Financial Management → Procurement → Purchasing → Purchase Orders

Click “New” to start a new Purchase order
P.O. Entry Screen
Two Sections –
Top is Header – Bottom is Item Detail
New Purchase order – Header

**Type a partial vendor name to select vendor from list**

<table>
<thead>
<tr>
<th>Approval Status</th>
<th>N/A</th>
<th>Validation Status</th>
<th>N/A</th>
<th>Printed</th>
<th>N/A</th>
<th>Encumber Funds</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
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<td><strong>Template</strong></td>
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<tr>
<td><strong>Department</strong></td>
<td>1000-150 - Administration, Finance</td>
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<td><strong>Vendor</strong></td>
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<tr>
<td><strong>Description</strong></td>
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<td><strong>Type</strong></td>
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<tr>
<td><strong>Bill To Location</strong></td>
<td>P-1000 - Administration</td>
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</tbody>
</table>

**Purchasing Address**
- GL Date: 05/09/2016
- Deliver by Date
- Expiration Date
- Resolution Number
- Assign to Buyer

**Description for “your information”** – does not print on PO – only shows in “lists” on the system. This helps you identify the PO when looking for it later.

Two choices:
- **CBG** – City of Bowling Green Standard P.O.
- **SBKT** – Super Blanket P.O. - multiple items over time from the same vendor (eg. Office supplies)

**SBKT** – Blanket form for SBKT type PO
**STND** – Standard form for CBG type PO
P.O. Detail - Items

This is the same as the five digit account number (eg. 73700 – fees)

This individual item description will print on the P.O. (eg. “Blue Pens”)

If you need more space for your description

Your fund, department, and account that you want to charge. XXXX-XXX-XXXX

If you want to “split fund” this item between multiple accounts. (see next slide)
Charge multiple accounts

Account number must match the “Item” from the previous screen and must be the same for each “split” for this item. (eg. 74518)

Save when finished. Once you’ve saved, hit “Cancel” to return to the prior screen -- yes, it’s odd but that’s the way it works.
Adding Multiple Items

Once you save your first item, you can then select “Save/New Item” to add other items to your Purchase order. In the middle of the screen you can move through the items you’ve included.
Quotes – documentation for items over $750.00 (City policy requires this)

- Two ways to document quotes that you’ve obtained
  - Add a Note to the PO and type the information concerning the various vendors and amounts.
  - Attach a document from your computer containing vendor quotes or other documentation
Validation and the Approval Process

- Once you’ve completed and saved your purchase order you must validate and approve your work.
- Once you’ve validated and approved the P.O. the work flow set up for your department begins for any other approvals needed.

![Image of purchase order entry screen with 'Validate (check mark)' and 'Approve (thumbs up)' highlighted]
Once you select “Approve” hit “OK” – we prefer you don’t send the approval to a specific user, hitting “OK” will send it to all eligible approvers at the next level.
Printing, Posting and Sending your P.O.

• The Bad News:
  – The system will not tell you when your Purchase Order has been through all the approval steps and is ready to print and post.
  – You have to look to see the status of your P.O. in the purchase order list. This is where you first went to start your new P.O. (Financial Management → Procurement → Purchasing → Purchase Orders.

• The Good News:
  – This process has eliminated a great deal of paper and has improved the accuracy and timeliness of the entire purchase order process! You can now see where in the process items are sitting and you can decide to print a paper copy of the P.O. if you need one.
Print and Post
(You have to do this)

Once the P.O. has been approved you must print and post.

Print – when you print, the print file goes to your reports section where you can decide to send the output to a printer if so desired.

You can also email your P.O. to the vendor or anyone else using this icon.

Post – you aren’t finished until you post!
Changing or Deleting a Purchase Order
Financial Management → Procurement → Purchasing → Change Purchase Orders

1. The first step is to find the purchase order that you want to change. The light blue area below is the search section. Complete as little or as much of this section and hit search. Unless you are looking for a purchase order that is already in the change process you must UNCLICK the “CHANGE PROCESS ONLY” check box! Click “Search.”
Changing or Deleting a Purchase Order (cont.)

To change a purchase order: Once you have searched and found the purchase order you want to change, click the blue hyperlink P.O. Number. You can make any changes you want to the P.O. You must then save, validate, and approve, just like with a new P.O. This then starts the P.O. process. You must check back here to see when it is approved and then you may print and you MUST POST.
Changing or Deleting a Purchase Order (cont.)

To delete a purchase order: Once you have searched and found the purchase order you want to delete, highlight the row (by clicking in a blank portion of the row containing the P.O.) and select “Complete”. You must then validate, and approve, just like with a new P.O. This then starts the P.O. process. You must check back here to see when it is approved and then you MUST POST.

C-Pend indicates that the P.O. has been used and is now being completed – the remaining balance returned to budget. V-Pend indicates that the P.O. is being voided (it has not been used) and the entire balance is returned to budget.