

Create a Purchase Order

How to Create a Purchase Order

- 1. Double-click the "Purchase Order" template
- 2. Accept the Purchase Order number in the "Number" field. Click OK to select.

NOTE - If the PO is an Emergency PO, enter the PO # from the paper PO.

🖬 Create New Purchase Order 🛛 🔀				
Create in Prescott	2			
<u>N</u> ew number:	300002690			
Template to use:	(none)	•		
	OK	Cancel		

3. The following fields are optional:

"Title", "Order Type", "Buyer"

- 4. The **"Ordered on"** date should represent the date the order is created.
- 5. The only mandatory field is the "Ordered from" vendor. This should be the vendor number.
- 6. Click on "Add Line" when ready to continue.

🖑 Purchase Order Lin	ne 300002690-1 - General Information					
<u>File E</u> dit <u>V</u> iew <u>W</u> indow	Help					
🖉 🖉 🖉 🖉	10 🗁 🗁 🖄 🛞 且 🕤					
300002690-1						
:= General Information	Charging Taxes Conditions Keywords General Deliver To Vendor Shipping					
	Requisition/line: 7					
Transactions	Requesting site: Prescott					
Costs	Catalog item:					
🔁 Status	Description:					
	8					
	Vendor resource: (none)					
	Quantity required:					
	Purchase this item under consignment					
	Price is: Firm C Estimated C No charge					
	Base price: per lea 🗸					
	Price: Per ea					
	Total:					
	Price adjustments: None					
Freeze price Break Details 9 Auto invoice upon receipt						
•	<u>▶</u>					
For Help, press F1	Prescott NUM					

			12
12 30000269	0 <untitled></untitled>	Draft	
	General Taxes Conditions Keywords	Description	
Contacts Conta	Title: KUntitled> Order type: 1-Direct Purchas Contract number: 1-Direct Purchas Release: 1 Contract title: 1 Ordered from: 5 Vendor name: 1	e V 	
6	Invoicing site: Prescott Currency: United States Do Buyer: 3 Hooker, Susan Ordered on: 4 12/5/2006 Confirmation order Add Line	əllar 🔽 at 07:15	•

- 7. The **"Requisition /line"** number is entered then click the tab key.
- 8. Adjust the "Description", "Quantity required" and "Base price" if applicable.
- 9. Note the "Auto invoice upon receipt" box should not be checked.
- There is no need to check any other fields. When done with the data in the General tab, click the "Smart Create" icon. This will populate the purchase order with the next line from the requisition.
- 11. Repeat steps 8 through 10 until all lines are added to the purchase order.
- 12. When the last line is entered the next line will appear blank. Close this line by clicking the ⊠ in top right corner. You can then close the purchase order in the same way or leave it open to create the next purchase order by selecting the "Create New" icon.
- 13. Click "Send to Vendor" to send Purchase order to PeopleSoft.



© 2006 Invensys