

# easyPurchase™ Purchase Order Reference Guide



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# easyPurchase™ Purchase Order Process

This document provides a condensed overview of the Purchase Order Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

## Creating a Purchase Order



### Purchase Order Create - Summary Selection

#### Instructions:

- Select a Vendor Name and/or a Ship To Location and/or a Workflow Route Description.
- Simply click the Submit button to see all Planned Purchase Orders.

**NOTE: For faster Purchase Order creation, we recommend selecting at least one Required Input (Vendor, Workflow, Ship To) filter.**

#### Required Input

2 Vendor Name:

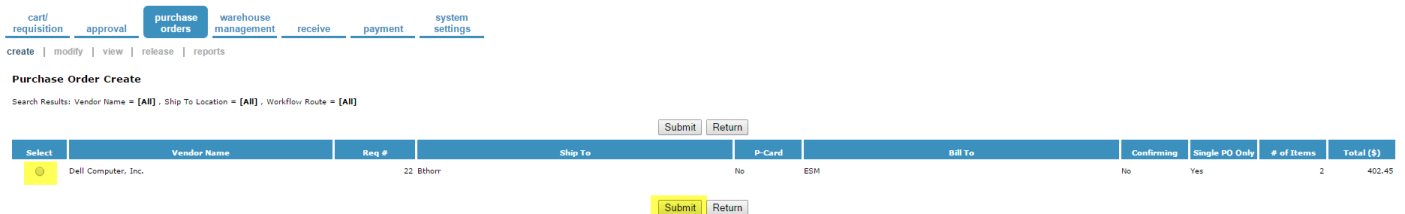
3 Workflow Route Description:

4 Ship To Location:

5

1. Create: tab to search for an approved requisition to create a purchase order
2. Vendor Name: search requisitions by Vendor
3. Workflow Route Description: search requisitions by Workflow
4. Ship To Location: search requisitions by Location
5. Submit: shows requisitions based on search criteria

The user can select a requisition from Search Results or Return to Search Criteria.



From the approved requisition, a purchase order can be created by checking Add all items to PO. Then select Submit.

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### Purchase Order Create

Vendor Name: Dell Computer, Inc. 6 Fiscal Date (mm/dd/yyyy): 10/15/2015

1 Ship To Location: Bthor Credit Card Purchase: No

2 Bill To Location: ESM Confirming PO: No

3 Add all items to PO:  7 Auto Release PO:

4 PO Comments:

5 Internal Notes:

Req #	Requestor	Requisition Date	Product Description	Qty	Total (\$)	Fiscal Date	Notes	Delete Item
22	Thermonston, Brittany	10/15/2015	Dell D420 Laptop Battery <a href="#">(more info)</a>	1	134.15	10/15/2015	<input type="text"/>	<input type="checkbox"/>
22	Thermonston, Brittany	10/15/2015	Dell D620 Laptop Battery <a href="#">(more info)</a>	2	268.30	10/15/2015	<input type="text"/>	<input type="checkbox"/>

Sub Total: \$ 402.45  
 10 Shipping & Handling: \$  OR  %  
 11 Tax: \$  OR  %  
**Total: \$ 402.45**

12

The following fields can be edited:

1. Ship To Location: update location
2. Bill To Location: update location
3. Add all items to PO: checking includes all items
4. PO Comments: external note (Supplier)
5. Internal Note: only visible to users
6. Fiscal Date: date used for financial year that defaults to current date (may not be editable)
7. Auto Release PO: automatically releases purchase order
8. Notes: Internal/External Notes can be added at the line-item level
9. Delete Item: remove item(s)
10. Shipping & Handling (optional): add via dollar amount or percentage
11. Tax (optional): add via dollar amount or percentage
12. Submit: creates the purchase order

## Modifying a Purchase Order

Purchase Orders can be edited under the Modify tab by searching the bracketed fields below.

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### Modify Purchase Order

**Instructions:**

- Enter the Start Date of your search. Note - the Date fields are based on the date the purchase order was created. Also, the year must have four digits.
- Enter the End Date of your search. Note - the Date fields are based on the date the purchase order was created. Also, the year must have four digits.
- Enter the Purchase Order Number to modify the purchase order of interest.
- Enter all or a portion of the Vendor's Name or enter the Vendor's Number. Note - When entering a Vendor's Name a minimum of three characters must be used. Depending on the entry a Vendor selection screen may be displayed requiring you to narrow your search to one Vendor.

**Required Input**

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

Sort By:

optional

Purchase Order Number:

OR

Vendor Name:

OR

Vendor Number:

The user can select a purchase order from Search Results or Return to Search Criteria.

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**Modify Purchase Order**  
Date Range: 11/01/2015 - 11/30/2015

[Submit](#) | [Return](#)

Select	PO #	PO Date	Req #	Vendor	PO Amt (\$)	Ship To Location	Cancel PO
<input type="radio"/>	11	11/3/2015 3:41:04 PM	10	Test for Non-catalog Items	119,025.00		<input type="checkbox"/>
<input checked="" type="radio"/>	12	11/6/2015 4:13:34 PM	22	Dell Computer, Inc.	422.57		<input type="checkbox"/>

[Submit](#) | [Return](#)

## Canceling a Purchase Order

Under the Modify tab, the user can cancel a purchase order by checking Cancel PO.

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**Modify Purchase Order**  
Date Range: 11/01/2015 - 11/30/2015

[Submit](#) | [Return](#)

Select	PO #	PO Date	Req #	Vendor	PO Amt (\$)	Ship To Location	Cancel PO
<input type="radio"/>	11	11/3/2015 3:41:04 PM	10	Test for Non-catalog Items	119,025.00		<input checked="" type="checkbox"/>
<input type="radio"/>	12	11/6/2015 4:13:34 PM	22	Dell Computer, Inc.	422.57		<input type="checkbox"/>

[Submit](#) | [Return](#)

Confirm cancelation of the order by selecting Delete.

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**Purchase Order Modify - Delete Confirmation**  
**Warning: You are about to delete the following purchase order(s). Click Delete to proceed or Cancel to return.**

PO #	Vendor	Released to Vendor
11	Test for Non-catalog Items	n/a

[Delete](#) | [Cancel](#)

The cancelled Purchase Order returns to the Create tab as an approved requisition. The user can delete it by selecting Delete Item checkbox for all items. Then select Submit.

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**Purchase Order Create**

Vendor:  Test for Non-catalog Items [Change](#) | Fiscal Date (mm/dd/yyyy):

Ship To Location:  | Credit Card Purchase:  No

Bill To Location:  | Confirming PO:  No

Add all items to PO:  | Auto Release PO:

PO Comments:

Internal Notes:

Req #	Requestor	Requisition Date	Product Description	Qty	Total (\$)	Fiscal Date	Notes	Delete Item
10		09/02/2015	Test Product <a href="#">more info</a>	345	119,025.00	09/02/2015		<input checked="" type="checkbox"/>

**Sub Total: \$**   
 Shipping & Handling: \$  OR  %  
 Tax: \$  OR  %  
**Total: \$**

[Submit](#) | [Return](#)

The user can confirm permanent deletion by selecting Delete Button or return the Create tab by selecting Cancel Button.

cart/ requisition approval **purchase orders** warehouse management receive payment system settings

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**Requisition Line Item - Delete Confirmation**

**Warning: You are about to permanently delete the following:**

Req #	Requestor	Requisition Date	Product Description	Qty	Total \$	Fiscal Date
10	William Thompson	9/2/2015 12:07:02 PM	Test Product	345	119025.00	09/02/2015

Delete Cancel

Note: The requisition will return to the requestor's Cart with the status of Deleted.

## Viewing Purchase Orders

Under the View tab, the user can see his/her Purchase Orders by searching any bracketed fields below.

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**View Purchase Order**

**Instructions:**

- Enter the Start Date of your search. Note - the Date fields are based on the date the purchase order was created.
- Enter the End Date of your search. Note - the Date fields are based on the date the purchase order was created.
- To view the account code details by line item, click the View Item Account Detail checkbox. When the PO number hyperlink is selected on the next page the account code detail will display instead of the vendor purchase order.
- Enter the Purchase Order Number to view the purchase order of interest.
- Enter all or a portion of the Vendor's Name or enter the Vendor's Number. Note - When entering a Vendor's Name a minimum of three characters must be used.

**Required Input**

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

Sort By:

View Item Account Detail:

**optional**

Purchase Order Number:

or

Vendor Name:

or

Vendor Number:

View

The user can view the Purchase Order by selecting the desired PO #. The search results provide Release and Receiving statuses of the Purchase Order.

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**View Purchase Order - Show Vendor PO**

Date Range: 10/31/2015 - 11/10/2015

Return

PO #	PO Date	Req #	Vendor	PO Amt (\$)	Ship To Location	Released to Vendor	Receiving Status
9	11/3/2015 11:47:11 AM	23	Dell Computer, Inc.	134.15		11/3/2015 11:47:32 AM - Hard Copy	No Receipts
10	11/3/2015 11:47:17 AM	15	Apple Computer, Inc.	108.00		11/3/2015 11:47:42 AM - Hard Copy	No Receipts
13	11/10/2015 2:03:49 PM	25	Dell Computer, Inc.	402.45		No	No Receipts
15	11/10/2015 2:04:41 PM	16	Asus Office Products	123.25		No	No Receipts
16	11/10/2015 2:04:47 PM	17	Dell Computer, Inc.	668.11		No	No Receipts

Return

Note: The search results will only display submitted Purchase Orders.

## Releasing a Purchase Order

Under the Release tab, the user can search Purchase Orders for release to Supplier.

[cart/requisition](#) | [approval](#) | **[purchase orders](#)** | [warehouse management](#) | [receive](#) | [payment](#) | [system settings](#)  
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### Release Purchase Order

**Instructions:**

- Click the View button to view all purchase orders awaiting release.
- Optionally, enter a Purchase Order Number in the space provided to view a specific purchase order awaiting release.
- Purchase orders awaiting release can also be viewed by Vendor Name and Ship To Location by clicking the appropriate pull-down menu and selecting from the available options.

optional

Purchase Order Number:

or

Vendor Name:

Ship To Location:

The user can select from the release options shown below.

[cart/requisition](#) | [approval](#) | **[purchase orders](#)** | [warehouse management](#) | [receive](#) | [payment](#) | [system settings](#)  
 create | modify | view | **release** | reports

Release Purchase Order

PO #	PO Date	Req #	Vendor	PO Amt (\$)	Ship To Location	1 Hard Copy	2 Electronic	3 Method	4 Hold
14	11/10/2015 2:04:41 PM	16	Apex Office Products	123.25		<input type="radio"/>	<input type="radio"/>	<input type="radio" value="Fax"/>	<input type="radio"/>
17	11/10/2015 3:33:02 PM	26	Dell Computer, Inc.	267.42		<input type="radio"/>	<input type="radio"/>	<input type="radio" value="Email"/>	<input type="radio"/>
12	11/11/2015 3:44:28 PM	28	Office Depot, Inc.(Punch Out)	199.99		<input type="radio"/>	<input type="radio"/>	<input type="radio" value="XML"/>	<input type="radio"/>

1. Hard Copy: PDF copy of Purchase Order sent to user's email
2. Electronic: Purchase Order sent automatically to the Supplier based on Method (3)
3. Method: Electronic released Purchase Orders can be sent via Fax, Email or XML
4. Hold (default): no action taken
5. Submit: releases Purchase Order

Note: Users can release multiple Purchase Orders.

The user will receive a confirmation message when Purchase Order(s) has been released.

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### Release Purchase Order

**Purchase Order 14 has been released.**

## Re-releasing a Purchase Order

A Sys Admin may need to re-release a Purchase Order for a variety of reasons, such as a Failed XML Release, Vendor never receiving the Order, Declined Credit Card, etc. Under the Release tab, the Sys Admin can search for the Purchase Order and select the desired release option. A Warning Message will appear before allowing the Purchase Order to release again.

[cart/requisition](#) | [approval](#) | **[purchase orders](#)** | [warehouse management](#) | [receive](#) | [payment](#) | [system settings](#)

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### Release Purchase Order - Confirmation

**Warning: The following purchase orders have been previously released to the vendor. Click Continue to proceed or Cancel to return.**

PO #	Vendor	Released to Vendor
30	<a href="#">Dell Computer, Inc.</a>	3/28/2016 11:30:50 AM - Hard Copy

## Encumbrance Status

The General Ledger communicates either a successful transaction (Pending), queued for GL process (Awaiting Response), or an error (Maintenance Required). Select the Reference # / PO # to identify the error message.

[cart/requisition](#) | [form request](#) | [approval](#) | **[purchase orders](#)** | [form management](#) | [warehouse management](#) | [receive](#) | [payment](#) | [invoice](#) | [system settings](#)

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### Fund Accounting - Summary

Reference # / PO #	PO Date	Ship To Location	Vendor Name	Action	Status
736	1/22/2013 10:21:38 AM	Admin Building	Apex Office Products - update	Delete	Maintenance Required
734	2/19/2013 1:55:55 PM	Admin Building	Apex Office Products - update	Encumber	Awaiting Response
733	2/19/2013 2:04:42 PM	Admin Building	Apex Office Products - update	Encumber	Awaiting Response
732	2/19/2013 3:43:03 PM	Admin Building	edirectall Specialty Catalog	Encumber	Awaiting Response
731	2/19/2013 3:45:49 PM	Sprint 11 Test - Fax Release Test for email	Apex Office Products - update	Encumber	Awaiting Response
801	3/23/2013 10:09:47 AM	Admin Building	New Test Vendor	Encumber	Maintenance Required
818	5/23/2013 11:34:21 AM	Admin Building	Apex Office Products - update	Encumber	Awaiting Response
801	9/23/2013 11:34:33 AM	Admin Building	Apex Office Products - update	Encumber	Awaiting Response

The status column displays the General Ledger's error message. Check Bypass Integration to release the purchase order without validating in the General Ledger.

[cart/requisition](#) | [form request](#) | [approval](#) | **[purchase orders](#)** | [form management](#) | [warehouse management](#) | [receive](#) | [payment](#) | [invoice](#) | [system settings](#)

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### Fund Accounting - Detail

#### Encumbrance

Purchase Order Number:   **Bypass Integration**

Purchase Order Fiscal Date:

Vendor Name:  GL Vendor ID:

Ship to Location:  GL Ship-To ID:

**The following field(s) must be corrected: Vendor ID**

Product Description	Account Number	Amnt(\$)	Line Status
100 Item 1 -- (1 per unit)	100	3.00	Awaiting Transaction
200 Item 2 RF -- (1 per unit)	100	1.00	Awaiting Transaction
Item 3 -- (1 per unit)	100	3.00	Awaiting Transaction
Total:		9.00	