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.

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.

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.

10. 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 [X] 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.