Purchase Order List

Last Modified on 05/26/2022 1:57 pm EDT

This screen shows a listing of all purchase orders.

Change the filters to find the PO’s you want to see.

By default it shows all unposted purchase orders.

Buttons will be activated based on where you fall in the approval table process. The checkbox on the left side allows you to check multiple P.O.'s for approval, post, etc.

- Double-click on a line to browse the detail of the purchase order.

You may also browse the attachments if any exist.

- To add a purchase order click the New button.

Group: Select the approval group if you wish to view purchase orders for just one Group, or select All to view purchase orders for all approval groups. Adjacent to Group a dropdown displays all PO approval tables for the selected group(s). Select a specific table as needed or leave as (All) to display all approval tables.

Search: Search for POs by PO#, Vendor Name, or Description.

Status: Filter by where P.O.'s are at in the approval process as well as being paid.

Show only mine: Shows only those P.O.'s that apply to you, which means only those that you entered, are waiting on you for approval, or are waiting for you to post.

Posted: Show any PO’s that have not been Posted.

Open Status: Filter by whether P.O.'s are open or closed. A P.O. is considered closed when it has a zero balance.

Vendor Type: Filter by type of vendor…

Show records due for approval before: When Due Dates are activated this filter enables limiting the PO list to those POs due for approval before a specified date.

Timeframe: This filter limits the PO list to POs whose dates fall within specified date ranges.

View: Allows you to customize the columns and save your settings as a view. To hide or unhide columns click the customize columns button and check which columns are to be displayed. To order columns you can either click the customize columns button or just drag columns where you want them by dragging the column header. Save a view by clicking the save view button. You must have proper permissions to save or delete views.

Buttons

New: Click this button to add a new purchase order.

Edit: Click this button or double-click a P.O. to edit it or see the full P.O. detail.

Split-screen Edit (when activated in system options): Opens the PO edit screen in split-screen display listing the PO header information in the upper left, the PO entry detail in the bottom left, and PO attachment(s) (if any are present) displayed to the right.

(if PO not yet submitted for approval)

Submit: Submits the purchase order request for approval.

Send to reviewer (when activated): Sends the selected PO to a specified user for review/edit prior to approval submission.

(if PO previously submitted for approval)

Post: Makes the purchase order a permanent P.O. so that it can be used in invoice entry.

Approve: Approves the selected PO.

Disapprove: Can be expanded to show the Disapprove submenu:

Disapprove: Disapproves the selected PO.

Disapprove and resubmit: Denies approval and allows the user to alter the purchase order and resubmit for approval. The disapproving user becomes the new submitting user.

Log: Browses the approval log for a purchase order.

Approval Table:

Displays the following approval table submenu options:

Review approval table: Displays the active approval table for the selected PO.

(Other options available if user has sufficient permissions)

Send email to current approver: Sends a system generated email to the current waiting-on user indicating the PO has not yet been approved.

Approve for current approver and move to next approver: Approves on behalf of the current waiting-on user and moves PO to the next approver in the workflow.

Change waiting on user: Enables the user to modify the current waiting-on user and indicate a note to be sent to the substituted user.

Delete: A P.O. cannot be deleted once has been posted. If posted and you need to delete it, you must close the P.O. instead.

Attachments: Displays a list of all documents attached to the PO, and enables view/download.

Links: Entries, SGA windows, and/or URLs linked to the current PO.

Close: Manually closes the selected PO(s).

Import: Opens the PO import dialogue for creation of multiple POs from an outside data source.

Filter: Click this button to do advanced filtering. You can filter by vendor#, P.O.#, or a range of accounting periods.

Refresh: Refreshes the purchase orders with the current filters.

Forms: Print, preview, export to Word, or email the selected purchase order as a Word document.

Print: Depending on user's workstation settings, either opens a "Select Printer" dialogue to print the PO or generates a pdf of the PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.

Preview: Generates a pdf of the PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.

Word Export: Generates a word document containing all PO information, vendor #, Bill-to, Ship-to and all identifying information and GL distribution grid detail.

Email to Vendor: If a default email address is set this will email a copy of the PO in pdf form to the vendor.

Reports: Print, preview, or export to Excel the list of purchase orders displayed as it is displayed on the screen.

Quick Print: Depending on user's workstation settings, either opens a "Select Printer" dialogue to print the PO list or generates a pdf of the PO list information.

Advanced Print: Opens the Advanced Print dialogue and allows the user to change file zoom, print margins, column widths, and other options.

Excel Spreadsheet: Downloads the PO list information in .xls format.

Excel Save: Depending on user's workstation settings, either opens an .xls save dialogue or downloads the PO list information in .xls format.

For more information see purchase order setup and rules.