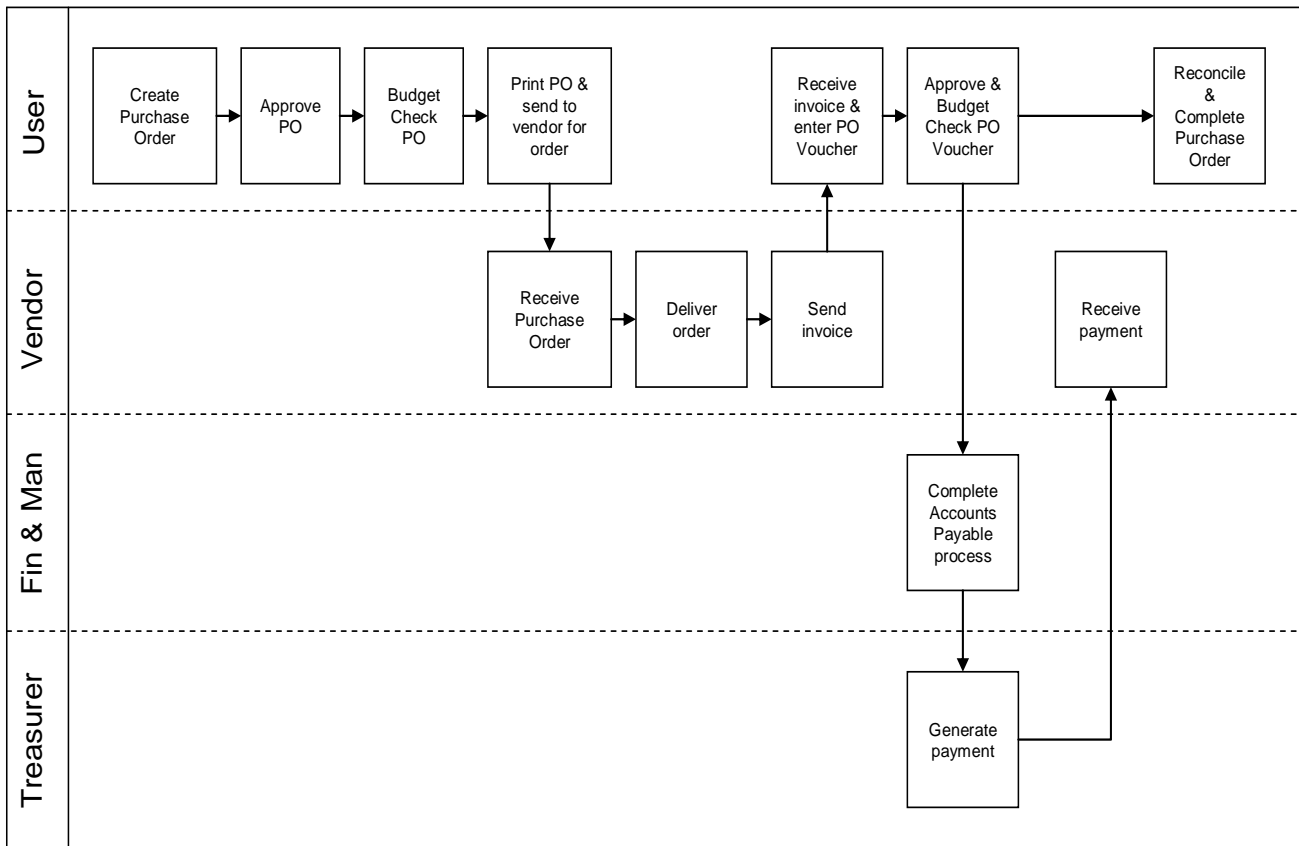
### Schedules Page

- **Due Date**
- **Ship To**
- **PO Qty** (defaults from main page)
- **Price** (defaults from main page)
- **Amount** (defaults from main page)

### Distributions for Schedule 1 Page

- **Account**
- **Fund**
- **Dept ID**

## Purchase Order Process Flow Chart



## Frequently Asked Questions (FAQs)

### **Why am I receiving an “Invalid Value” error message when I try to enter a PO against a valid contract?**

Typically, this happens because of a couple different reasons. In the contract Header page, check the begin and expire dates to confirm the contract is available for use. If the dates are valid, verify the contract is in Approved status. If the dates are fine and the contract is approved, contact VISION Support at 828-6700 option 2 for assistance or by email at [VISION.FinHelpdesk@vermont.gov](mailto:VISION.FinHelpdesk@vermont.gov).

### **Why aren't the PO Defaults that I put in my contract coming into my purchase order?**

PO Defaults set up on a contract will only come into the Purchase Order if the PO is copied from the Contract. If you enter the Contract number on the Contract tab of your PO, the default information will not come forward.

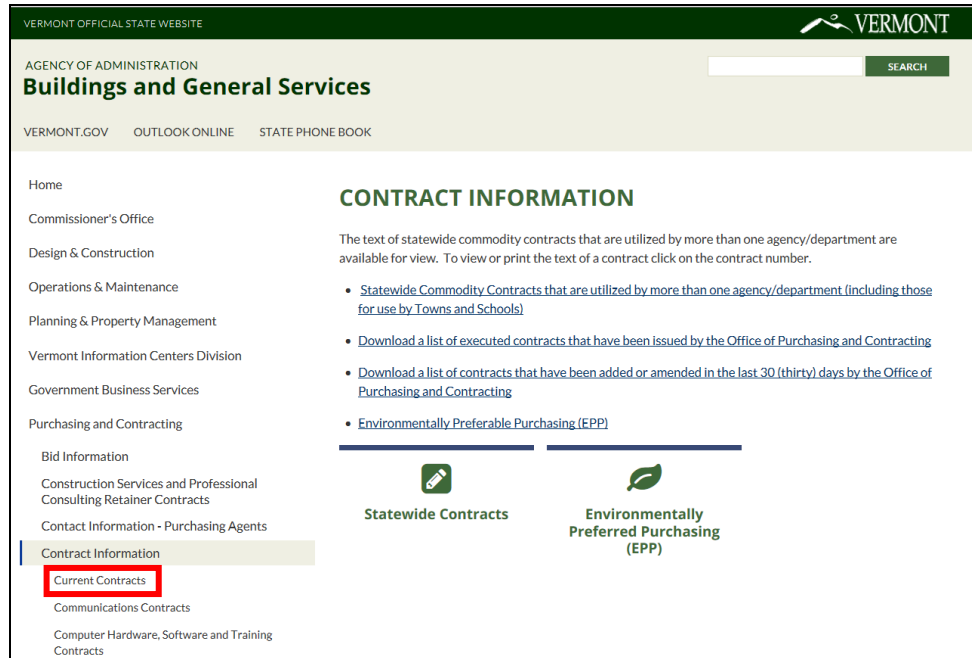
### **Why am I getting a gray box that says “Unauthorized” at the bottom of the page when I print my purchase order?**

Printing an Authorized Signature PO is done through Dispatch POs and not Review PO Information. See the Print a Purchase Order exercise in this manual for instructions. Also, be sure that the PO is approved.

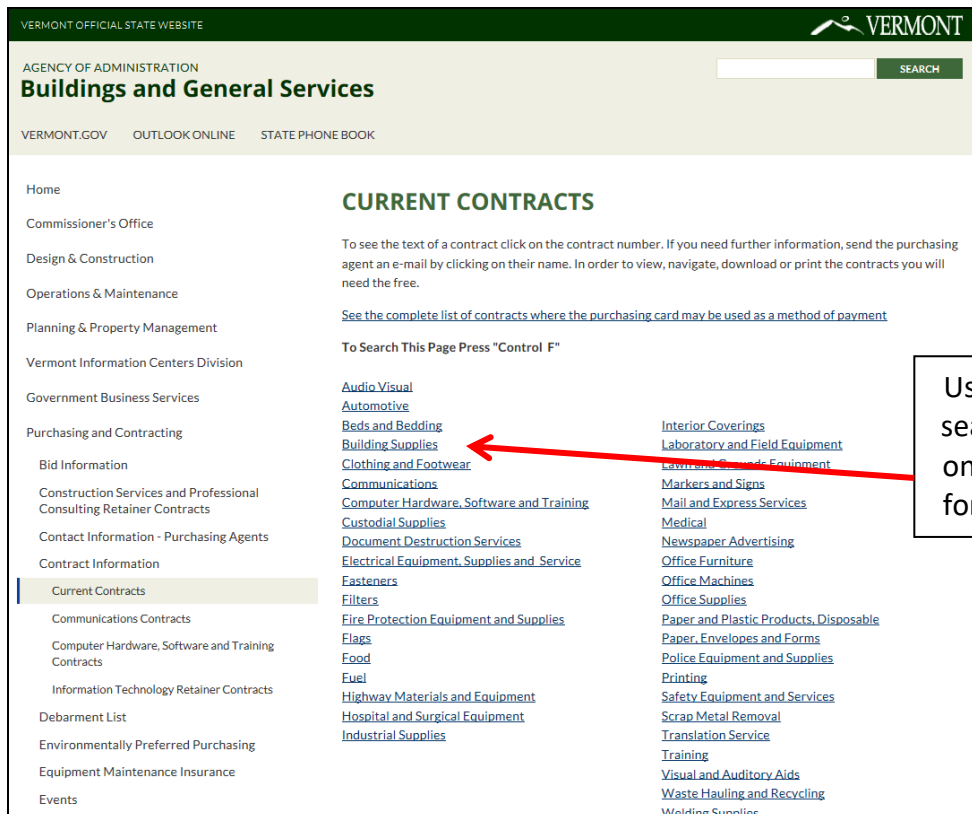


# How to determine if a Commodity is on Contract

Navigation: Go to the [Office of Purchasing and Contracting](#) website



Click on the [Current Contracts](#) link



### **Building Supplies**


- Lumber and Building Supplies
  - LaValley Building Supply Inc, Contract [34436](#)
  - Poulin Lumber, Contract [34441](#)
- Hardwood Plywood
  - Atlantic Plywood Corporation, Contract [36064](#)
- Plumbing and HVAC Supplies
  - Granite Group, Contract [30953](#)
  - F. W. Webb, Contract [31324](#)

### **Clothing and Footwear**

- Safety Shoes and Boots : Industrial Protection Product, Contract [33797](#)
- FPR Resale Shirts: Express Press, Contract [36507](#)
- Inmate Uniforms : Acme Supply Co Ltd, Contract [34128](#)
- Inmate Clothing : Bob Barker Company Inc., Contract [36206](#)
- Corrections Officer's Uniform : Ben's Uniforms, Inc., Contract [27564](#)
- Forestry Clothing: Initial Ideas, Contract [35154](#)
- Security Uniforms : Ben's Uniforms, Inc., Contract [29501](#)
- Shirts and Caps : Express Press, Contract [36747](#)
- Rough Duty Uniforms : Ben's Uniforms, Inc, Contract [36054](#)
- State Police Uniforms : Ben's Uniforms, Inc, Contract [34114](#)
- Uniform Rental & Cleaning: Unifirst, Contract [35508](#)
- Vermont Information Center Uniforms: Express Press, Contract [36760](#)
- High Visibility Safety Clothing: Applied Industrial Technologies Inc, Contract [35356](#)
- High Visibility Safety Clothing: Reflective Apparel Factory Inc., Contract [35354](#)

Click on the contract number hyperlink to view the contract

The **Contract** page opens displaying information regarding what items are on this contract:

State of Vermont		CONTRACT				
Buildings and General Services Office of Purchasing & Contracting 109 State St Montpelier VT 05609-3001 USA						
Vendor ID 0000009824 Ben's Uniforms Inc 20 Main Street Amesbury MA 01913 USA		Contract ID 000000000000000000029501		Page 1 of 7		
Phone #: 978-388-0471		Contract Dates 10/01/2015 to 09/30/2019		Origin CPS		
		Description: CPS - SECURITY UNIFORMS		Contract Maximum \$999,999.99		
		Buyer Name Deborah L LaRose		Buyer Phone 828-4635		
				Contract Status Approved		
Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt
1		SHIRT, SHORT SLEEVED	EA	56.00000	0.00	0.00
80/20 RAYON BLEND, 10 OZ., PLAIN WEAVE, TRADITIONAL 5-CREASE MILITARY STYLE, SEW-IN MILITARY STYLE CREASES, PLEATED POCKETS WITH SCALLOPED FLAPS, PENCIL SLOT LEFT AND HOOK-AND-LOOP CLOSURE, CONVERTIBLE SPORT COLLAR, EPAULETS, BADGE EYELETS WITH INTERNAL SUPPORT STRAP, EXTRA-LONG SHIRT TAILS, COLLAR PIN EYELETS IN COLLAR, MACHINE WASHABLE, COLOR: TAN OR WHITE.						
INDICATE MFR, PRODUCT CODE, COLOR AND SIZE OF SHIRT AT TIME ORDER						
BLAUER #8910 OR FLYING CROSS #W69W6604						
SIZE 14.5 - 17.5 - \$56.00/EACH						
SIZE 18 - 18.5 - \$60.00/EACH						
SIZE 19.5 - \$65.00/EACH						
2		SHIRT, LONG SLEEVED	EA	51.00000	0.00	0.00

**How to determine if a Commodity is on Contract is Complete**

## Enter a Purchase Order Against a Contract

**Situations when this function is used:** When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

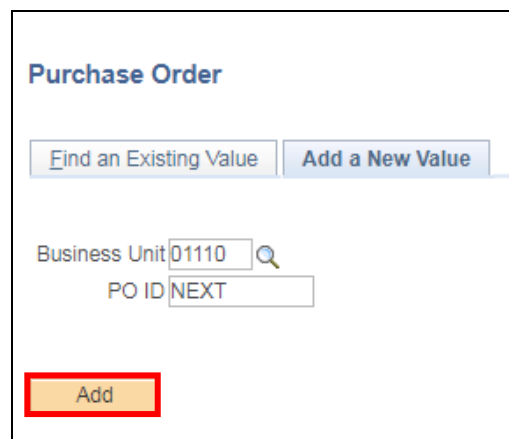
**Note:** *In this exercise we are demonstrating the best way to enter a purchase order against a contract that has multiple lines, but not all the contract lines are needed.*

Purchase Orders must be approved, have a valid budget check, and be dispatched to be used in a Voucher.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:

The screenshot shows a web form titled "Purchase Order". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these, there are two input fields. The first is labeled "Business Unit" and contains the text "01110" with a magnifying glass icon to its right. The second is labeled "PO ID" and contains the text "NEXT". At the bottom left of the form, there is a yellow button with the text "Add" inside it, which is highlighted with a red rectangular border.

1. Click **Add**

The **Maintain Purchase Order** page displays:

The following information defaults in: PO Status = Initial, Budget Status = Not Checked and PO Date = Current Date.

## 2. Supplier Short Name or Supplier ID# - Enter one or the other

If entering the number be sure to include all the leading zero's, click the Refresh button at the bottom of the page and Supplier name automatically populates **or** open a new window and use the Vendor pages for look up

The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract. To update the supplier address on the Purchase Order, Click the Supplier Search hyperlink to select a different address option

## 3. Click the **Supplier Details** link to update the Supplier Address number on the Purchase Order

The **PO Supplier Information** page displays:

4. Click on the **Magnifying Glass** to see the supplier addresses available and select an address

5. Click **OK**

6. **Buyer** - Enter the buyer, this field is case sensitive, so the name must be entered in UPPER case with the first initial of the first name followed by the first 7 letters of the last name and tab out of the field or click on the magnifying glass to select from a list of values

7. Click on the **PO Defaults** link

The **Purchase Order Defaults** window opens:

**Purchase Order Defaults**

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-001

**Default Options** ?

☒ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☐ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

**Line**

Category  Unit of Measure

**Schedule**

Ship To PFMTP002 FM Finance-Financial Oper Ultimate Use Code

Due Date  Original Promise Date

Ship Via BESTWAY Freight Terms Code FOBDEST

Arbitration  Freight Charge Method

\*Distribute By Quantity One Time Address

**Distribution**

SpeedChart

**Distributions** Personalize | Find | View All | First 1 of 1 Last

Chartfields Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1		01110	520000	10000	1110000000				

OK Cancel Refresh

8. Enter your chartstring information

9. Click **OK**

You are brought back to the **Maintain Purchase Order** page:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chkd

Copy From  Hold From Further Processing

**Header** ?

\*PO Date 11/02/2018 Supplier Search Doc Tol Status Valid

\*Supplier VCI/VOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

\*Buyer ETEST Eric John Hoefel

Receipt Status Not Recvd

\*Dispatch Method  Dispatch

PO Reference

**Amount Summary** ?

Merchandise 0.00

Freight/Tax/Misc. 0.00 Calculate

Total Amount 0.00 USD

**Add Items From** ?

Catalog Item Search Purchasing Kit

**Lines** ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ **Contract** Receiving

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1						0	0.00	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

10. Click on the **Contract** tab

**Lines** ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line
1			STATE				

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh

**11. Contract ID** - Enter the contract ID or click the Magnifying Glass to select from a list:

**Look Up Contract ID**

SetID STATE

Contract ID begins with

Short Supplier Name begins with

Description begins with

Look Up Clear Cancel Basic Lookup

**Search Results**

View 100 First 1-3 of 3 Last

Supplier Set ID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date	Expire Date
STATE	0000041408	00000000000000000000000034429	VC/VOWP-001	Approved	DMV MANUALS	08/01/2017	07/31/2019
STATE	0000041408	00000000000000000000000031144	VC/VOWP-001	Approved	CPS - STATIONARY & FORMS	03/31/2016	04/01/2019
STATE	0000041408	00000000000000000000000030918	VC/VOWP-001	Approved	CPS-HIGHWAY SIGNS AND ACCESS	03/01/2016	02/28/2019

**12. Click on the Contract ID link to select a contract**

**Note: The following must be true for a contract to be available to use:**

- The Contract must be in Approved Status
- The Contract Beginning date must be less than or equal to the PO Date
- The Contract Expire Date must be equal to or greater than the PO Date

If an invoice for a product or service is received after the contract has expired, but the order for the product or service was performed before the contract expiration date, you can and should use the contract. Please refer to the [Enter a Purchase Order against an Expired Contract](#) exercise in this manual.

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110 PO ID NEXT

Copy From

PO Status Open Budget Status Not Chkd Hold From Further Processing

Doc Tol Status Valid

\*PO Date 11/02/2018 Supplier Search

\*Supplier VC/VOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

\*Buyer ETEST Ella Test

PO Reference DMV MANUALS

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

Amount Summary

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Calculate

Add Items From Catalog Purchasing Kit Item Search

**Lines** ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line	Release	Milestone Line	GPO ID
1			STATE	00000000000000000000000034429	1					

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh

**13. Click the Magnifying Glass next to the Contract Line field to select the appropriate contract line**

The **Look Up Contract Line** window opens:

**Look Up Contract Line**

Help

SetID STATE

Contract ID 0000000000000000000000000034429

Contract Version 1

Category

Contract Line Nbr

More Information

[Basic Lookup](#)

**Search Results**

View 100 First 1-7 of 7 Last

Category	Contract Line Nbr	Item ID	More Information
69551	1	(blank)	IRP/IFTA MANUAL
69551	2	(blank)	CDL MANUAL
69551	3	(blank)	DRIVER'S LICENSE MANUAL
69551	4	(blank)	MOTORCYCLE MANUAL
69551	5	(blank)	SCHOOL BUS MANUAL
69551	6	(blank)	SNOWMOBILE MANUAL
69551	7	(blank)	ATV MANUAL

**14.** Select the contract line by clicking on the link

Once you select the contract line the following **Message** MAY appear on the screen:

Message

Override Schedule Quantity with Contract Quantity Scheduled on Line (1) with Description (IRP/IFTA MANUAL)? (10200,436)

Press OK to override schedule quantity with contract shipping template schedule quantity. Press Cancel to use the entered line quantity and schedule quantity.

**15. Click OK**

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

\*PO Date 11/02/2018

\*Supplier VCI/VOWP-001

\*Supplier ID 0000041408

\*Buyer ETEST

Supplier Search

Supplier Details

Vermont Correctional Industries/Vermont

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

\*Dispatch Method Print

Dispatch

PO Reference DMV MANUALS

Header Details

PO Defaults

PO Activities

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

Amount Summary

Merchandise 1,639.77

Freight/Tax/Misc. 0.00

Total Amount 1,639.77 USD

Calculate

Add Items From

Catalog

Item Search

Purchasing Kit

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

BFO

Contract

Receiving

Personalize | Find | View All | | | First | 1 of 1 | Last

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line			
1		IRP/IFTA MANUAL		STATE	0000000000000000000000034429	1				

View Printable Version

Close Short All Lines

\*Go to ... More

Save

Notify

Refresh

Add

Update/Display

**16.** Click the **+** icon to insert a new line to add an additional contract



The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

**17.** Change the number of rows to add if you want to add more than 1

**18. Click OK**

Additional line(s) are added to the PO:

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

☐ Hold From Further Processing

Header

\*PO Date 11/06/2018

\*Supplier VCI/VOWP-001

\*Supplier ID 0000041408

\*Buyer ETEST

Supplier Search

Supplier Details

Vermont Correctional Industries/Vermont

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

\*Dispatch Method Print

Dispatch

PO Reference CPS - STATIONARY & FORMS

Header Details

PO Defaults

PO Activities

Actions

Activity Summary

Add Comments

Add ShipTo Comments

Amount Summary

Merchandise	1,639.77	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	1,639.77	USD

Add Items From

Catalog

Purchasing Kit

Item Search

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line
1		IRP/IFTA MANUAL	STATE	000000000000000000000000034429	1	1	
2			STATE				

View Printable Version

Close Short All Lines

\*Go to ... More ...

Save

Notify

Refresh

**19.** Go through the process of entering the contract number and selecting the appropriate contract line number for each additional PO line.

Once all contract information has been entered,

**20.** Click on the **Details** tab

Maintain Purchase Order

### Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd  
Copy From  ☐ Hold From Further Processing

**Header** ?

\*PO Date 11/06/2018 Supplier Search  
\*Supplier VCI/VOWP-001 Supplier Details  
\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont  
\*Buyer ETEST Ella Test  
PO Reference CPS - STATIONARY & FORMS

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print Dispatch

**Amount Summary** ?

Merchandise	1,639.78	Calculate
Freight/Tax/Misc.	0.00	
<b>Total Amount</b>	1,639.78 USD	

**PO Defaults** (highlighted in red box)  
Activity Summary  
Add Comments  
Add ShipTo Comments  
PO Activities  
Actions

**Add Items From** ?  
Catalog Item Search  
Purchasing Kit

**Lines** ?

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	IRP/IFTA MANUAL		1.0000	T	69551	1,639.77000	1,639.77	Approved
2	000000000000004890	BUSINESS CARDS -	1.0000	LOT	69530	0.01000	0.01	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

21. If you want to apply the same chartstring information to all lines, click on the **PO Defaults** link. Otherwise, skip to step 25

The **Purchase Order Defaults** window opens:

Purchase Order Defaults

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-001

**Default Options** ?

☒ **Default** If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☐ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

**Line**

Category  Unit of Measure

**Schedule**

Ship To PFMTP002 FM Finance-Financial Oper Ultimate Use Code   
Due Date  Original Promise Date   
Ship Via BESTWAY Freight Terms Code FOBDEST  
Arbitration  Freight Charge Method   
\*Distribute By Quantity One Time Address

**Distribution**

SpeedChart

**Distributions** Personalize Find View All First 1 of 1 Last

**Chartfields** Asset Information

Dist	Percent	GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
1	100.0000	01110	520000	10000	1110000000				

**OK** (highlighted in red box) Cancel Refresh

22. Click **OK**

The **PO Default Retrofit** window opens:

PO Default Retrofit

Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.  
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.  
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.  
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Ship To	PFMMTP002	
<input type="checkbox"/>		Ship Via	BESTWAY	
<input type="checkbox"/>		Freight Terms Code	FOBDEST	
<input type="checkbox"/>		Pct	100	
<input type="checkbox"/>		GL Unit	01110	<input type="checkbox"/>
<input type="checkbox"/>		Account	520000	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Fund	10000	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Dept	1110000000	<input type="checkbox"/>
<input type="checkbox"/>		Budget Date	2019-02-08	<input type="checkbox"/>
<input type="checkbox"/>		Location	PFMMTP002	<input type="checkbox"/>

☒ Select All ☐ Clear All

OK Cancel Refresh

23. Select any fields you want to change or click on **Select All** to choose all fields

24. Click **OK** to override information that was brought in by the contract

You are returned to the **Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT Copy From

PO Status Open Budget Status Not Chkd Hold From Further Processing

Header

\*PO Date 11/06/2018 Supplier Search Doc Tot Status Valid

\*Supplier VCI/VOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

\*Buyer ETEST Ella Test

PO Reference CPS - STATIONARY & FORMS

Header Details Activity Summary

PO Details Add Comments

PO Activities Add Ship To Comments

Actions

Amount Summary

Merchandise	1,639.78
Freight/Tax/Misc.	0.00
Total Amount	1,639.78 USD

Calculate

Add Items From

Catalog Item Search

Purchasing Kit

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	IRP/IFTA MANUAL		1.0000	IT	69551	1,639.77000	1,639.77	Approved
2	000000000000004890	BUSINESS CARDS -	1.0000	LOT	69530	0.01000	0.01	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

25. Adjust the PO Qty & Price fields as appropriate to your situation and in compliance with the contract terms

26. Click **Refresh**

27. Click on the **Header Details** link

The **PO Header Details** page displays:

The screenshot shows the 'PO Header Details' form. It is divided into several sections: 'PO Details', 'Currency', and 'Process Control Option'. In the 'PO Details' section, 'Supplier' is 'VCIN/QWP-001', 'PO Date' is '11/06/2018', 'Budget Status' is 'Not Chk'd', and 'Tax Exempt' is unchecked. 'PO Type' is 'PROD' and 'Origin' is 'FM', both highlighted with red boxes. 'Billing Location' is 'PFMMTP0'. In the 'Currency' section, 'Currency Code' is 'USD', 'Base Currency' is 'USD', and 'Exchange Rate' is '1.00000000'. In the 'Process Control Option' section, 'Dispatch' is checked, 'Method' is 'Print', and 'Acknowledgements required for' is 'Not required'. At the bottom, 'Accounting Date' is '11/06/2018' and 'Accounting Template' is 'STANDARD'. The 'OK' button at the bottom left is also highlighted with a red box.

**28. PO Type** - Enter by clicking on the [Magnifying Glass](#)

**29. Origin** - Enter by clicking on the [Magnifying Glass](#)

**30. Click [OK](#)**

If you receive the following **Message**:

The screenshot shows a 'Message' dialog box with the following text: 'Custom price on line 1, schedule 1. Override with system calculated price? (10200,66)', 'The schedule is marked as having a custom price. The system has calculated a different price than the custom price.', and 'If you choose to not have the system override the custom price, you can see how the system calculated its price by viewing the Value Adjustments for the schedule. If at that time, you want to use the system's price, you can use the button on the value adjustments page to set the current price equal to the system-calculated price.' At the bottom, there are 'Yes' and 'No' buttons, both highlighted with red boxes.

**31. Click [Yes](#) or [No](#)** as it applies to the current situation (if you've changed the price on the PO – Click **No**, also this message will appear for each line on the PO)

You are returned to the **Purchase Order** page:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd

Copy From [ ] Hold From Further Processing

**Header**

\*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid

\*Supplier VCI/VOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont Receipt Status Not Recvd

\*Buyer ETEST Ella Test \*Dispatch Method Print Dispatch

PO Reference CPS - STATIONARY & FORMS

Header Details Add Comments

PO Defaults Add Ship to Comments

PO Activities

Actions

**Amount Summary**

Merchandise	1,644.77
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	<b>1,644.77 USD</b>

Calculate

**Add Items From**

Catalog Item Search

Purchasing Kit

**Lines**

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	IRP/IFTA MANUAL		1.0000	IT	69551	1,639.77000	1,639.77	Approved
2	000000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

32. Click on the **Add Comments** link to enter comments that relate to the Purchase Order as a whole

**Note: It is important to be specific about your delivery requirements as the items may be delivered by an independent company (Example: inside delivery is required to the 3<sup>rd</sup> floor, only accept deliveries on Tues & Thurs between 12-3, because of loading dock location deliveries cannot be accepted by anything larger than a box truck)**

The **PO Header Comments** page displays:

**PO Header Comments**

Business Unit 01110 PO ID NEXT Supplier VCI/VOWP-001

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

**Comments** Find View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate +

Send to Supplier Show at Receipt

Show at Voucher

**Associated Document**

Attachment Attach View Delete Email

From -> PO 01110-NEXT

OK Cancel Refresh

33. Click the **+** icon on the right side of the comments text box to add a new comment

PO Header Comments

Business Unit 01110 PO ID NEXT Supplier VCIVOWP-001

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

CONTRACT TERMS: THIS CONTRACT WILL BE SUBJECT TO REVIEW THROUGHOUT ITS TERM. THE STATE WILL CONSIDER CANCELLATION UPON DISCOVERY THAT A SUPPLIER IS IN VIOLATION OF ANY PORTION OF THE AGREEMENT, INCLUDING AN INABILITY BY THE SUPPLIER TO PROVIDE THE PRODUCTS, SUPPORT, AND/OR SERVICE OFFERED IN THEIR RESPONSE.

☒ Send to Supplier ☐ Show at Receipt

☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> PO 01110-NEXT

OK Cancel Refresh

34. Enter comments

35. Check the **Send to Supplier** checkbox. This allows the comments to show on the printed copy of the PO to send to the supplier

Once all comments have been entered,

36. Click **OK**

You are returned to the **Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110 PO ID NEXT PO Status Open Budget Status Not Chk'd

Copy From Hold From Further Processing

Header

\*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid

\*Supplier VCIVOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

\*Buyer ETEST Ella Test

PO Reference CPS - STATIONARY & FORMS

Amount Summary

Header Details Activity Summary

PO Defaults Edit Comments

PO Activities Add ShipTo Comments

Actions

Receipt Status Not Recvd

\*Dispatch Method Print Dispatch

Merchandise 1,644.77

Freight/Tax/Misc. 0.00

Total Amount 1,644.77 USD Calculate

Add Items From

Catalog Item Search

Purchasing Kit

Lines

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find | View All | First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	IRPI/FTA MANUAL		1.0000	T	69551	1,639.77000	1,639.77	Approved
2	000000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved

View Printable Version Close Short All Lines \*Go to More ...

Save Notify Refresh Add Update/Display

37. Click the **Line Comments** icon to enter comments specific to the line

38. Click the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

**Schedules**

Unit 01110 Supplier VCIA/OWP-001 PO Status Open  
PO ID NEXT PO Date 11/06/2018

Return to Main Page

**Lines** Find | View All First 1 of 2 Last

Line	Item	IRP/IFTA MANUAL	PO Qty	1.0000 T	Merchandise Amt	1,639.77 USD
1						

**Schedules** Personalize | Find | View All | First 1 of 1 Last

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	12/06/2018		1.0000	1,639.77000	1,639.77	Active

Add Ship To Comments

Save Notify Refresh Add Update/Display

39. The **Due Date** normally defaults in 30 days out, change this as appropriate to your situation

40. **Ship To** - Enter a ship to location:

VISION Purchasing "Ship To" locations have a specific format

Example: PFMTP001

P = Purchasing

FM = Origin Code for the Agency/Dept

MTP = Abbreviation for city/town

001 = First location for that origin code in the city/town.

41. Click the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier VCIA/OWP-001  
PO ID NEXT Item 000000000000004890

Line 2  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

**Distribution** Personalize | Find | View All | First 1 of 1 Last

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	Project
1	Open	100.0000	500.0000	5.00	USD	01110	517000	10000	1110030000			

OK Cancel Refresh

42. The **Distribute by** field defaults as **Quantity** change it to **Amount** as appropriate to the situation

43. Enter your department's Chartfield information specific to the purchase

44. Click **OK**

45. Complete the Schedule and Distribution pages for each line of the PO

Once you are back on the **Schedules** page,

**46. Click [Save](#)**

The following **Message** will open for each line of the PO if the Price or Quantity has been changed:

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

**47. Always Click [OK](#) to this message**

A PO ID number is assigned.

**48. Click the [Return to Main Page](#) link**

The **Purchase Order** page displays:

Maintain Purchase Order

**Purchase Order**

Business Unit 01110  
PO ID 0000000939

PO Status Open  
Budget Status Not Chk'd

Copy From

☐ Hold From Further Processing

▼ Header ?

\*PO Date 11/06/2018  
\*Supplier VCI/VOWP-001  
\*Supplier ID 0000041408  
\*Buyer ETEST

Supplier Search  
Supplier Details  
Vermont Correctional Industries/Vermont  
Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print

Dispatch

PO Reference CPS - STATIONARY & FORMS

Header Details  
PO Defaults  
PO Activities  
▼ Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments

Amount Summary ?

Merchandise 1,644.77  
Freight/Tax/Misc. 0.00  
Total Amount 1,644.77 USD

Calculate

Add Items From ?

Catalog  
Purchasing Kit

Item Search

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving **Print**

Personalize | Find | View All |  |  | First 1-2 of 2 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1		IRP/IFTA MANUAL	1.0000	T	69551	1639.77000	1,639.77	Approved			
2	000000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved			

View Printable Version

Close Short All Lines

\*Go to ... More ...

Save Notify Refresh

Add Update/Display

**Note: Complete the following steps if you plan to post multiple vouchers against the PO:**

**49. Click on the [Show all columns](#) icon**



Maintain Purchase Order

Purchase Order

Business Unit 02150

PO ID 0000034063

Copy From

PO Status Dispatched

Budget Status Valid

☐ Hold From Further Processing

Header

\*PO Date 05/10/2019

Supplier Search

\*Supplier WALSELECT-001

Supplier Details

\*Supplier ID 0000001569

Walsh Electric Supply Co Inc.

\*Buyer TMCSWEEN

Tiffany Jean Ann Davis

PO Reference AIR-151

Header Details

PO Defaults

PO Activities

Requisitions

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

Document Status

Doc Tol Status Valid

Backorder Status Not Backordered

Create BackOrder

Receipt Status Not Recvd

\*Dispatch Method Print

Dispatch

Amount Summary

Merchandise 572.37

Freight/Tax/Misc. 0.00

Total Amount 572.37 USD

Encumbrance Balance 83.12 USD

Calculate

Add Items From

Catalog

Item Search

Select Lines To Display

Select Lines To Display

Line  To

Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Due Date	Ship To	Price
1		LED LAMPS AND FIXTURES		1.0000	EA	28551	572.37000	572.37 Approved	06/09/2019	PMILSBRL04	572.37000

View Printable Version

Close Short All Lines

\*Go to 


More

Save

Return to Search

Notify

Refresh

Purchase Order Code	Stockless	Device Tracking	Withholding	Physical Nature	*Price Qty	*Price Date	Amount Only	RFP ID	RFP Line		SetID	Contract ID	Contract Value
indard	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Goods	Line Ql. ▾	Due ▾	<input checked="" type="checkbox"/>				STATE	0000000000000000000000037366	

**52.** Scroll back to the left and click **Save**

## Enter a Purchase Order Against a Contract is Complete

## Add Attachments to Purchase Order Header or Lines

**Situations when this function is used:** When creating a Purchase Order, users may need to add attachments at the Header or Line level.

**Note:** the following steps address only adding the attachment, not creating the Purchase Order in entirety. Other training manual topics address the steps for Creating Purchase Orders within this document.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Purchase Order Add/Update

The **Purchase Order** page displays:

**Purchase Order**

Find an Existing Value Add a New Value

Business Unit 01110 PO ID NEXT

Add

1. Click **Add**

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110 PO ID NEXT

PO Status Open Budget Status Not Chk'd

Copy From [ ] Hold From Further Processing

**Header**

\*PO Date 11/06/2018 Supplier Search Doc Tol Status Valid

\*Supplier VCINOWP-001 Supplier Details

\*Supplier ID 0000041408 Vermont Correctional Industries/Vermont

\*Buyer ETEST Ella Test

PO Reference CPS - STATIONARY & FORMS

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

Actions

**Amount Summary**

Merchandise 1,644.77

Freight/Tax/Misc. 0.00

Total Amount 1,644.77 USD

Calculate

**Add Items From**

Catalog Item Search

Purchasing Kit

**Lines**

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Personalize Find View All First 1-2 of 2 Last

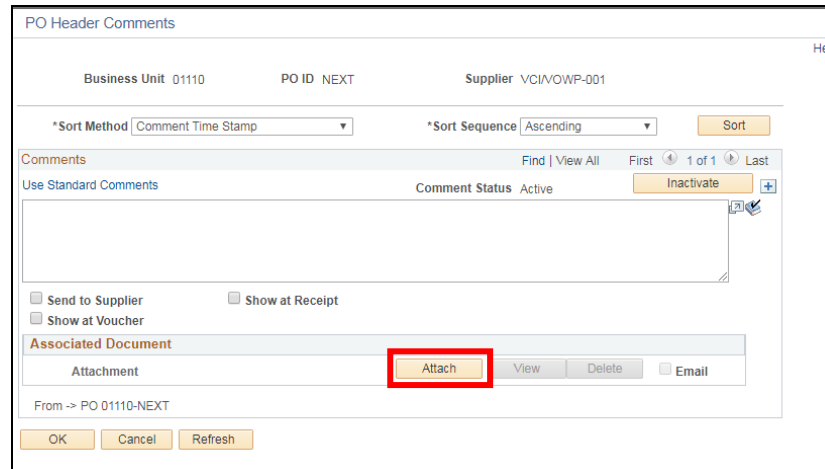
Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	IRP/IFTA MANUAL		1.0000	T	69551	1,639.77000	1,639.77	Approved
2	000000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

2. Click on the **Add Comments** link to enter an attachment that relate to the Purchase Order as a whole

The **PO Header Comments** window opens:

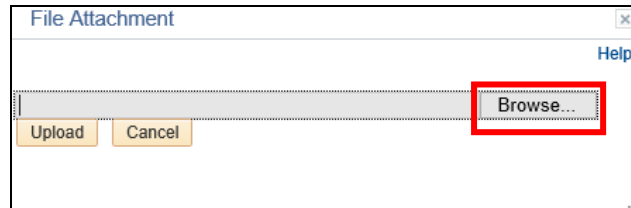


The PO Header Comments window displays the following information:

- Business Unit: 01110
- PO ID: NEXT
- Supplier: VCI/VOWP-001
- \*Sort Method: Comment Time Stamp
- \*Sort Sequence: Ascending
- Sort button
- Comments section with Find | View All, First, 1 of 1, Last, and Inactivate buttons.
- Use Standard Comments and Comment Status: Active.
- Send to Supplier and Show at Receipt checkboxes.
- Show at Voucher checkbox.
- Associated Document section with an Attachment box and an Attach button (highlighted with a red box).
- View, Delete, and Email buttons.
- From -> PO 01110-NEXT
- OK, Cancel, and Refresh buttons.

3. Click **Attach** within the Associated Document box

The **File Attachment** box opens:

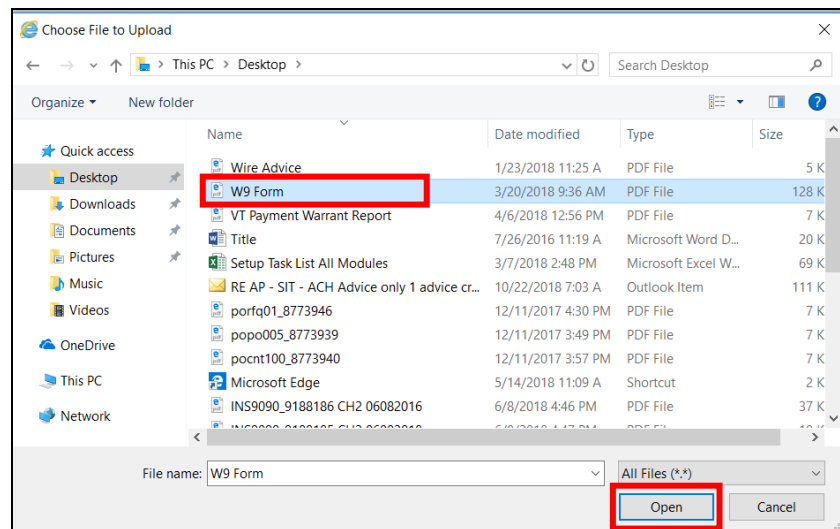


The File Attachment box displays the following information:

- File Attachment title bar.
- Help button.
- Upload, Cancel, and Browse... buttons. The Browse... button is highlighted with a red box.

4. Click **Browse** to search for files to choose to upload as an attachment

Note that you can select files on local or network drives that your computer has access to:



5. Select the file and click **Open**

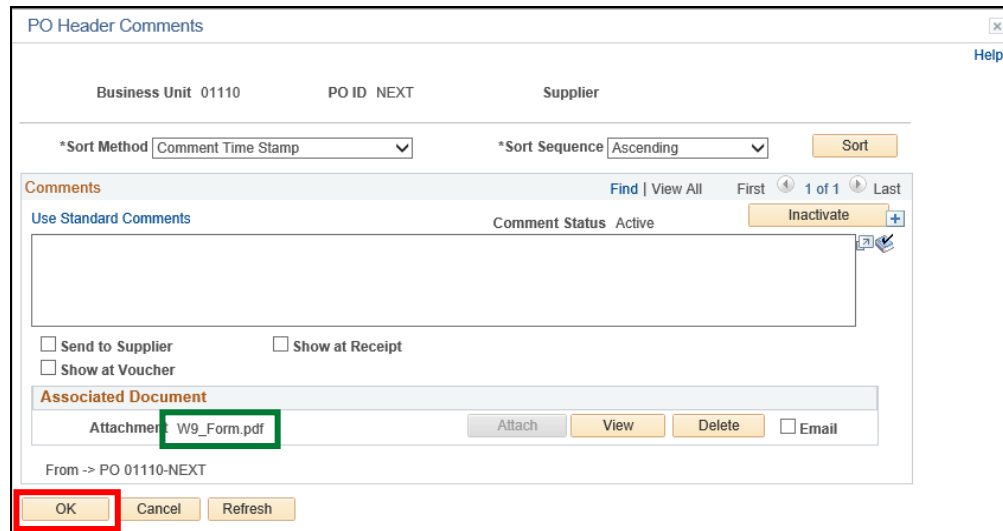
You will be returned to the **File Attachment** page with the file name selected defaulted in:



The 'File Attachment' dialog box shows the file path 'C:\Users\john.kennerknecht\Desktop\W9 Form.pdf' selected. The 'Upload' button is highlighted with a red box.

6. Click **Upload** to attach your file to the Purchase Order

You are returned to the **PO Header Comments** window:

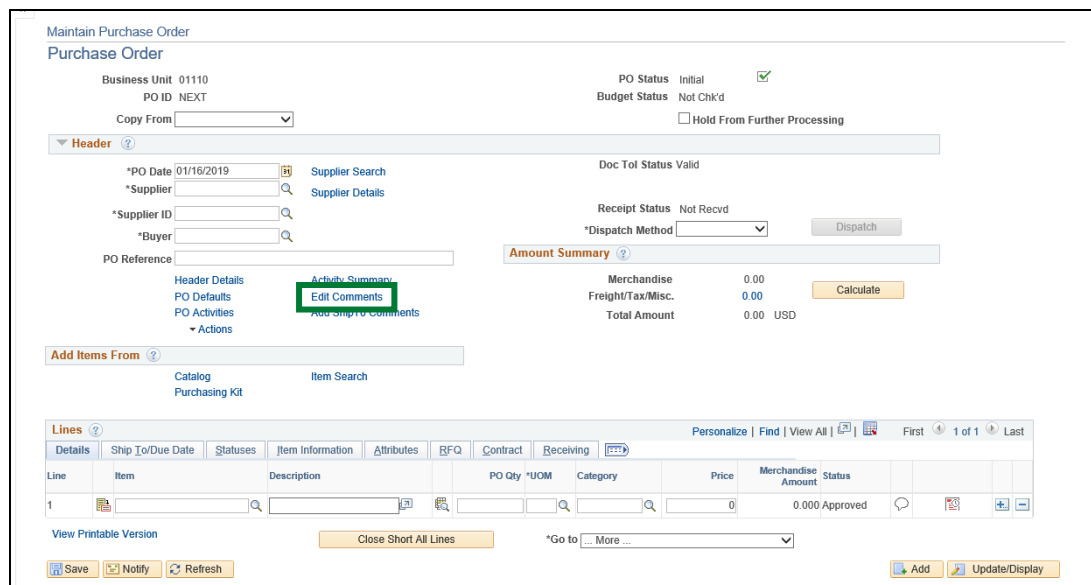


The 'PO Header Comments' window displays the 'Associated Document' section with the attachment 'W9\_Form.pdf' highlighted by a green box. The 'OK' button at the bottom is highlighted with a red box.

The attachment is displayed in the Associated Document section.

7. Click **OK**

The **Purchase Order** page displays:



The 'Maintain Purchase Order' page shows the 'Purchase Order' header with various fields. The 'Edit Comments' link in the 'Actions' menu is highlighted with a green box.

The link has changed to **Edit Comments**.

8. Click the **Line Comments** icon to enter comments specific to the line

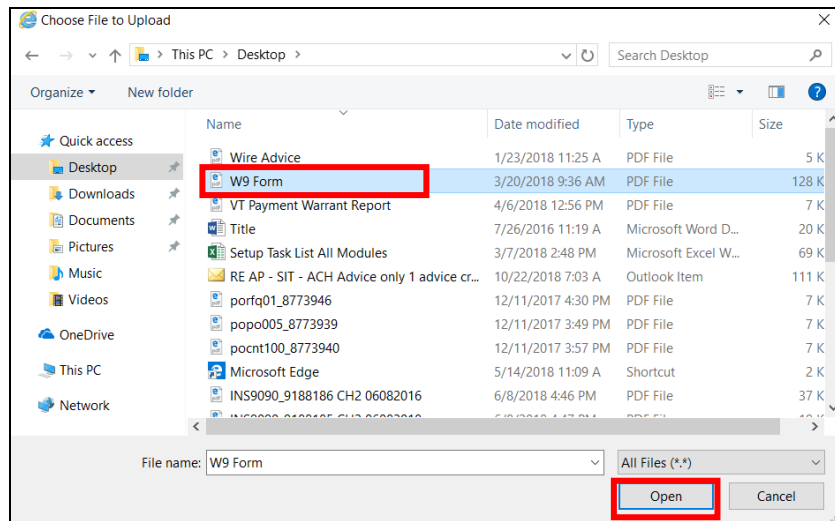
The PO Comments page displays:

9. Click **Attach** within the **Associated Document** box

The **File Attachment** window opens:

10. Click **Browse** to search for files to choose to upload as an attachment

Note that you can select files on local or network drives that your computer has access to:



11. Select the file

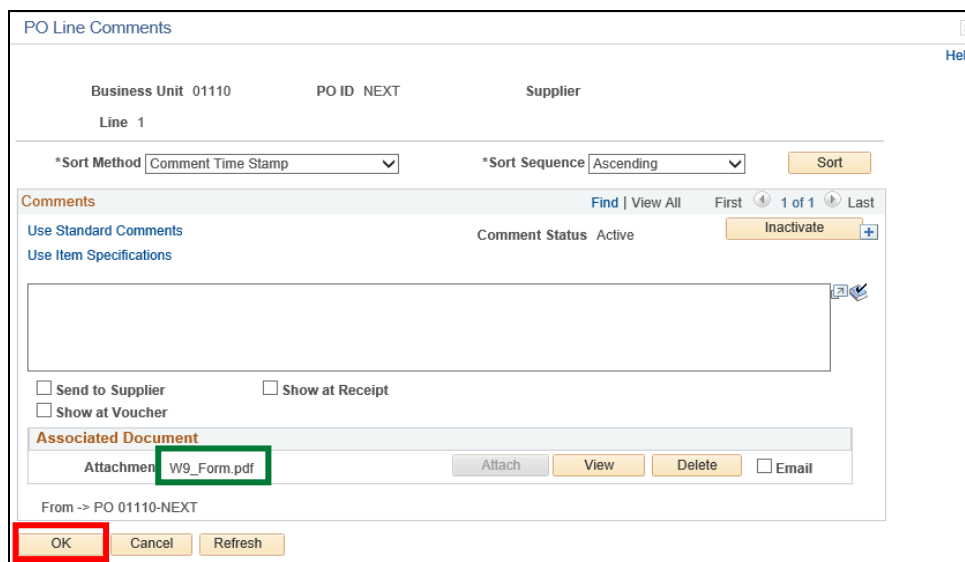
12. Click **Open**

You will be returned to the **File Attachment** window with the file name selected defaulted in:



13. Click **Upload** to attach your file to the Purchase Order

You are returned to the **PO Lines Comment** page:



The attachment is displayed in the Associated Document section.

14. Click **OK**

The **Purchase Order** page displays:

Maintain Purchase Order  
Purchase Order

Business Unit 01110  
PO ID NEXT  
Copy From

PO Status Initial ☒  
Budget Status Not Chkd  
☐ Hold From Further Processing

**Header**

\*PO Date 01/16/2019 [Supplier Search](#)  
\*Supplier  [Supplier Details](#)  
\*Supplier ID    
\*Buyer    
PO Reference

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method  [Dispatch](#)

**Amount Summary**

Merchandise	0.00	<a href="#">Calculate</a>
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Header Details  
PO Defaults  
PO Activities  
Activity Summary  
Edit Comments  
Add ShipTo Comments  
Actions

**Add Items From**

Catalog  
Purchasing Kit  
[Item Search](#)

**Lines**

Personalize | Find | View All | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0.000	Approved			

[View Printable Version](#) [Close Short All Lines](#) \*Go to  More ...

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

The **Line Comments** icon updated to show there is an attachment.

**Add Attachments to Purchase Order Header or Lines is Complete**

## Enter a Purchase Order against a Contract with Split Funding

**Situations when this function is used:** When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

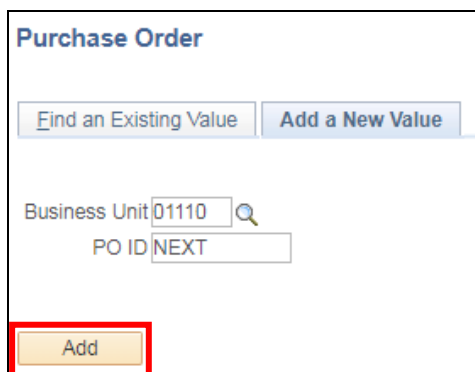
**Note:** *In this exercise we are demonstrating the best way to enter a purchase order against a contract that has multiple lines, but not all the contract lines are needed.*

Purchase Orders must be approved, have a valid budget check, and dispatched in order to be used in a Voucher.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



1. Click **Add**



The **Purchase Order** page displays:

Maintain Purchase Order

**Purchase Order**

Business Unit 01110  
PO ID NEXT  
Copy From [Dropdown]  
PO Date 11/02/2018  
\*Supplier VCI/VOWP-001  
\*Supplier ID 0000041408  
\*Buyer ETEST  
PO Reference [Field]  
Header Details  
PO Defaults  
PO Activities  
Actions

Supplier Search  
Supplier Details  
Eric John Hoefel

PO Status Initial  
Budget Status Not Chkd  
Hold From Further Processing

Doc Tol Status Valid  
Receipt Status Not Recvd  
\*Dispatch Method [Dropdown]  
Dispatch

Amount Summary  
Merchandise 0.00  
Freight/Tax/Misc. 0.00  
Total Amount 0.00 USD  
Calculate

Add Items From [Dropdown]  
Catalog  
Purchasing Kit

Lines  
Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving  
Line 1 Item [Field] Description [Field] PO Qty [Field] \*UOM [Field] Category [Field] Price [Field] Merchandise Amount 0.000 Status Approved  
View Printable Version  
Close Short All Lines  
\*Go to ... More ...  
Save Notify Refresh Add Update/Display

The following information defaults in: PO Status = Initial, Budget Status = Not Checked and PO Date = Current Date.

## 2. Supplier Short Name or Supplier ID# - Enter one or the other

If entering the number be sure to include all the leading zero's, click the Refresh button at the bottom of the page and Supplier name automatically populates **or** open a new window and use the Vendor pages for look up

The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract. To update the supplier address on the Purchase Order, Click the Supplier Search hyperlink to select a different address option

Header

\*PO Date 01/22/2019  
\*Supplier VCI/VOWP-001  
\*Supplier ID 0000041408  
\*Buyer ETEST  
PO Reference [Field]  
Header Details  
PO Defaults  
PO Activities  
Actions

Supplier Search  
**Supplier Details**  
Vermont Correctional Industries/Vermont  
Ella Test

Doc Tol Status Valid  
Receipt Status Not Recvd  
\*Dispatch Method Print  
Dispatch

Amount Summary  
Merchandise 0.00  
Freight/Tax/Misc. 0.00  
Total Amount 0.00 USD  
Calculate

## 3. Click the **Supplier Details** link to update the Supplier Address number on the Purchase Order

The **PO Supplier Information** page displays:

4. Click on the **Magnifying Glass** to see the supplier addresses available and select an address
5. Click **OK**

6. **Buyer** - Enter the buyer, this field is case sensitive, so the name must be entered in UPPER case with the first initial of the first name followed by the first 7 letters of the last name and tab out of the field or click on the magnifying glass to select from a list of values
7. Click on the **Contract** tab

8. **Contract ID** - Enter the contract ID or click the **Magnifying Glass** to select from a list:

Supplier Set ID	Supplier ID	Contract ID	Short Supplier Name	Contract Status	Description	Contract Beginning Date	Expire Date
STATE	0000041408	00000000000000000000000034429	VCIVOWP-001	Approved	DMV MANUALS	08/01/2017	07/31/2019
STATE	0000041408	00000000000000000000000031144	VCIVOWP-001	Approved	CPS - STATIONARY & FORMS	03/31/2016	04/01/2019
STATE	0000041408	00000000000000000000000030918	VCIVOWP-001	Approved	CPS-HIGHWAY SIGNS AND ACCESS	03/01/2016	02/28/2019

9. Click on the **Contract ID** link to select a contract

**Note: The following must be true for a contract to be available to use:**

- **The Contract must be in Approved Status**
- **The Contract Beginning date must be less than or equal to the PO Date**
- **The Contract Expire Date must be equal to or greater than the PO Date**

If an invoice for a product or service is received after the contract has expired, but the order for the product or service was performed before the contract expiration date, you can and should use the contract. Please refer to the [Enter a Purchase Order against an Expired Contract](#) exercise in this manual.

10. Click the **Magnifying Glass** next to the Contract Line field to select the appropriate contract line



Additional line(s) are added to the PO:

**Maintain Purchase Order**  
**Purchase Order**

Business Unit 01110  
 PO ID NEXT  
 Copy From [dropdown]

PO Status Open  
 Budget Status Not Chk'd  
☐ Hold From Further Processing

**Header** ?

\*PO Date 11/06/2018 Supplier Search  
 \*Supplier VCI/VOWP-001 Supplier Details  
 \*Supplier ID 0000041408 Vermont Correctional Industries/Vermont  
 \*Buyer ETEST Ella Test  
 PO Reference CPS - STATIONARY & FORMS

Doc Tol Status Valid  
 Receipt Status Not Recvd  
 \*Dispatch Method Print Dispatch

**Amount Summary** ?

Merchandise	0.01	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	0.01	USD

**Add Items From** ?

Catalog Item Search  
 Purchasing Kit

**Lines** ?

**Details** Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line
1	00000000000004890	BUSINESS CARDS -	STATE	0000000000000000031144	1	1	
2			STATE				

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh

17. Go through the process of entering the contract number and selecting the appropriate contract line number for each additional PO line.

Once all contract information has been entered,

18. Click on the **Details** tab

**Maintain Purchase Order**  
**Purchase Order**

Business Unit 01110  
 PO ID NEXT  
 Copy From [dropdown]

PO Status Open  
 Budget Status Not Chk'd  
☐ Hold From Further Processing

**Header** ?

\*PO Date 11/06/2018 Supplier Search  
 \*Supplier VCI/VOWP-001 Supplier Details  
 \*Supplier ID 0000041408 Vermont Correctional Industries/Vermont  
 \*Buyer ETEST Ella Test  
 PO Reference CPS - STATIONARY & FORMS

Doc Tol Status Valid  
 Receipt Status Not Recvd  
 \*Dispatch Method Print Dispatch

**Amount Summary** ?

Merchandise	10.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	10.00	USD

**Add Items From** ?

Catalog Item Search  
 Purchasing Kit

**Lines** ?

**Details** Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	00000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved
2	00000000000004570	LETTERHEAD,	500.0000	T	69530	0.01000	5.00	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display

19. Adjust the PO Qty & Price fields as appropriate to your situation and in compliance with the contract terms

20. Click **Refresh**

21. Click on the **Header Details** link

The **PO Header Details** page displays:

**22. PO Type** - Enter by clicking on the **Magnifying Glass**

**23. Origin** - Enter by clicking on the **Magnifying Glass**

**24. Click OK**

If you receive the following **Message**:

**25. Click Yes or No** as it applies to the current situation (if you've changed the price on the PO – Click **No**, also this message will appear for each line on the PO)

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Icons
1	000000000000004890	BUSINESS CARDS -	500.0000	LOT	69530	0.01000	5.00	Approved	[Schedule Icon]
2	000000000000004571	LETTERHEAD,	500.0000	T	69530	0.01000	5.00	Approved	[Schedule Icon]

**26. Click the Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

**Schedules**

Unit 01110 Supplier VCI/VOWP-001 PO Status Open  
PO ID NEXT PO Date 01/22/2019

Return to Main Page

**Lines** Find | View All First 1 of 2 Last

Line	Item	PO Qty	Merchandise Amt
Line 1	00000000000004890 BUSINESS CARDS - PRINTED IN GREEN AND BLACK INK. SIZE: 3.5" X 2". STOCK: RECYCLED 100 LB. BRISTOL, WHITE. SEE ATTACHED PRICE LIST.	500.0000 LOT	5.00 USD

**Schedules** Personalize | Find | View All | First 1 of 1 Last

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	02/21/2019	PFMTP002	500.0000	0.01000	5.00	Active

Add ShipTo Comments

Save Notify Refresh Add Update/Display

27. The **Due Date** normally defaults in 30 days out, change this as appropriate to your situation

28. **Ship To** - Enter a ship to location:

VISION Purchasing "Ship To" locations have a specific format

Example: PFMTP001 - P = Purchasing; FM = Origin Code for the Agency/Dept; MTP = Abbreviation for city/town; 001 = First location for that origin code in the city/town

29. Click the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier VCI/VOWP-001  
PO ID 0000000940 Item 00000000000004570

Line 2  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

**Distribution** Personalize | Find | View All | First 1-2 of 2 Last

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	Project
1	Open	50.0000	250.0000	2.50	USD	01110	517000	10000	1110003000			
2	Open	50.0000	250.0000	2.50	USD	01110	517000	10000	1110003000			

OK Cancel Refresh

30. The Distribute by field defaults as **Quantity**, you can change it to **Amount** IF appropriate to the situation

31. The Percent field is 100.0000, for a split funding PO, change the percent field to the needed value for distribution line 1

32. Enter Chartfield information

The PO Qty and Amount automatically recalculate to reflect the percentage that was entered.

33. Click the **+** icon to insert an additional row(s) and the remaining percentage will default in

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

34. Adjust the number of lines if desired

35. Click **OK**

The second distribution opens for Line 1 of the purchase order. The remaining percent has populated the Percent field. The PO Qty and Amount have also defaulted in according to the percentage for the line.

36. Enter Chartfield information for the second distribution.

If there are more than two funding sources change the percentage and continue to insert rows using the **+** icon at the far right of the row.

37. Click **OK** once all funding information has been entered

You are returned to the **Schedules** page:

Maintain Purchase Order

Schedules

Unit 01110 Supplier VCI/VOWP-001 PO Status Open

PO ID NEXT PO Date 11/06/2018

[Return to Main Page](#)

Lines

Line 1 Item 00000000000004890 BUSINESS CARDS - PRINTED IN GREEN AND BLACK INK. SIZE: 3.5" X 2". STOCK: RECYCLED 100 LB. BRISTOL, WHITE. SEE ATTACHED PRICE LIST. PO Qty 500.0000 LOT Merchandise Amt 5.00 USD

Schedules

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV | Personalize | Find | View All | First | 1 of 1 | Last

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	12/06/2018	PFMMP001	500.0000	0.01000	5.00	Active

Add ShipTo Comments

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

38. Click **Save**

The following **Message** may open for each line on the PO:

Message

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

OK Cancel

39. Click **OK**

40. Click on the **Return to Main Page** link



You are returned to the **Maintain Purchase Order** page:

#### 41. Click **Save**

**Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).**

Follow specific controls in place in your department for approval and budget checking.

As noted at the beginning of this lesson, a PO must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch PO's. Instructions on how to dispatch PO's manually can be found in the [Purchase Orders 102 manual](#).

### Entering a PO against a Contract with Split Funding is Complete

## Enter a Purchase Order Against an Expired Contract

**Situations when this function is used:** Occasionally an invoice is received for work done under a contract or products ordered on a contract that may have since expired. In order to pay the invoice, you need to enter a purchase order to draw down on the contract.

**Note:** *The only way to draw down on an expired contract is to change the PO Date to a date that is prior to the expiration date on the contract.*

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:

The screenshot shows the 'Purchase Order' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, there are input fields for 'Business Unit' (containing '01110') and 'PO ID' (containing 'NEXT'). At the bottom left, there is a red rectangular box highlighting the 'Add' button.

1. Click **Add**

The **Maintain Purchase Order** page displays:

The screenshot shows the 'Maintain Purchase Order' page. At the top, there are fields for 'Business Unit' (01110), 'PO ID' (NEXT), and 'Copy From'. Below these, there are tabs for 'Header', 'Supplier', and 'Buyer'. The 'Header' tab is selected, showing fields for 'PO Date' (09/10/2018), 'Supplier Search', 'Supplier Details', 'Receipt Status' (Not Recvd), and 'Dispatch Method'. Below these, there is an 'Amount Summary' section with fields for 'Merchandise' (0.00), 'Freight/Tax/Misc.' (0.00), and 'Total Amount' (0.00 USD). At the bottom, there is a 'Lines' section with a table showing the details of the purchase order lines. The table has columns for 'Line', 'Item', 'Description', 'PO Qty', 'UOM', 'Category', 'Price', 'Merchandise Amount', and 'Status'. The first line is shown with a quantity of 1 and a status of 'Approved'.

The following information defaults in: PO Status = Initial, Budget Status = Not Checked, and PO Date = Current Date (*Remember, to enter against an expired contract, this date must be changed to a date that is prior to the expiration date on the contract*)

2. Change the **PO Date** to before the contract expiration date

The following **Message** may appear:

Message

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.

OK

3. Click **OK**

In the **Header** section of the **Maintain Purchase Order** page:

▼ Header ?

\*PO Date 09/10/2018 Supplier Search Doc Tol Status Valid

\*Supplier WBMAISONCOI-001 Supplier Details

\*Supplier ID 0000283240 W.B. Mason Co., Inc.

\*Buyer PO Reference

Receipt Status Not Recvd

\*Dispatch Method Print Dispatch

Amount Summary ?

Merchandise	0.00	Calculate
Freight/Tax/Misc.	0.00	
Total Amount	0.00 USD	

Header Details Activity Summary

PO Defaults Add Comments

PO Activities Add ShipTo Comments

▼ Actions

4. Enter the **Supplier ID** or open a new window and use the Supplier pages to look up a Supplier ID

5. Click on the **Supplier Details** link to Verify the Supplier Address with the invoice received

PO Supplier Information

Maintain Purchase Order

Supplier Details -- W.B. Mason Co., Inc.

Business Unit 01110 PO ID NEXT Supplier WBMAISONCOI-001

\*Location MULTIPLE Supplier Information

\*Address 1 Contact Salesperson

NET30 Net 30

Inv Date

Supplier Details Message

Country USA United States

Address 1 68 Nesti Drive

Address 2

Address 3

City South Burlington

County

State VT Vermont

Postal 05403

888/926-2766

Look Up Address

Cancel

Search Results

Supplier ID	Address Sequence Number	Description
0000283240	1	Remit/Order South Burlington
0000283240	2	Remit/Order Boston

OK Cancel Refresh

6. Select the **Supplier Remit to Address** that matches the invoice received

7. Click **OK**

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order

Purchase Order

Business Unit 01110

PO ID NEXT

Copy From

PO Status Open

Budget Status Not Chk'd

Hold From Further Processing

Header

PO Date 05/30/2018

Supplier WBMA500001

Supplier ID 0000283240

Buyer ETEST

PO Reference

Supplier Search

Supplier Details

W.B. Mason Co., Inc.

Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd

Dispatch Method Print

Dispatch

Amount Summary

Merchandise	0.00	
Freight/Tax/Misc.	0.00	Calculate
Total Amount	0.00	USD

Add Items From

Catalog

Item Search

Purchasing Kit

Lines

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RfQ

Contract

Receiving

Personalize

Find

View All

First

1 of 1

Last

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1						0	0.000	Approved

View Printable Version

Close Short All Lines

\*Go to ... More ...

8. Enter the **Buyer**
9. Click on the **Copy From** drop-down menu and select **Contract**

The **Copy Purchase Order from Contract** page displays:

Copy Purchase Order from Contract

Contract Selection Criteria

Contract SetID STATE

Supplier WBMASONCOI-001

Contract ID

Supplier ID 0000283240

☐ Allow Open Item Contract Only

Master Contract

Search

Select Contract

Personalize | Find | View All | First 1 of 1 Last

Contracts

More Details

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>						

OK

Cancel

Refresh

10. Enter the **Contract ID** or use the **Magnifying Glass** to find one
11. Click **Search**

[illegible]

12. Click on the **Select** box
13. Click **OK**

The **Maintain Purchase Order** page displays:

14. Click on the **Contract** tab

The **Contract ID** and **Contract line(s)** display:

Line	Item	Description	SetID	Contract ID	Contract Version	Contract Line	Category Line
1		ALLSTEEL MODULAR	STATE	0000000000000000000000031783	1	1	
2		RECONFIGURATION	STATE	0000000000000000000000031783	1	2	
3		DESIGN	STATE	0000000000000000000000031783	1	3	

Remember, the contract must be in **Approved** status to be available for use.

15. Click the **Details** tab and continue entering the PO information as you normally would

**Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).**

Follow specific controls in place in your department for approval and budget checking.

A PO must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch PO's. Instructions on how to dispatch PO's manually can be found in the [Purchase Orders 102 manual](#).

### Entering a PO against an Expired Contract is Complete

## Copy an Existing Purchase Order

**Situations when this function is used:** A purchase order is entered every month for an order or service that occurs each month. An existing purchase order can be copied into a new purchase order which will save time.

**WorkCenter navigation:** Purchasing WorkCenter (PO) > Links Pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:

The screenshot shows the 'Purchase Order' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, there are input fields for 'Business Unit' (containing '02300') and 'PO ID' (containing 'NEXT'). At the bottom of the form, there is a yellow 'Add' button, which is highlighted with a red rectangular box.

1. Click **Add**

The **Maintain Purchase Order** page displays:

The screenshot shows the 'Maintain Purchase Order' page. At the top, there are fields for 'Business Unit' (02300) and 'PO ID' (NEXT). To the right, there are status fields: 'PO Status' (Initial), 'Budget Status' (Not Chk'd), and a checkbox for 'Hold From Further Processing'. Below these, there is a 'Copy From' dropdown menu, which is highlighted with a red rectangular box. The page also includes a 'Header' section with fields for 'PO Date' (10/15/2018), 'Supplier', 'Supplier ID', and 'Buyer'. There is an 'Amount Summary' section with fields for 'Merchandise', 'Freight/Tax/Misc.', and 'Total Amount'. At the bottom, there is a 'Lines' section with a table for 'Line', 'Item', 'Description', 'PO Qty', 'UOM', 'Category', 'Price', 'Merchandise Amount', and 'Status'. The table has one row with line number 1. At the bottom of the page, there are buttons for 'Save', 'Notify', 'Refresh', 'Close Short All Lines', and 'Add/Update/Display'.

2. Click on the drop-down arrow in the **Copy From** box and choose **Purchase Order**

The **Copy Purchase Order from Purchase Order** page displays:

**PO Selection Criteria**

PO ID: 0000004445 PO Date: [Date Picker]  
 Supplier: [Text Box] Status: [Dropdown]  
 Supplier ID: [Text Box] Origin: [Text Box]  
 Buyer: [Text Box] Item ID: [Text Box]  
 PO Reference: [Text Box] Category: [Text Box]

**Search**

**Select PO** Personalize | Find | View All | First | 1 of 1 | Last

Select	PO ID	PO Date	PO Status	Supplier ID	Supplier
<input checked="" type="checkbox"/>	0000004445	08/30/2018	Dispatched	0000001293	IRVING ENE-002

**OK** Cancel Refresh

3. Enter the **PO ID** you wish to copy from in the PO ID field or click the **Magnifying Glass** to select from a list of values

4. Click **Search**

The **PO Details** populate.

5. Click the **Select** box to the left of the **PO ID**

6. Click **OK**

You are returned to the **Maintain Purchase Order** page:

**Maintain Purchase Order**  
**Purchase Order**

Business Unit: 02300 PO ID: NEXT  
 Copy From: [Dropdown]

PO Status: Open Budget Status: Not Chk'd  
☐ Hold From Further Processing

**Header** ?

\*PO Date: 10/15/2018 Supplier Search  
 \*Supplier: IRVING ENE-002 Supplier Details  
 \*Supplier ID: 0000001293 Irving Energy  
 \*Buyer: KSYMONDS Karen L Symonds  
 PO Reference: [Text Box]

Doc Tot Status: Valid  
 Receipt Status: Not Recvd  
 \*Dispatch Method: Print Dispatch

**Amount Summary** ?

Merchandise	8.60
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	<b>8.60 USD</b>

**Calculate**

**Add Items From** ?

Catalog Item Search  
 Purchasing Kit

**Lines** ? Personalize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	PO Qty	UOM	Category	Price	Merchandise Amount	Status
1	000000000000008661	LIQUID PROPANE -	860.0000	GAL	40506	0.01000	8.60	Approved

View Printable Version Close Short All Lines \*Go to: More ...

Save Notify Refresh Add Update/Display

All information from the purchase order that was copied has now populated the new PO fields. Adjustments can be made to the purchase order to reflect any changes needed. PO Date defaults in as current date.

**Note: It is recommended that when the VISION Copy functionality is used all data entry fields in the new PO be reviewed for accuracy and appropriateness.**

7. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Type & Origin will populate, Accounting Date should be current date.

8. Click **OK**

You are returned to the **Maintain Purchase Order** page:

9. Click **Save** once the PO has been reviewed

The following **Message** will open for each line of the PO:

10. Click **OK**



The PO has been saved and a PO ID number assigned:

The screenshot shows the 'Maintain Purchase Order' interface. At the top, the 'Business Unit' is 02300 and the 'PO ID' is 0000004447, which is highlighted with a green box. The 'PO Status' is 'Open' and the 'Budget Status' is 'Not Chk'd'. There are buttons for 'Copy From', 'Hold From Further Processing', 'Supplier Search', 'Supplier Details', 'Receipt Status', 'Dispatch Method', and 'Dispatch'. The 'Amount Summary' section shows a 'Total Amount' of 8.60 USD. The 'Lines' section at the bottom shows a single line item for 'LIQUID PROPANE -' with a quantity of 860.0000 and a price of 0.01000.

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	000000000000008661	LIQUID PROPANE -	860.0000	GAL	40506	0.01000	8.60	Approved

**Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).**

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

### Copying an Existing Purchase Order is Complete

## Copy a Purchase Order from a Contract using every Contract Line

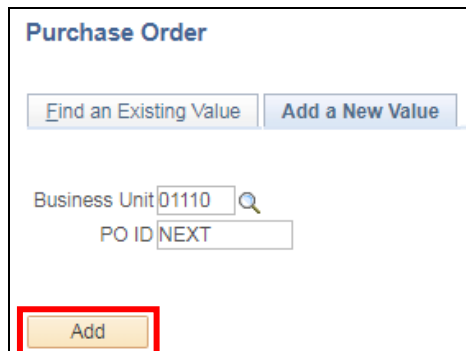
**Situations when this function is used:** When making payments on contracts for services, products, and construction regardless of dollar amount in accordance with Bulletin 3.5 and VISION Procedure #3.

**Note:** *Purchase Orders must be approved, have a valid budget check, and be dispatched in order to be used in a Voucher.*

**WorkCenter navigation:** Purchasing WorkCenter > Links Pagelet > Purchase Orders > Purchase Order Add/Update

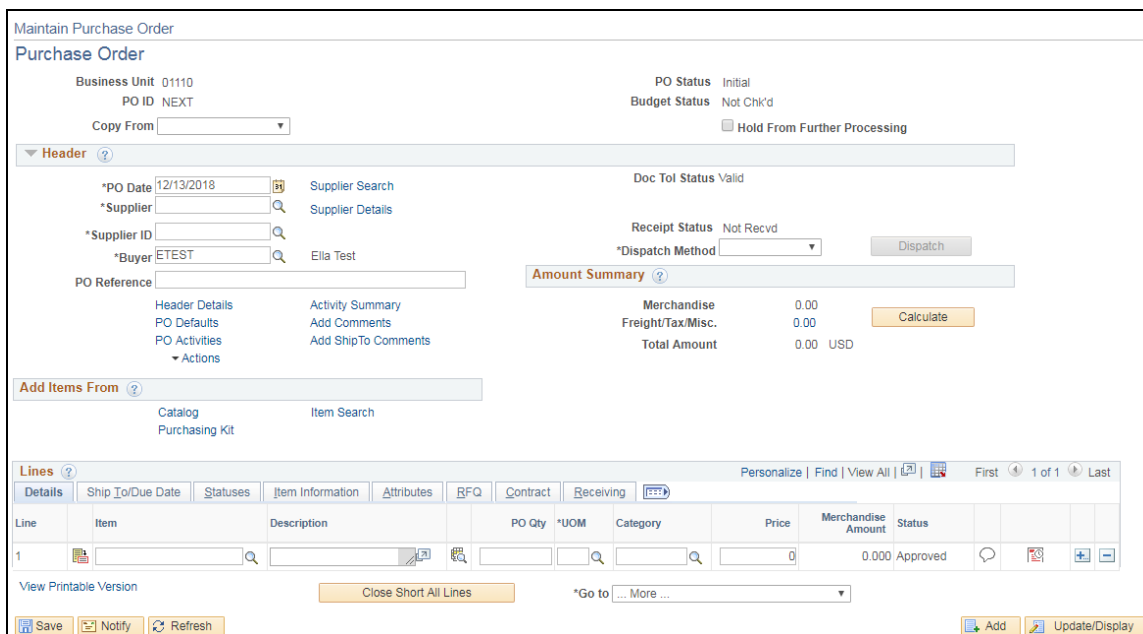
**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays:



1. Click **Add**

The **Maintain Purchase Order** page displays:



2. Click on the drop-down arrow in the **Copy From** field and select **Contract**

The **Copy Purchase Order from Contract** page displays:

Copy Purchase Order from Contract

Help

Contract Selection Criteria

Contract SetID STATE  
Supplier [text] 🔍  
Contract ID 000000000000000000000000034576 🔍  
☐ Allow Open Item Contract Only  
Master Contract [text] 🔍

Search

Select Contract

Personalize | Find | View All | 📄 | ⌂ First 1 of 1 Last

Contracts | More Details | 🗨️

Select

Select	SetID	Contract	Description	Supplier ID	Begin Date	Expire Date
<input type="checkbox"/>	STATE	000000000000000000000000034576	Rubrik Back Up Solution	0000294841	07/31/2017	08/15/2022

OK

Cancel

Refresh

3. Enter your Contract Selection Criteria (Contract ID or Supplier ID)
4. Click **Search**

The **Contract** information populates.

- Click the checkbox under **Select** on the left side of the page
- Click **OK** to have contract quantity and amount from the contract default into the purchase order or click **Cancel** to enter a line quantity and amount on the purchase order

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order			
<b>Purchase Order</b>			
<b>Business Unit</b> 01110	<b>PO Status</b> Open		
<b>PO ID</b> NEXT	<b>Budget Status</b> Not Chk'd		
<b>Copy From</b> [v]	<input type="checkbox"/> Hold From Further Processing		
<b>Header</b> ?			
* <b>PO Date</b> 12/13/2018 [v]	<b>Supplier Search</b>	<b>Doc Tol Status</b> Valid	
* <b>Supplier</b> PRESIDIONE-001 [v]	<b>Supplier Details</b>		
* <b>Supplier ID</b> 0000294841 [v]	<b>Presidio Networked Solutions</b>	<b>Receipt Status</b> Not Recvd	
* <b>Buyer</b> ETEST [v]	Ella Test	<b>*Dispatch Method</b> Print [v]	[Dispatch]
<b>PO Reference</b> Rubrik Back Up Solution	<b>Amount Summary</b> ?		
<b>Header Details</b>	<b>Activity Summary</b>		
<b>PO Defaults</b>	<b>Add Comments</b>	<b>Merchandise</b> 0.02	
<b>PO Activities</b>	<b>Add ShipTo Comments</b>	<b>Freight/Tax/Misc.</b> 0.00	[Calculate]
▼ Actions		<b>Total Amount</b> 0.02 USD	
<b>Add Items From</b> ?			
<b>Catalog</b>	<b>Item Search</b>		
<b>Purchasing Kit</b>			
<b>Lines</b> ?			
<b>Details</b>		<b>Personalize   Find   View All</b> [v] [v] [v]	
<b>Ship To/Due Date</b>		<b>First</b> 1-2 of 2 Last	
<b>Statuses</b>			
<b>Item Information</b>			
<b>Attributes</b>			
<b>RFCQ</b>			
<b>Contract</b>			
<b>Receiving</b> [v]			
<b>Line</b>	<b>Item</b>	<b>Description</b>	<b>PO Qty *UOM Category Price Merchandise Amount Status</b>
1	[v]	Rubrik Back Up [v]	1.0000 EA 20584 0.01000 0.01 Approved [v] [v] [v] [v]
2	[v]	Rubrik Back up Service [v]	1.0000 EA 00101 0.01000 0.01 Approved [v] [v] [v] [v]
<b>View Printable Version</b>			
<b>Close Short All Lines</b>			
<b>*Go to ... More ...</b> [v]			
[Save]	[Notify]	[Refresh]	[Add] [Update/Display]

Supplier ID and line information defaulted in from the contract.

7. Click on the **Header Details** link

The **PO Header Details** page displays:

8. Enter the **PO Type** by clicking on the **Magnifying Glass**

9. Enter the **Origin** by clicking on the **Magnifying Glass**

10. Click **OK**

You are returned to the **Maintain Purchase Order** page:

11. Adjust the **PO Qty** and **Price** fields as appropriate to your situation and in compliance with contract terms.

12. Click on the **Schedule** icon

The **Schedules** page displays:

13. Update the **Due Date** field as necessary

14. Enter a **Ship To** location

15. Click on the **Chartfields/Distributions** icon

The following **Message** may appear:

16. Click **No** if you've already updated the PO Qty & Price

The **Distributions for Schedule 1** page displays:

17. In the Distribute by field **Quantity** defaults in. You can change this to **Amount** by clicking on the down arrow. If Quantity is selected, each distribution line is distributed by quantity. If Amount is selected each distribution line is distributed by amount

18. Enter Chartfield information

19. Click **OK**

The **Schedules** page displays:

Maintain Purchase Order

**Schedules**

Unit 01110      Supplier PRESIDIONE-001      PO Status Open  
PO ID NEXT      PO Date 12/13/2018

[Return to Main Page](#)

**Lines**      Find [View All](#)      First 1 of 2 Last

Line	Item	Rubrik Back Up	PO Qty	5.0000	EA	Merchandise Amt	50.00 USD
<b>Schedules</b> Personalize   Find   <a href="#">View All</a>   First 1 of 1 Last							
<a href="#">Details</a>   <a href="#">Statuses</a>   <a href="#">Shipment</a>   <a href="#">Matching</a>   <a href="#">Receiving</a>   <a href="#">Freight</a>   <a href="#">RTV</a>							
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status	
1	12/13/2018	PFMMTP002	5.0000	10.00000	50.00	Active	

Add ShipTo Comments

[Save](#)   [Notify](#)   [Refresh](#)      [Add](#)   [Update/Display](#)

If there are more rows, click the **View All** link to see all schedules or click the **next arrow** to see only the next schedule for updating. Once you have updated all schedules and distributions

## 20. Click **Save**

The following **Message** may appear for each line of the PO:

**Message**

Warning -- Price on line 1, schedule 1 does not balance to sum of value adjustments for the schedule. (10200,4)

The price on the specified schedule does not match the sum of value adjustments for that schedule where the impact type of the value adjustments are Price and the adjustment will be applied.

[OK](#)   [Cancel](#)

## 21. Click **OK**

The PO has been saved and assigned a PO ID number:

Maintain Purchase Order

**Schedules**

Unit 01110      Supplier PRESIDIONE-001      PO Status Open  
**PO ID 0000000957**      PO Date 12/13/2018

[Return to Main Page](#)

**Lines**      Find | [View All](#)      First 1 of 2 Last

Line	Item	Rubrik Back Up	PO Qty	5000.0000	EA	Merchandise Amt	50.00 USD
<b>Schedules</b> Personalize   Find   <a href="#">View All</a>   First 1 of 1 Last							
<a href="#">Details</a>   <a href="#">Statuses</a>   <a href="#">Shipment</a>   <a href="#">Matching</a>   <a href="#">Receiving</a>   <a href="#">Freight</a>   <a href="#">RTV</a>							
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status	
1	12/13/2018	PFMMTP002	5000.0000	0.01000	50.00	Active	

Add ShipTo Comments

[Save](#)   [Notify](#)   [Refresh](#)      [Add](#)   [Update/Display](#)

## 22. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

Purchase Order

Business Unit 01110  
PO ID 0000000957

PO Status Open  
Budget Status Not Chk'd

Copy From

Hold From Further Processing

Header

\*PO Date 12/13/2018  
\*Supplier PRESIDIONE-001  
\*Supplier ID 0000294841  
\*Buyer ETEST

Supplier Search  
Supplier Details  
Presidio Networked Solutions  
Ella Test

PO Reference Rubrik Back Up Solution

Header Details  
PO Defaults  
PO Activities  
Actions

Activity Summary  
Add Comments  
Add ShipTo Comments

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print

Dispatch

Amount Summary

Merchandise 100.00  
Freight/Tax/Misc. 0.00  
Total Amount 100.00 USD

Calculate

Add Items From

Catalog  
Purchasing Kit

Item Search

Lines

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Rubrik Back Up	5000.0000	EA	20584	0.01000	50.00	Approved
2		Rubrik Back up Service	5000.0000	EA	00101	0.01000	50.00	Approved

View Printable Version

Close Short All Lines

\*Go to ... More ...

Save Notify Refresh

Add Update/Display

**Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).**

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

### Copying a Purchase Order from a Contract is Complete

## Enter an Express Purchase Order

**Situations when this function is used:** The entry of an express purchase order is simplified and therefore faster to enter than a regular PO. It may be used if a vendor is requiring a purchase order before you can place an order.

**Note:** An Express Purchase Order cannot be used in a PO Voucher and does not draw down on a contract.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Express Purchase Orders

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update Express POs

The Express Purchase Order page displays:

The screenshot shows the 'Express Purchase Order' form. At the top, there are three buttons: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below these, there are two input fields: 'Business Unit' with the value '02300' and a search icon, and 'PO ID' with the value 'NEXT'. At the bottom of the form, there is a yellow 'Add' button, which is highlighted with a red rectangle.

1. **Business Unit** - Accept default or enter a valid Business Unit
2. **PO ID** - Leave as NEXT
3. Click **Add**

The Express Purchase Order page displays:

The screenshot shows the full 'Express Purchase Order' page. The header section includes fields for 'Business Unit' (02300), 'PO ID' (NEXT), 'Copy From', 'PO Status' (Open), 'Budget Status' (Not Chk'd), and 'Hold From Further Processing'. There are also links for 'Supplier Search', 'Supplier Details', 'Supplier ID', and 'Buyer'. The 'Amount Summary' section shows 'Merchandise' (0.00), 'Freight/Tax/Misc.' (0.00), and 'Total Amount' (0.00 USD). The 'Lines' section shows a table with columns for Line, Item, Description, PO Qty, \*UOM, Category, Merchandise Amt, and Status. The first line is visible with a status of 'Approved'. At the bottom, there are buttons for 'Save', 'Notify' (highlighted with a red rectangle), 'Refresh', 'Add', and 'Update/Display'.

4. **Supplier ID** - Enter the **Supplier ID** (be sure to include the leading zeros)
5. **Buyer** - Enter **Buyer ID**
6. Click **Refresh**
7. Click on the **Header Details** link



The **PO Header Details** page displays:

**PO Header Details**

**PO Details**

Supplier IRVING ENE-002 PO Date 10/12/2018  
 \*PO Type PROD Budget Status Not Chk'd  
 \*Billing Location PDLCMTP Billing Address  
 Origin DLC Letter of Credit ID  
☐ Use One Ship To Ship To

**Currency**

Currency Code USD Exchange Rate Detail Base Currency USD  
 Rate Date 10/12/2018 Exchange Rate 1.00000000  
 Rate Type CRRNT

**Process Control Option**

☒ Dispatch Acknowledgements required for Not required  
 \*Method Print Accounting Date 10/12/2018  
 Template ID Accounting Template STANDARD

OK Cancel Refresh

8. Enter the **PO Type** by clicking on the [Magnifying Glass](#)

9. Enter the **Origin** by clicking on the [Magnifying Glass](#)

10. Click **OK**

The **Express Purchase Order** page displays:

**Express Purchase Order**

**Purchase Order**

Business Unit 02300 PO ID NEXT PO Status Open Budget Status Not Chk'd  
 Copy From Hold From Further Processing

**Header**

\*PO Date 10/12/2018 Supplier Search  
 \*Supplier IRVING ENE-002 Supplier Details  
 \*Supplier ID 0000001293 Irving Energy  
 \*Buyer KSYMONDS Karen L Symonds  
 PO Reference

Doc Tot Status Valid Receipt Status Not Recvd  
 \*Dispatch Method Print Dispatch

**Amount Summary**

Merchandise 0.00  
 Freight/Tax/Misc. 0.00 Calculate  
 Total Amount 0.00 USD

**Add Items From**

Catalog Item Search  
 Purchasing Kit

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1						0.000	Approved

254 characters remaining

Expand All Collapse All  
 View Printable Version

Go to ... More ...

Save Notify Refresh Add Update/Display

11. Click on the **Expand All** link

The **Schedule & Distribution** sections are expanded so that you can see them along with the PO Line information:

The screenshot displays the 'Express Purchase Order' form. The 'Purchase Order' header section includes fields for Business Unit (02300), PO ID (NEXT), PO Status (Open), Budget Status (Not Chk'd), and a 'Hold From Further Processing' checkbox. The 'Header' section contains fields for \*PO Date (10/12/2018), \*Supplier (IRVING ENE-002), \*Supplier ID (0000001293), and \*Buyer (KSYMOMDS). The 'Amount Summary' section shows Merchandise (8.60), Freight/Tax/Misc. (0.00), and Total Amount (8.60 USD). The 'Lines' section is highlighted with a red box and contains a table with columns: Line, Item, Description, PO Qty, \*UOM, Category, Merchandise Amt, and Status. The first line is highlighted with a green box and contains the following data: Line 1, Item 000000000000008661, Description LIQUID PROPANE - GAS, PO Qty 860.0000, \*UOM GAL, Category 40506, Merchandise Amt 8.60, and Status Approved. Below the 'Lines' section, the 'Schedules' and 'Distributions' sections are expanded. The 'Schedules' section shows a table with columns: Sched, \*Due Date, \*Ship To, \*PO Qty, Price, Merchandise Amt, Status, and \*Distribute by. The first schedule is highlighted with a green box and contains the following data: Sched 1, \*Due Date 11/11/2018, \*Ship To, \*PO Qty 860.0000, Price 0.01000, Merchandise Amt 8.60, Status Active, and \*Distribute by Quantity. The 'Distributions' section shows a table with columns: Dist, Status, Percent, PO Qty, Merchandise Amt, Curr, \*GL Unit, \*Account, Fund, Dept, Program, and Class. The first distribution is highlighted with a green box and contains the following data: Dist 1, Status Open, Percent 100.0000, PO Qty 860.0000, Merchandise Amt 8.60, Curr USD, \*GL Unit 02300, \*Account 521200, Fund, Dept, Program, and Class. At the bottom of the form, there are buttons for Save, Notify, Refresh, Add, and Update/Display.

12. Enter the **PO Line** information (Item# - if applicable, Description, PO Qty, UOM, and Category)

13. Click **Refresh**

The **Due Date** defaults in as 30 days from the current date. **Account** number defaults in based on Category.

14. Enter the **Ship To** location and **Price**, **Distribute By** defaults to **Quantity** you can change this to **Amount** by clicking on the down arrow. If Quantity is selected, each distribution line is distributed by quantity. If Amount is selected each distribution line is distributed by amount.

15. Click **Refresh**

Amount populates in both the lines and schedule page:

Express Purchase Order  
Purchase Order

Business Unit 02300  
PO ID NEXT

Copy From

PO Status Open  
Budget Status Not Chk'd

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print

Amount Summary

Merchandise	8.60
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	<b>8.60 USD</b>

Calculate

Add Items From

Catalog  
Purchasing Kit

Item Search

Lines

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1	00000000000008661	LIQUID PROPANE - GAS	860.0000	GAL	40506	8.60	Approved

234 characters remaining

Schedules

Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amt	Status	*Distribute by
1	11/11/2018	PDLCTP001	860.0000	0.01000	8.60	Active	Quantity

Distributions

Dist	Status	Percent	PO Qty	Merchandise Amt	Curr	*GL Unit	*Account	Fund	Dept	Program	Class
1	Open	100.0000	860.0000	8.60	USD	02300	521200				

Expand All  
View Printable Version

Go to ... More ...

Save Notify Refresh Add Update/Display

16. Enter all appropriate **Chartfield** information

17. Click **Save**

The PO has been saved and assigned a PO ID number:

Express Purchase Order  
Purchase Order

Business Unit 02300  
PO ID 0000004446

Copy From

PO Status Open  
Budget Status Not Chk'd

Hold From Further Processing

**Note: If you expect to post multiple vouchers against the PO, please follow steps 49 through 52 in the [Enter a PO Against a Contract exercise](#).**

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

**Entering an Express Purchase Order is Complete**

## Create a Change Order for a PO

**Situations when this function is used:** To make any changes to the line information on a purchase order.

**Note:** *If the PO is not in a Dispatched status the change order icon will not be available. It is recommended that the line, schedule, and distribution pages always be reviewed after making any changes to a PO.*

**WorkCenter Navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** tab

The screenshot shows the 'Purchase Order' search interface. At the top, there are two tabs: 'Find an Existing Value' (which is selected and highlighted in blue) and 'Add a New Value'. Below the tabs is a section titled 'Search Criteria' with a dropdown arrow. The search criteria include several fields: 'Business Unit' (a dropdown menu set to a default value), 'PO ID' (a text field with 'begins with' and '0000000925'), 'Purchase Order Date' (a date picker), 'PO Status' (a dropdown menu), 'Short Supplier Name' (a text field with 'begins with'), 'Supplier ID' (a text field with 'begins with'), 'Supplier Name' (a text field with 'begins with'), 'Buyer' (a text field with 'begins with'), 'Buyer Name' (a text field with 'begins with'), 'PO Type' (a dropdown menu), and 'Purchase Order Reference' (a text field with 'begins with'). Below these fields are three checkboxes: 'Hold From Further Processing', 'Case Sensitive', and 'Limit the number of results to (up to 300):' (set to 300). At the bottom, there are four buttons: 'Search' (highlighted with a red box), 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria' (with a floppy disk icon).

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter the PO ID # - be sure to include the leading zero's
3. Click **Search**

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110  
PO ID 0000000925  
Copy From [ ]

PO Status Dispatched  
Budget Status Valid  
Hold From Further Processing

**Header**

\*PO Date 04/27/2018  
\*Supplier WBMASONCOI-001  
\*Supplier ID 0000283240  
PO Reference Office Supplies

Supplier Search  
Supplier Details  
W.B. Mason Co., Inc.  
In Ann Touchette

Doc Tot Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print

**Amount Summary**

Merchandise	27.40
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	27.40 USD
Encumbrance Balance	0.00 USD

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		OFFICE SUPPLIES	1.0000	EA	61599	27.40000	27.40	Approved

- Click on the **Change Order** icon. This will allow changes to be made on all PO lines.

**Note:** When you use the **Expand** icon in the Lines section of the page, you will see more change order icons. These icon(s) can be used in place of the one at the top of the Maintain Purchase Order page. Using the one under Lines will only allow you to adjust Line 1 of a PO. If the PO has several lines this would have to be done for each line.

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Due Date	Ship To	Price	Status	Backorder Status
1		OFFICE SUPPLIES	1.0000	EA	61599	27.40000	27.40	Approved	04/27/2018	PFMMTP001	27.40000	Approved	Not Backordered

**Refresh**

- Make the necessary changes
- Click **Refresh**

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110  
PO ID 0000000925  
Copy From [ ]

PO Status Dispatched  
Budget Status Valid  
Hold From Further Processing

**Header**

\*PO Date 04/27/2018  
\*Supplier WBMASONCOI-001  
\*Supplier ID 0000283240  
PO Reference Office Supplies

Supplier Search  
Supplier Details  
W.B. Mason Co., Inc.  
Caitlin Ann Touchette

Doc Tot Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print

**Amount Summary**

Merchandise	27.40
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	27.40 USD
Encumbrance Balance	0.00 USD

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		OFFICE SUPPLIES	1.0000	EA	61599	27.40000	27.40	Approved

- Click on the **Add Comments** link

The **PO Header Comments** page displays:

8. Enter comments referencing which change order number it was, what was changed, the date the change was made, and who completed the change order

9. Click **OK**

You are returned to the **Maintain Purchase Order** page:

10. Click on the **Header Details** link

11. Change the **Accounting Date** field to the current date

12. Click **OK**

You are returned to the **Maintain Purchase Order** page:

13. Click **Save** once all changes have been completed

The following **Message** may open: –

14. Click **OK**

The **Schedules** page will display with applicable changes to the PO:

15. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110  
PO ID 0000000925  
**Change Order 1**  
Copy From [ ]  
Hold From Further Processing ☐

**Header**

\*PO Date 04/27/2018  
\*Supplier WBMASONCOI-001  
\*Supplier ID 0000283240  
\*Buyer CTOUCHET  
Office Supplies  
Header Details  
PO Defaults  
PO Activities  
Requisitions  
Actions

Supplier Search  
Supplier Details  
W.B. Mason Co., Inc.  
Caitlin Ann Touchette

Doc Tol Status Valid  
Receipt Status Not Recvd  
\*Dispatch Method Print  
Dispatch

**Amount Summary**

Merchandise	30.00	
Freight/Tax/Misc.	0.00	
Total Amount	30.00	USD
Encumbrance Balance	0.00	USD

Calculate

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines Line [ ] To [ ] Retrieve

**Lines**

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		OFFICE SUPPLIES	1.0000	EA	61599	30.00000	30.00	Approved

View Printable Version  
Close Short All Lines  
\*Go to ... More ...

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

The **Change Order** field is now 1, the **PO Status** changed to Open, and the **Budget Status** is Not Chk'd.

Follow specific controls in place in your department for approval and budget checking.

A purchase order must be dispatched in order to be used in a voucher. The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

### Creating a Change Order to a PO Line is Complete



## Create a Change to a PO - Schedule

**Situations when this function is used:** To make any changes to the Purchase Order Schedule area.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** tab:

**Purchase Order**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value** | Add a New Value

**Search Criteria**

Business Unit = 01110  
PO ID begins with 0000000921  
Purchase Order Date =  
PO Status =  
Short Supplier Name begins with  
Supplier ID begins with  
Supplier Name begins with  
Buyer begins with  
Buyer Name begins with  
PO Type =  
Purchase Order Reference begins with

☐ Hold From Further Processing  
☐ Case Sensitive  
Limit the number of results to (up to 300): 300

**Search** | Clear | Basic Search | Save Search Criteria

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter a PO ID number
3. Click **Search**

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**  
**Purchase Order**

Business Unit 01110  
PO ID 0000000921  
Copy From  
PO Status Dispatched  
Budget Status Valid  
Hold From Further Processing

**Header**

\*PO Date 03/28/2018  
\*Supplier WBMASONCOI-001  
\*Supplier ID 0000283240  
PO Reference Office Supplies

Supplier Search  
Supplier Details  
W.B. Mason Co., Inc.  
lin Ann Touchette

Doc Tot Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print

**Amount Summary**

Merchandise	13.85
Freight/Tax/Misc.	0.00
Total Amount	13.85 USD
Encumbrance Balance	0.00 USD

**Add Items From**  
Catalog | Item Search

**Select Lines To Display**  
Search for Lines | Line | To | Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	OFFICE SUPPLIES		1.0000	EA	61599	13.85000	13.85	Approved

**Footer**  
View Printable Version | Close Short All Lines | \*Go to ... More ... | Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

4. Click on the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

**Schedules**

Unit 01110 Supplier WBMASONCOI-001 PO Status Dispatched  
PO ID 0000000921 PO Date 03/28/2018

[Return to Main Page](#)

**Lines** Find | View All First 1 of 1 Last

Line	Item	OFFICE SUPPLIES	PO Qty	1.0000 EA	Merchandise Amt	13.85 USD														
<p><b>Schedules</b> Personalize   Find   View All   First 1 of 1 Last</p> <p>Details   Statuses   Shipment   Matching   Receiving   Freight   RTV</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>03/28/2018</td> <td>PFMMTP001</td> <td>1.0000</td> <td>13.85000</td> <td>13.85</td> <td>Active</td> </tr> </tbody> </table>							Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status	1	03/28/2018	PFMMTP001	1.0000	13.85000	13.85	Active
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status														
1	03/28/2018	PFMMTP001	1.0000	13.85000	13.85	Active														

Add Ship To Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

5. Click on the **Schedule Details** icon

The **Details for Schedule 1** page displays:

Details for Schedule 1 Help

Unit 01110 Supplier WBMASONCOI-001  
PO ID 0000000921 Item OFFICE SUPPLIES  
Line 1  
Schedule 1 Status Active

**Schedule Details**

Due Date 03/28/2018  
Time Due  
Ship To PFMMTP001

Original Promise Date 03/28/2018  
Ship Date  
Ship Via  
Freight Terms FOBDEST Destination  
Attention To  
Distribute By Quantity

☒ Custom Price - No Override  
☐ Zero Price Indicator No Charge

**Amount Summary**

Schedule Qty	1.0000
Merchandise Amt	13.85 USD
Doc. Base Amount	13.85 USD

Expand All Collapse All

Matching Controls  
Receiving Controls  
Freight Calculation Rule  
Return To Vendor / Supplier

OK Cancel Refresh

6. Click on the **Create Schedule Change** icon

Data fields are now open, you can make the needed changes – in this example the Ship To location will be changed:

Maintain Purchase Order  
Schedules

Unit 01110 Supplier WBMASONCOI-001 PO Status Dispatched  
PO ID 0000000921 PO Date 03/28/2018

Return to Main Page

Line	Item	OFFICE SUPPLIES	PO Qty	1.0000 EA	Merchandise Amt	13.85 USD
<p>Schedules</p> <p>Details   Statuses   Shipment   Matching   Receiving   Freight   RTV   <b>PFMMTP001</b></p> <p>Personalize   Find   View All   First   1 of 1   Last</p>						
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	03/28/2018	PFMMTP001	1.0000	13.85000	13.85	Active

Add ShipTo Comments

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

7. Change the **Ship To** location

8. Click **Save**

The **PO Status** has changed to **Open** and the **Change Order** is now **1**:

Maintain Purchase Order  
Schedules

Unit 01110 Supplier WBMASONCOI-001 PO Status Open  
PO ID 0000000921 PO Date 03/28/2018 Change Order 1

Return to Main Page

Line	Item	OFFICE SUPPLIES	PO Qty	1.0000 EA	Merchandise Amt	13.85 USD
<p>Schedules</p> <p>Details   Statuses   Shipment   Matching   Receiving   Freight   RTV   <b>PFMMTP002</b></p> <p>Personalize   Find   View All   First   1 of 1   Last</p>						
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	03/28/2018	PFMMTP002	1.0000	13.85000	13.85	Active

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display

9. Click on the **Return to Main Page** link

You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order  
Purchase Order

Business Unit 01110 PO Status Open  
PO ID 0000000921 Budget Status Valid  
Change Order 1

Copy From [ ] Hold From Further Processing

Header

\*PO Date 03/28/2018 Supplier Search Doc Tot Status Valid  
\*Supplier WBMASONCOI-001 Supplier Details Backorder Status Not Backordered Create BackOrder  
\*Supplier ID 0000283240 W.B. Mason Co., Inc. Receipt Status Not Recvd  
PO Reference Office Supplies TC Caitlin Ann Touchette \*Dispatch Method Print Dispatch

Amount Summary

Merchandise	13.85	
Freight/Tax/Misc.	0.00	
Total Amount	13.85	USD
Encumbrance Balance	0.00	USD

Calculate

Add Items From [ ] Select Lines To Display [ ]  
Catalog Item Search Search for Lines Line [ ] To [ ] Retrieve

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		OFFICE SUPPLIES	1.0000	EA	61599	13.85000	13.85	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

10. Click on the **Add Comments** link

The **PO Header Comments** page displays:

11. Click the **+** icon if you need to add a Comment

12. Enter information about the change (i.e. change order #, what was changed, date of the change, and who completed the change)

13. Click **OK**

The **Maintain Purchase Order** page displays:

14. Click on the **Header Details** link

The **PO Header Details** page displays:

**PO Header Details**

**PO Details**

Supplier: WBMASONCOI-001 PO Date: 03/28/2018  
 \*PO Type: PROD Budget Status: Valid  
 \*Billing Location: PFMMP000 Billing Address: ID:   
 Origin: FM Letter of Credit ID:   
☐ Use One Ship To Ship To: PFMMP002

**Currency**

Currency Code: USD Exchange Rate Detail: Base Currency: USD  
 Rate Date: 01/01/1900 Exchange Rate: 1.00000000  
 Rate Type: CRRNT

**Process Control Option**

☒ Dispatch Acknowledgements required for: Not required  
 \*Method: Print Accounting Date: 11/09/2018  
 Template ID: Accounting Template: STANDARD

15. Update the **Accounting Date** to the current date

16. Click **OK**

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 01110 PO ID: 0000000921  
 Change Order: 1 Copy From:   
 PO Status: Open Budget Status: Not Chk'd  
☐ Hold From Further Processing

**Header**

\*PO Date: 03/28/2018 Supplier Search: Doc Tot Status: Valid  
 \*Supplier: WBMASONCOI-001 Supplier Details: Backorder Status: Not Backordered  
 \*Supplier ID: 0000283240 W.B. Mason Co., Inc. Create BackOrder  
 \*Buyer: CTOUCHET Caitlin Ann Touchette Receipt Status: Not Recvd  
 \*Dispatch Method: Print Dispatch

PO Reference:   
 Header Details Activity Summary  
 PO Defaults Edit Comments  
 PO Activities Add Ship To Comments  
 Requisitions Document Status  
 Actions

**Amount Summary**

Merchandise	13.85	
Freight/Tax/Misc.	0.00	
Total Amount	13.85	USD
Encumbrance Balance	0.00	USD

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines Line To Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		OFFICE SUPPLIES	1.0000	EA	61599	13.85000	13.85	Approved

View Printable Version Close Short All Lines \*Go to ... More ...

17. Click **Save**

It is important that you follow specific controls in place in your department for approval and budget checking.

Once the PO has been approved, the page **must** be saved. The Dispatch button remains grayed out until the page has been saved, the PO must have a status of Dispatched to be used in a voucher.

The Dispatch process runs daily in overnight batch processing or you can manually dispatch purchase orders. Instructions on how to dispatch purchase orders manually can be found in the [Purchase Orders 102 manual](#).

## Creating a Change Order to a PO Schedule is Complete

## Create a Change to a PO - Distribution

**Situations when this function is used:** The Chartfield information on the PO is incorrect needs to be corrected.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** tab:

**Purchase Order**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

**Search Criteria**

Business Unit = 01110

PO ID begins with 0000000957

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

PO Type =

Purchase Order Reference begins with

☐ Hold From Further Processing

☐ Case Sensitive

Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

1. **Business Unit** - Accept default or enter a valid BU
2. **PO ID** - Enter a PO ID number
3. Click **Search**

The **Maintain Purchase Order** page displays:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110

PO ID 0000000957

Copy From

PO Status Approved

Budget Status Valid

☐ Hold From Further Processing

**Header**

\*PO Date 12/13/2018

\*Supplier PRESIDIONE-001

\*Supplier ID 0000294841

\*Buyer ETEST

PO Reference Rubrik Back Up Solution

Supplier Search

Supplier Details

Presidio Networked Solutions

Ella Test

Doc Tot Status Valid

Receipt Status Not Recvd

\*Dispatch Method Print

[Dispatch](#)

**Amount Summary**

Merchandise	100.00	
Freight/Tax/Misc.	0.00	
Total Amount	100.00	USD
Encumbrance Balance	100.00	USD

[Calculate](#)

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines

Line To Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status	Action
1		Rubrik Back Up	5000.0000	EA	20584	0.01000	50.00	Approved	
2		Rubrik Back up Service	5000.0000	EA	00101	0.01000	50.00	Approved	

[View Printable Version](#)

[Close Short All Lines](#)

\*Go to ... More ...

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

4. Click on the **Schedule** icon

The **Schedules** page displays:

Maintain Purchase Order

**Schedules**

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved  
PO ID 0000000957 PO Date 12/13/2018

Return to Main Page

**Lines** Find | View All First 1 of 2 Last

Line	1	Item	Rubrik Back Up	PO Qty	5000.0000	EA	Merchandise Amt	50.00 USD														
<p><b>Schedules</b> Personalize   Find   View All   First 1 of 1 Last</p> <p>Details   Statuses   Shipment   Matching   Receiving   Freight   RTV</p> <table border="1"> <thead> <tr> <th>Sched</th> <th>*Due Date</th> <th>*Ship To</th> <th>*PO Qty</th> <th>Price</th> <th>Merchandise Amount</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>12/13/2018</td> <td>PFMMTP002</td> <td>5000.0000</td> <td>0.01000</td> <td>50.00</td> <td>Active</td> </tr> </tbody> </table>									Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status	1	12/13/2018	PFMMTP002	5000.0000	0.01000	50.00	Active
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status																
1	12/13/2018	PFMMTP002	5000.0000	0.01000	50.00	Active																

Add ShipTo Comments

Save Return to Search Notify Refresh Add Update/Display

5. Click on the **Chartfield/Distributions** icon

The **Distribution for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001  
PO ID 0000000957 Item Rubrik Back Up  
Line 1  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000  
Merchandise Amount 50.00 USD  
Doc. Base Amount 50.00 USD

**Distribution** Personalize | Find | View All | First 1 of 1 Last

Chartfields | Details/Tax | Asset Information | Req Detail | Statuses | Budget Information

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	Project
1	Open	100.0000	5000.000	50.00	USD	01110	521600	10000	1110003000			

OK Cancel Refresh

6. Click the **+** icon on the far right of the distribution to add additional rows

The following **Message** opens:

fintraining.erp.vermont.gov says

Enter number of rows to add:

1

OK Cancel

7. Enter the number of rows you wish to add

8. Click **OK**

A new line is added:

Unit 01110 Supplier PRESIDIONE-001  
PO ID 0000000957 Item Rubrik Back Up  
Line 1  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000  
Merchandise Amount 50.00 USD  
Doc. Base Amount 50.00 USD

**Distribution** Personalize Find View All First 1-2 of 2 Last

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

Dist	Status	Percent	*Account	Fund	Dept	Program	Class	Project	Affiliate
1	Open	100.0000	521600	10000	1110003000				
2	Open								

OK Cancel Refresh

9. Enter the correct Chartfield information in the new distribution line

10. Click on the **Statuses** tab

Unit 01110 Supplier PRESIDIONE-001  
PO ID 0000000957 Item Rubrik Back Up  
Line 1  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000  
Merchandise Amount 50.00 USD  
Doc. Base Amount 50.00 USD

**Distribution** Personalize Find View All First 1-2 of 2 Last

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

Dist	Status	Percent	Chartfield Status	Peg Status
1	Open	100.0000	Valid	Not Pegged
2	Open		Valid	Not Pegged

OK Cancel Refresh

11. Click the Red X to cancel the original distribution line

The **Status** for Line 1 changes from Open to **Cancelled**:

Unit 01110 Supplier PRESIDIONE-001  
PO ID 0000000957 Item Rubrik Back Up  
Line 1  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000  
Merchandise Amount 50.00 USD  
Doc. Base Amount 50.00 USD

**Distribution** Personalize Find View All First 1-2 of 2 Last

Chartfields Details/Tax Asset Information Req Detail **Statuses** Budget Information

Dist	Status	Percent	Chartfield Status	Peg Status
1	Canceled	100.0000	Valid	Not Pegged
2	Open	100.00	Valid	Not Pegged

OK Cancel Refresh

12. Click **OK**



The **Schedules** page displays:






Maintain Purchase Order

### Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved  
PO ID 0000000957 PO Date 12/13/2018

[Return to Main Page](#)

**Lines** Find | View All First 1 of 2 Last

Line	Item	Rubrik Back Up	PO Qty	5000.0000	EA	Merchandise Amt	50.00 USD
<b>Schedules</b> Personalize   Find   View All   First 1 of 1 Last							
<a href="#">Details</a> <a href="#">Statuses</a> <a href="#">Shipment</a> <a href="#">Matching</a> <a href="#">Receiving</a> <a href="#">Freight</a> <a href="#">RTV</a>							
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status	
1	12/13/2018	PFMMTP002	5000.0000	0.01000	50.00	Active	    

Add ShipTo Comments

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

13. Click on the **Distributions/Chartfields** icon

The **Distributions for Schedule 1** page displays:

Distributions for Schedule 1

Unit 01110 Supplier PRESIDIONE-001  
PO ID 0000000957 Item Rubrik Back Up  
Line 1  
Schedule 1 Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 5000.0000  
Merchandise Amount 50.00 USD  
Doc. Base Amount 50.00 USD

**Distribution** Personalize | Find | View All | First 1-2 of 2 Last

[Chartfields](#) [Details/Tax](#) [Asset Information](#) [Req Detail](#) [Statuses](#) [Budget Information](#)

Dist	Status	Percent	PO Qty	Merchandise Amount	Currency	*GL Unit	*Account	Fund	Dept	Program	Class	Project
1	Canceled	100.0000	5000.0000	50.00	USD	01110	521600	10000	1110003000			
2	Open	100.0000	5000.0000	50.00	USD	01110	522300	10000	1110003000			

[OK](#) [Cancel](#) [Refresh](#)

14. If you haven't already, enter the percentage in the new distribution line, once you tab out of the field the amount will default in

15. Click **OK**

The **Schedules** page displays:

Maintain Purchase Order

### Schedules

Unit 01110 Supplier PRESIDIONE-001 PO Status Approved  
PO ID 0000000957 PO Date 12/13/2018

[Return to Main Page](#)

16. Click on the **Return to Main Page** link

The **Maintain Purchase Order** page displays:

Maintain Purchase Order

**Purchase Order**

Business Unit 01110  
PO ID 000000957

Copy From [ ]

PO Status Approved  
Budget Status Not Chk'd

Hold From Further Processing

Header ?

\*PO Date 12/13/2018  
\*Supplier PRESIDIONE-001  
\*Supplier ID 0000294841  
\*Buyer ETEST

Supplier Search  
Supplier Details  
Presidio Networked Solutions  
Ella Test

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print

Dispatch

PO Reference Rubrik Back Up Solution

Header Details  
PO Details  
PO Activities  
Requisitions  
Actions

Activity Summary  
Add Comments  
Add ShipTo Comments  
Document Status

Amount Summary ?

Merchandise 100.00  
Freight/Tax/Misc. 0.00  
Total Amount 100.00 USD  
Encumbrance Balance 100.00 USD

Calculate

Add Items From ?

Catalog Item Search

Select Lines To Display ?

Search for Lines Line [ ] To [ ] Retrieve

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Rubrik Back Up	5000.0000	EA	20584	0.01000	50.00	Approved
2		Rubrik Back up Service	5000.0000	EA	00101	0.01000	50.00	Approved

View Printable Version

Close Short All Lines

\*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display

17. Click on the **Header Details** link

The **PO Header Details** page displays:

PO Header Details

PO Details

Supplier PRESIDIONE-001  
\*PO Type GEN  
\*Billing Location PFMMTPO01  
Origin FM  
Use One Ship To

PO Date 12/13/2018  
Budget Status Not Chk'd  
Tax Exempt  
ID  
Letter of Credit ID  
Ship To PFMMTPO02

Currency

Currency Code USD  
Rate Date 01/01/1900  
Rate Type CRRNT

Base Currency USD  
Exchange Rate 1.00000000

Process Control Option

Dispatch  
\*Method Print  
Template ID

Acknowledgements required for Not required

Accounting Date 12/13/2018  
Accounting Template STANDARD

OK Cancel Refresh

18. Change the accounting date to the current date, if it isn't already

19. Click **OK**

You are brought back to the **Maintain Purchase Order** page:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110  
PO ID 0000000957

PO Status: Approved  
Budget Status: Not Chk'd

Copy From: [Dropdown]  
Hold From Further Processing: [Checkbox]

**Header**

\*PO Date: 12/13/2018  
\*Supplier: PRESIDIONE-001  
\*Supplier ID: 0000294841  
\*Buyer: ETEST  
PO Reference: Rubrik Back Up Solution

Supplier Search  
Supplier Details  
Presidio Networked Solutions  
Ella Test

Doc Tol Status: Valid

Receipt Status: Not Recvd  
\*Dispatch Method: Print  
Dispatch

**Amount Summary**

Merchandise: 100.00  
Freight/Tax/Misc.: 0.00  
Total Amount: 100.00 USD  
Encumbrance Balance: 100.00 USD

Calculate

**Add Items From**

Catalog  
Item Search

**Select Lines To Display**

Search for Lines  
Line: [Input] To: [Input]  
Retrieve

**Lines**

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	Rubrik Back Up	Rubrik Back Up	5000.0000	EA	20584	0.01000	50.00	Approved
2	Rubrik Back up Service	Rubrik Back up Service	5000.0000	EA	00101	0.01000	50.00	Approved

View Printable Version  
Close Short All Lines  
\*Go to: ... More ...

Save | Return to Search | Notify | Refresh | Add | Update/Display

20. Click on the **Add Comments** link

The **PO Header COMMENTS** page displays:

**PO Header COMMENTS**

Business Unit 01110  
PO ID 0000000957  
Supplier PRESIDIONE-001

☒ Retrieve Active Comments Only  
Retrieve

\*Sort Method: Comment Time Stamp  
\*Sort Sequence: Ascending  
Sort

**Comments**

Find | View All | First | 1 of 1 | Last

Use Standard Comments  
Comment Status: Active  
Inactivate | +

Needed to change chartfield account information on distribution line two - 12/13/18 (ET)

☐ Send to Supplier  
☐ Show at Receipt  
☐ Show at Voucher

**Associated Document**

Attachment  
Attach | View | Delete | Email

From -> PO 01110-0000000957

OK | Cancel | Refresh

21. Enter information about the change (i.e. change order number, what was changed, date of the change, and who completed the change.) If you need additional space, click the + icon and enter the information

22. Click **OK**

You are returned to the **Maintain Purchase Order** page:

**Maintain Purchase Order**

**Purchase Order**

Business Unit 01110  
PO ID 0000000957

PO Status: Approved  
Budget Status: Not Chk'd

Copy From: [Dropdown]

**Header**

\*PO Date: 12/13/2018  
\*Supplier: PRESIDIONE-001  
\*Supplier ID: 0000294841  
\*Buyer: ETEST

Supplier Search  
Supplier Details  
Presidio Networked Solutions  
Ella Test

PO Reference: Rubrik Back Up Solution

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Doc Tol Status Valid

Receipt Status: Not Recvd  
\*Dispatch Method: Print

Dispatch

**Amount Summary**

Merchandise	100.00
Freight/Tax/Misc.	0.00
Total Amount	100.00 USD
Encumbrance Balance	100.00 USD

Calculate

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines Line To Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1		Rubrik Back Up	5000.0000	EA	20584	0.01000	50.00	Approved
2		Rubrik Back up Service	5000.0000	EA	00101	0.01000	50.00	Approved

View Printable Version

Close Short All Lines

\*Go to ... More ...

**Save** Return to Search Notify Refresh Add Update/Display

### 23. Click **Save**

**PO Budget Status** has changed to **Not Chk'd**.

It is important that you follow specific controls in place in your department for budget checking.

**Creating a Change Order to a PO Distribution is Complete**

## Print a Dispatched Purchase Order

**Situations when this function is used:** When you need to reprint a previously dispatched purchase order.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

The **Purchase Order** page displays, click on the **Find an Existing Value** tab:

**Purchase Order**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Keyword Search](#) | [Add a New Value](#)

**Search Criteria**

Business Unit = 02300  
PO ID begins with  
Purchase Order Date =  
PO Status = Dispatched  
Short Supplier Name begins with  
Supplier ID begins with  
Supplier Name begins with  
Buyer begins with  
Buyer Name begins with  
PO Type =  
Purchase Order Reference begins with

☐ Hold From Further Processing  
☐ Case Sensitive  
Limit the number of results to (up to 300): 300

**Search** | Clear | Basic Search | Save Search Criteria

1. **Business Unit** - Accept default or enter a valid BU
2. **PO Status** - Set to = **Dispatched**
3. Click **Search**
4. Select PO to print

The **Maintain Purchase Order** page displays, PO Status = Dispatched:

**Maintain Purchase Order**  
**Purchase Order**

Business Unit 02300  
PO ID 0000004534  
Copy From  
Hold From Further Processing

**Header**

\*PO Date 12/04/2018  
Supplier Search  
Doc Tol Status Valid  
Backorder Status Not Backordered  
Receipt Status Not Recvd  
\*Dispatch Method Print  
Dispatch

\*Supplier IRVING ENE-002  
Supplier Details  
\*Supplier ID 0000001293  
Irving Energy  
\*Buyer ETEST  
Ella Test

PO Reference Fuel Products

**Amount Summary**

Merchandise	125.00
Freight/Tax/Misc.	0.00
<b>Total Amount</b>	125.00 USD
Encumbrance Balance	125.00 USD

**Calculate**

**Add Items From**

Catalog  
Purchasing Kit

**Select Lines To Display**

Search for Lines Line To Retrieve

**Lines**

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	000000000000008661	LIQUID PROPANE - GAS	50.0000	GAL	40506	2.50000	125.00	Approved

**View Printable Version** | Close Short All Lines | \*Go to More ...

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add | Update/Display

5. Click on the **View Printable Version** link

The following **Message** opens:

**Message**


Do you want to print the purchase order with distribution details Yes / No. (10250,337)

Yes

No

6. Click **Yes**

Purchase order page is created as a PDF document including UNAUTHORIZED being embedded into the document signature box.

  
**State of Vermont**  
Department of Liquor Control  
13 Green Mountain Drive

**PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, DELIVERY MEMORANDA, BILLS OF LADING, PACKAGES AND CORRESPONDENCE.**

Purchase Order	Date	Revision	Page
02300-0000004445	08-30-2018		1
Payment Terms	Freight Terms	PO Status	Currency
	Destination	Dispatched	USD
Buyer	Phone		
Karen L Symonds	8280412		

**Supplier:** 0000001293  
Irving Energy  
190 Commerce Way  
Portsmouth NH 03801  
United States

**Ship To:** Department of Liquor Control  
13 Green Mountain Drive  
Montpelier VT 05602  
United States

**Bill To:** Department of Liquor Control  
13 Green Mountain Drive  
Montpelier VT 05602  
United States

Line-Sch	Description	Quantity	UOM	Unit Price	Extended Amt	Due Date
1 - 1	LIQUID PROPANE - GAS	860.00	GAL	0.01	8.60	09/29/2018

**DIST: 1**

Chartfield	Status	Percentage	PO Qty	Amount
	Open	100.0000	860.0000	8.600

GLUnit	Account	Fund	Dept
02300	520110	50300	2300007000

Subsidiary	BaseCurrency	Currency	Location	Consiged
8.600	USD	USD	POLMTP001	N

**Item Total**  
000000000000000  
8661

8.60

**Total PO Amount**

8.60

Unauthorized

**Printing a Dispatched Purchase Order is Complete**

## Print a Purchase Order for Authorized Signature

**Situations when this function is used:** You need to print a PO for authorized signature.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Purchase Order Add/Update

**Navigator Menu navigation:** Purchasing > Purchase Orders > Add/Update POs

Purchase Order needs to be in **Approved – PO Status** and **Valid – Budget Status**

Maintain Purchase Order

Purchase Order

Business Unit 01110  
PO ID 0000000959  
Copy From [v]

PO Status Approved  
Budget Status Valid

☐ Hold From Further Processing

Header ?

\*PO Date 01/23/2019 Supplier Search  
\*Supplier PRESIDIONE-001 Supplier Details  
\*Supplier ID 0000294841 Presidio Networked Solutions  
\*Buyer ETEST Ella Test  
PO Reference Rubrik Back Up Solution

Doc Tol Status Valid

Receipt Status Not Recvd  
\*Dispatch Method Print

Dispatch

Amount Summary ?

Merchandise	100.00	
Freight/Tax/Misc.	0.00	
Total Amount	100.00	USD
Encumbrance Balance	100.00	USD

Calculate

Header Details Activity Summary  
PO Defaults Add Comments  
PO Activities Add ShipTo Comments  
Requisitions Document Status  
Actions

1. Click on **Dispatch**

The **Dispatch Options** page displays:

Dispatch Options

☐ Use One Ship To Ship To PFMMTP002

Dispatch Options

Fax Cover Page [v]  
Server Name [v]  
\*Output Destination Type WEB  
Output Destination Format PDF  
Template ID [v]

☐ Test Dispatch  
☐ Print BU Comments  
☐ Print Duplicate on PO  
☐ Print Changes Only  
☒ Print PO Item Description  
☐ Print Copy

OK Cancel Refresh

2. Click **OK**

The following **Message** opens:

Message

Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)

Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.

Yes No



3. Click **Yes**


You are returned to the **Maintain Purchase Order** page:

Maintain Purchase Order


**Purchase Order**

Business Unit 01110  
PO ID 0000000959  
Copy From

PO Status **Dispatched**    
Budget Status Valid ☐ Hold From Further Processing

**Header** 

\*PO Date 01/23/2019 Supplier Search Doc Tol Status Valid  
\*Supplier PRESIDIONE-001 Supplier Details Backorder Status Not Backordered [Create BackOrder](#)  
\*Supplier ID 0000294841 Presidio Networked Solutions Receipt Status Not Recvd  
\*Buyer ETEST Ella Test \*Dispatch Method  [Dispatch](#)

PO Reference Rubrik Back Up Solution **Amount Summary** 

Header Details Activity Summary  
PO Defaults Add Comments  
PO Activities Add ShipTo Comments  
Requisitions Document Status  
[Actions](#)

Merchandise	100.00	
Freight/Tax/Misc.	0.00	<a href="#">Calculate</a>
Total Amount	100.00	USD
Encumbrance Balance	100.00	USD

**PO Status = Dispatched.**

You will now need to Navigate to the Report Manager to print the Purchase Order.

**WorkCenter Navigation:** Purchasing WorkCenter > Reports/Queries Tab > Reports/Processes > Report Monitoring > Report Manager

**Navigator Menu navigation:** Reporting Tools > Report Manager



The **Report Manager** page displays, click on the **Administration** tab:

List | Explorer | **Administration** | Archives

**View Reports For**

User ID ESTUBIN Type  Last  1 Days  [Refresh](#)

Status  Folder  Instance  to

**Report List** Personalize | Find | View All |   First 1-5 of 5 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	2619800	9473399	PO_DISPATCH - PO_DISPATCH.pdf	01/23/2019 2:41:23PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2619797	9473395	Comm. Cntrl. Budget Processor	01/23/2019 2:15:14PM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2619776	9473374	AMR_JGEN	01/23/2019 12:28:44PM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2619772	9473370	PS/AP Voucher Posting	01/23/2019 12:09:10PM	Text Files (*.txt)	Posted	<a href="#">Details</a>
<input type="checkbox"/>	2619771	9473369	Comm. Cntrl. Budget Processor	01/23/2019 12:09:10PM	Text Files (*.txt)	Posted	<a href="#">Details</a>


☒ Select All ☐ Deselect All  
[Delete](#) Click the delete button to delete the selected report(s)

[Save](#)

List | Explorer | Administration | Archives

4. Click on the link in the Description box



 <p><b>State of Vermont</b> Finance and Management Department Division of Financial Operations</p>	PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, DELIVERY MEMORANDA, BILLS OF LADING, PACKAGES AND CORRESPONDENCE.			
	Purchase Order	Date	Revision	Page
	011110-0000000959	01-23-2019		1
	Payment Terms	Freight Terms	PO Status	Currency
		Destination	Approved	USD
	Buyer	Phone		
	Ella Test			

<b>Supplier:</b> 0000294841 Presidio Networked Solutions 10 Sixth Rd Woburn MA 01801 United States	<b>Ship To:</b> Finance and Management Department Division of Financial Operations 109 State St 4th Flr Montpelier VT 05609-5901 United States
	<b>Bill To:</b> Finance and Management Department Division of Financial Operations 109 State St 4th Flr Montpelier VT 05609-5901 United States

Line-Sch	Description	Quantity	UOM	Unit Price	Extended Amt	Due Date
1 - 1	Rubrik Back Up	5,000.00	EA	0.01	50.00	01/23/2019
Contract ID: 0000000000000000000034576		Contract Line: 1				
<b>Item Total</b>					<u>50.00</u>	
2 - 1	Rubrik Back up Service	5,000.00	EA	0.01	50.00	01/23/2019
Contract ID: 0000000000000000000034576		Contract Line: 2				
<b>Item Total</b>					<u>50.00</u>	
<b>Total PO Amount</b>					<div style="border: 1px solid black; padding: 2px;">100.00</div>	

Authorized Signature	Date
----------------------	------

### Print a Purchase Order for Authorized Signature is Complete

## Dispatch and Print a Purchase Order from the Run Control Process

Purchase Order needs to be in **Approved – PO Status** and **Valid – Budget Status**:

Maintain Purchase Order

**Purchase Order**

Business Unit 01110  
PO ID 0000000953  
Change Order 1  
Copy From

PO Status Approved  
Budget Status Valid

☐ Hold From Further Processing

**Header** ?

\*PO Date 11/26/2018 Supplier Search Doc Tol Status Valid  
\*Supplier WBMASONCOI-001 Supplier Details Backorder Status Not Backordered Create BackOrder  
\*Supplier ID 0000283240 W.B. Mason Co., Inc. Receipt Status Not Recvd  
\*Buyer CTOUCHET Caitlin Ann Touchette \*Dispatch Method Print Dispatch

The Purchase Order will not be dispatched.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Purchase Orders > Dispatch Purchase Orders

**Navigator Menu navigation:** Purchasing > Purchase Orders > Dispatch POs

The **Dispatch Purchase Orders** page displays, click on the **Add a New Value** tab:

**Dispatch Purchase Orders**

Find an Existing Value Add a New Value

Run Control ID Dispatch\_PO\_Print

Add

1. **Run Control ID** - Enter a run control ID, Example: Dispatch\_PO\_Print
2. Click **Add**

The **Dispatch POs** page displays:

Dispatch POs

Run Control ID Dispatch\_PO\_Print    Report Manager    Process Monitor    **Run**

Language English    Specified Language    Recipient's Language

**Process Request Parameters**

Business Unit 01110

To

PO ID 0000000953    Select Purchase Order

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

**Statuses to Include**

☐ Approved    ☐ Dispatched    ☐ Pending Cancel

**Dispatch Methods to Include**

☒ Print    ☒ FAX    ☒ EDX

☒ E-Mail    ☒ Phone

**Miscellaneous Options**

\*Chartfields Valid Chartfields

Change Orders Changed and UnChanged Orders

☐ Print Changes Only    ☐ Print BU Comments

☐ Test Dispatch    ☒ Print PO Item Description

☐ Print Copy    ☐ Print Duplicate

Sort By Sort by Line Number

**Save**    **Notify**    **Add**    **Update/Display**

In the **Process Request Parameters** box

3. **Business Unit** - Enter a valid BU
4. **PO ID** - Enter a valid PO number (click the **Magnifying Glass** next to the PO ID field to select from a list of values)

In the **Miscellaneous Options** box

5. Change the value in the **Chartfields** box from **Valid Chartfields** to **Recycled AND Valid Chartfields**
6. Click **Save**
7. Click **Run**

The **Process Scheduler Request** window opens:

Process Scheduler Request

User ID ESTUBIN    Run Control ID Dispatch\_PO\_Print

Server Name    Run Date 01/23/2019

Recurrence    Run Time 3:46:50PM    Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PO BI Publisher Dispatch	POXMLP	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	Email	PO_PO_EMAIL	Application Engine	Web	TXT	Distribution

**OK**    **Cancel**

8. Select **PO BI Publisher Dispatch**
9. Click **OK**

You are returned to the **Dispatch POs** page:

Dispatch POs

Run Control ID Dispatch\_PO\_Print **Report Manager** Process Monitor Run

Language English Specified Language Recipient's Language

Process Instance: 9473410

**Process Request Parameters**

Business Unit 01110

To

PO ID 0000000953 Select Purchase Order

PO Status Approved

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Fax Cover Page

Template ID

**Dispatch Methods to Include**

☒ Print ☒ FAX ☒ EDX

☒ E-Mail ☒ Phone

**Miscellaneous Options**

\*Chartfields Valid Chartfields

Change Orders Changed and UnChanged Orders

☐ Print Changes Only ☐ Print BU Comments

☐ Test Dispatch ☒ Print PO Item Description

☐ Print Copy ☐ Print Duplicate

Sort By Sort by Line Number

Save Notify Add Update/Display

**Process Instance** is initiated

10. Click on the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** link:

List Explorer **Administration** Archives

**View Reports For**

User ID ESTUBIN Type Last 1 Days Refresh

Status Folder Instance to

**Report List** Personalize Find View All First 1-7 of 7 Last

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	2619812	947341	PO_DISPATCH - PO_DISPATCH.pdf	01/23/2019 3:50:35PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	2619805	9473404	Comm. Cntrl. Budget Processor	01/23/2019 3:14:24PM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	2619800	9473399	PO_DISPATCH - PO_DISPATCH.pdf	01/23/2019 2:41:23PM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	2619797	9473395	Comm. Cntrl. Budget Processor	01/23/2019 2:15:14PM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	2619776	9473374	AMR_JGEN	01/23/2019 12:28:44PM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	2619772	9473370	PS/AP Voucher Posting	01/23/2019 12:09:10PM	Text Files (*.txt)	Posted	Details
<input type="checkbox"/>	2619771	9473369	Comm. Cntrl. Budget Processor	01/23/2019 12:09:10PM	Text Files (*.txt)	Posted	Details

☒ Select All ☐ Deselect All

Delete Click the delete button to delete the selected report(s)

Go back to Dispatch Purchase Orders

Save

List Explorer Administration Archives

11. Click on the **link** in the Description box

The document will open in a new browser window:

Line-Sch	Description	Quantity	UOM	Unit Price	Extended Amt	Due Date
1 - 1	OFFICE SUPPLIES	200.00	EA	0.01	2.00	12/26/2018
Item Total					2.00	
Total PO Amount					2.00	

PURCHASE ORDER NO. MUST APPEAR ON ALL INVOICES, DELIVERY MEMORANDA, BILLS OF LADING, PACKAGES AND CORRESPONDENCE.			
Purchase Order	Date	Revision	Page
01110-0000000953	11-26-2018	1 - 2018-11-26	1
Payment Terms	Freight Terms	PO Status	Currency
	Destination	Approved	USD
Buyer	Phone		
Caitlin Ann Touchette	828-1395		

**State of Vermont**  
Finance and Management Department  
Division of Financial Operations

**Supplier:** 0000283240  
W.B. Mason Co., Inc.  
68 Nesti Drive  
South Burlington VT 05403  
United States

**Ship To:** Finance and Management Department  
Division of Budget Operations  
109 State St  
Montpelier VT 05609-0401  
United States

**Bill To:** Finance and Management Department  
Division of Financial Operations  
109 State St 4th Flr  
Montpelier VT 05609-5901  
United States

Authorized Signature		Date

12. Click [Print](#)

**Dispatch and Print a Purchase Order from the Run Control Process is Complete**

## Reports & Queries

A complete listing of reports and queries available in VISION for the Purchasing module can be found in the [Purchasing Reporting Manual](#).