



Version	9.0
Document Generation Date	2/16/2009
Last Changed by	System Office
Status	Final

Creating a PO from Copying a PO

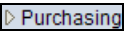
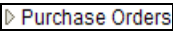

Concept

Copying an existing purchase order enables you to create a purchase order without having to spend time entering all the required data. Copying eliminates redundant data entry by using an existing purchase order as a template.

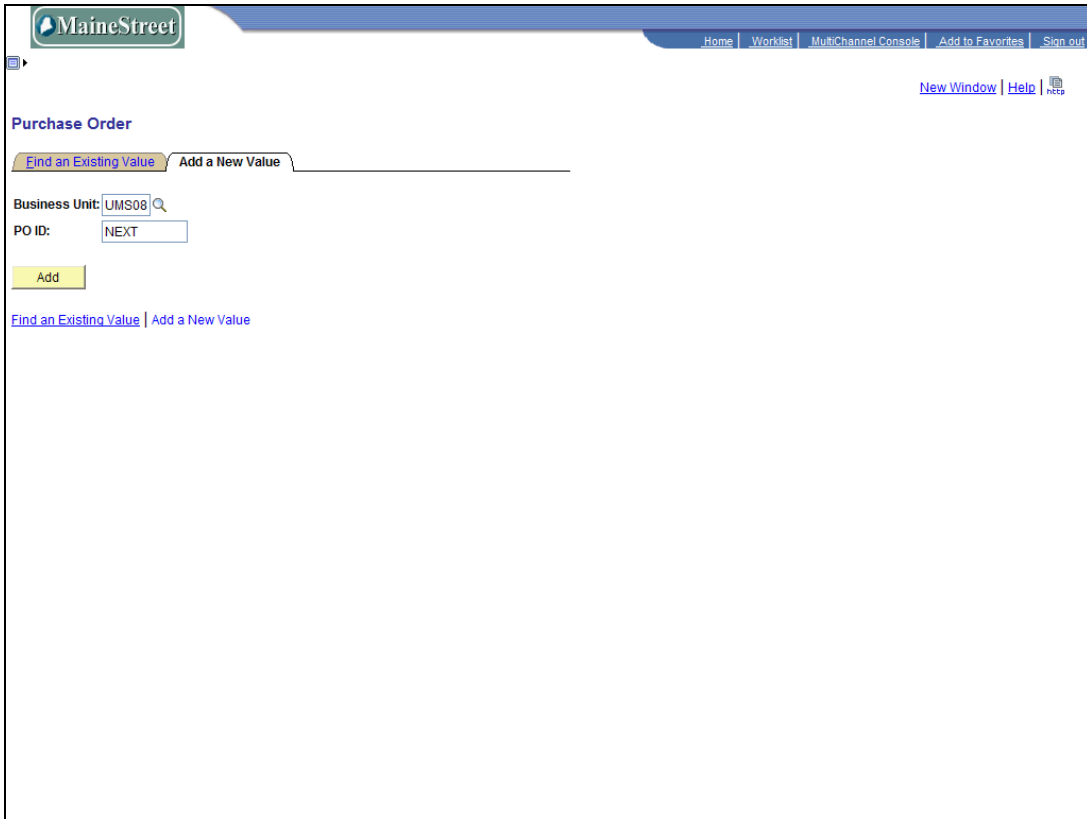
Consider this scenario: You need to reorder some supplies. To save time, you want to copy from your last PO because you wish to order the same items.

Navigation



Step	Action
1.	From the Financials menu, click the Purchasing link. 
2.	Click the Purchase Orders link. 
3.	Click the Add/Update POs link. 

Procedure



Step	Action
4.	On the Purchase Order Add a New Value page, click the Add button. <div style="text-align: center; margin-top: 5px;">  </div>

Process Document

Financials 9.0: Creating a PO from Copying a PO



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page

Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Initial
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: ▼ Hold From Further Processing

Header

*PO Date: 08/04/2008 [Vendor Search](#)
 Vendor: [Vendor Details](#)
 *Vendor ID:
 *Buyer:
 PO Reference:

Receipt Status: Not Recvd
 *Dispatch Method:

Amount Summary

Merchandise: 0.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 0.00 USD

Header Details PO Activities
 PO Defaults
 Add Comments

Lines

Customize | Find | View All | First 1 of 1 Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0.000	Active

*Go to: (Invalid Value) ▼

Step	Action
5.	On the Maintain Purchase Order page, click on the drop-down arrow in the Copy From field.

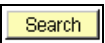
The screenshot shows the 'Maintain Purchase Order' page in the MaineStreet system. The 'Copy From' dropdown menu is open, and 'Purchase Order' is selected. The page includes fields for Unit (UMS08), PO ID (NEXT), PO Status (Initial), Budget Status (Not Chk'd), and a checkbox for 'Hold From Further Processing'. There are also fields for *PO Date, Vendor, *Vendor ID, *Buyer, and PO Reference. A 'Receipt Status' field is set to 'Not Recvd'. An 'Amount Summary' section shows Merchandise (0.00), Freight/Tax/Misc. (0.00), and Total Amount (0.00 USD). The 'Lines' section is visible at the bottom, showing a table with columns for Line, Item, Description, PO Qty, *UOM, Category, Price, Amount, and Status. The first line is active with a quantity of 0.000.

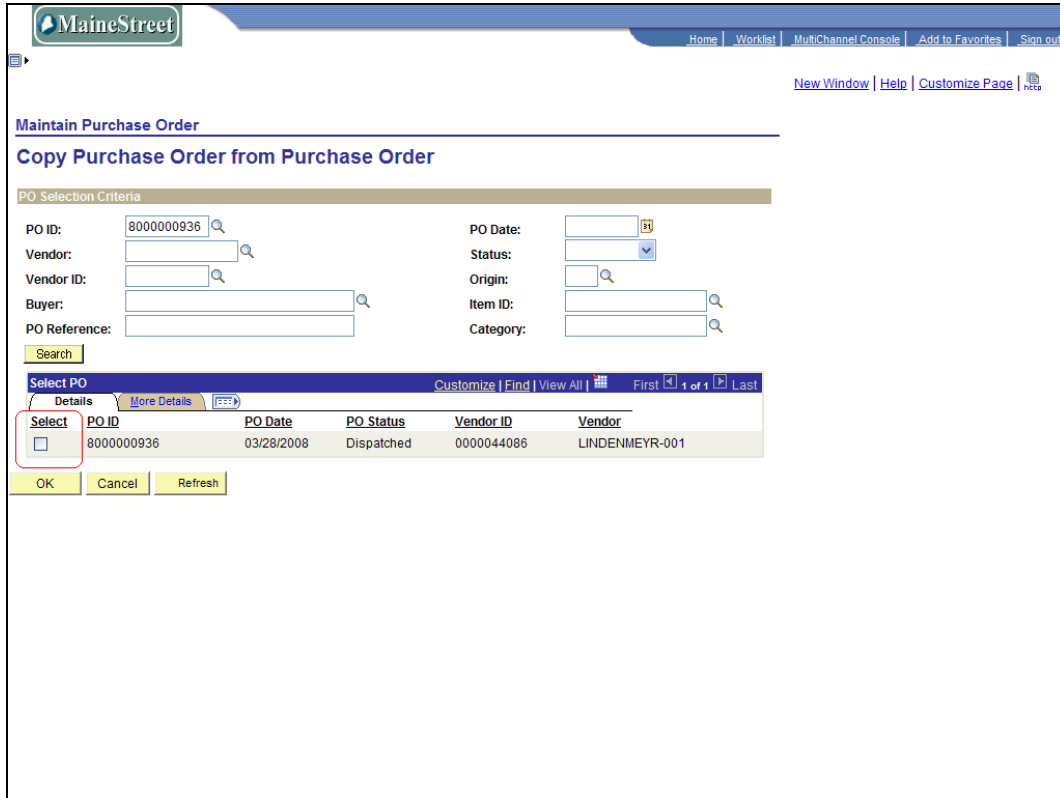
Step	Action
6.	Select Purchase Order from the list to access the Copy Purchase Order from Purchase Order page.
	<input type="text" value="Purchase Order"/>

Process Document

Financials 9.0: Creating a PO from Copying a PO



Step	Action
7.	<p>Use the Copy Purchase Order from Purchase Order page to select criteria to search for an existing PO and then select the desired PO to copy.</p> <p>Enter relative information like the Purchase Order ID, Vendor ID, and buyer information from the purchase order that you want to copy. The copy function only enables you to copy from one purchase order. If you attempt to copy more than one purchase order, the most recently copied purchase order overrides the previous purchase order information.</p> <p>You can copy a completed or canceled purchase order or a purchase order that has canceled lines to a new purchase order. If you copy a completed or canceled purchase order, all the lines from the canceled purchase order are copied over to the new purchase order and the status of the lines is made active. If you copy a purchase order that has one or more lines canceled, only the active lines from the existing purchase order are copied to the new purchase order.</p> <p>For this example, we will enter a PO ID in the PO ID field.</p>
8.	<p>Click the Search button.</p> 



Maintain Purchase Order

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID: PO Date:

Vendor: Status:

Vendor ID: Origin:

Buyer: Item ID:

PO Reference: Category:

Select PO Details Customize | Find | View All | First | 1 of 1 | Last

Select	PO ID	PO Date	PO Status	Vendor ID	Vendor
<input type="checkbox"/>	800000936	03/28/2008	Dispatched	000044086	LINDENMEYR-001

Step	Action
9.	<p>Notice that the details of the PO ID (in this case, PO ID 800000936) are displayed. You now need to select this PO ID to create a PO.</p> <p>Click the <i>Select</i> checkbox.</p> <input type="checkbox"/>
10.	<p>Click the OK button.</p> <input type="button" value="OK"/>

Process Document

Financials 9.0: Creating a PO from Copying a PO



MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | Help

Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Pend Appr
 PO ID: NEXT Budget Status: Not Chk'd
 Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 08/04/2008 [Vendor Search](#)
 Vendor: LINDENMEYR-001 [Vendor Details](#)
 *Vendor ID: 0000044086 LINDENMEYR MUNROE
 *Buyer: 0099999 Buyer Name
 PO Reference: [Text Box]

Receipt Status: Not Recvd
 *Dispatch Method: Print
 Amount Summary
 Merchandise: 735.00
 Freight/Tax/Misc.: 0.00
 Total Amount: 735.00 USD

Header Details PO Activities Add ShipTo Comments
 PO Defaults
 Add Comments

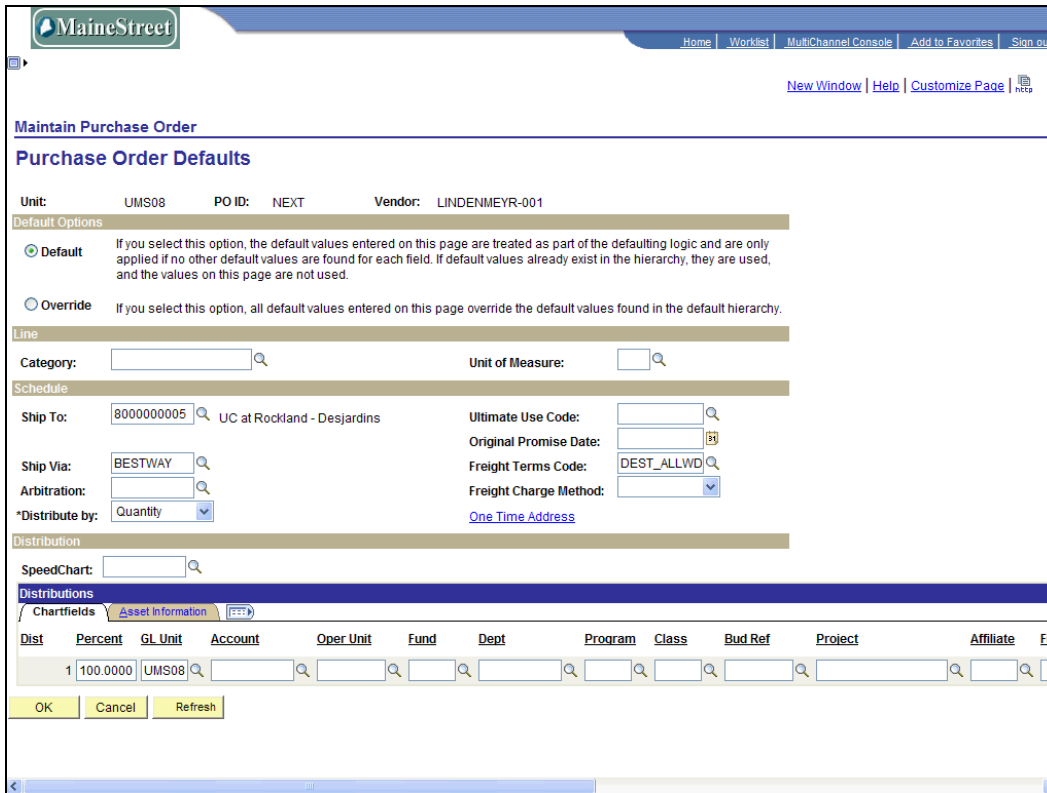
Lines

Customize | Find | View All | First | 1 of 1 | Last

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Change Order 6/14 8.5 x	21.0000	CS	MISC	35.00000	735.00	Active

*Go to: (Invalid Value)

Step	Action
11.	<p>The Purchase Order page reappears, displaying details of the selected PO.</p> <p>The PO Date field automatically defaults to the current system date. You can override the purchase order date.</p> <p>Click the PO Defaults link.</p> <p>PO Defaults</p>



Step	Action
12.	<p>Use the Purchase Order Defaults page to override the defaults set at the business unit, buyer, or vendor level and set defaults when none exist.</p> <p>If you select the Default option, the new default value that you enter on this page is assigned to the given field if no other value is assigned from prior defaults.</p> <p>If you select the Override option, the new value that you enter on this page overrides any value that is assigned from prior defaults. Only non-blank values are assigned.</p> <p>Make any necessary changes to the PO and click OK.</p> <div style="text-align: center;"> <input type="button" value="OK"/> </div>

Process Document

Financials 9.0: Creating a PO from Copying a PO



MaineStreet Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Maintain Purchase Order

Retrofit field changes to "all" existing PO lines/schedules/distributions.....


Unit: UMS08 PO ID: NEXT Vendor: LINDENMEYR-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.
Select 'Apply to All Distribs' to apply changes to all distribution lines on the PO.

Apply	Distrib Line	Field Name	Field Value	Apply to All Distribs
<input type="checkbox"/>		Ship To	8000000005	
<input type="checkbox"/>		Ship Via	BESTWAY	
<input type="checkbox"/>		Freight Terms Code	DEST_ALLWD	
<input type="checkbox"/>	1	Budget Date	2008-08-04	<input type="checkbox"/>
<input type="checkbox"/>	1	Location	8000000020	<input type="checkbox"/>

Select All Clear All

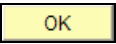
OK Cancel Refresh

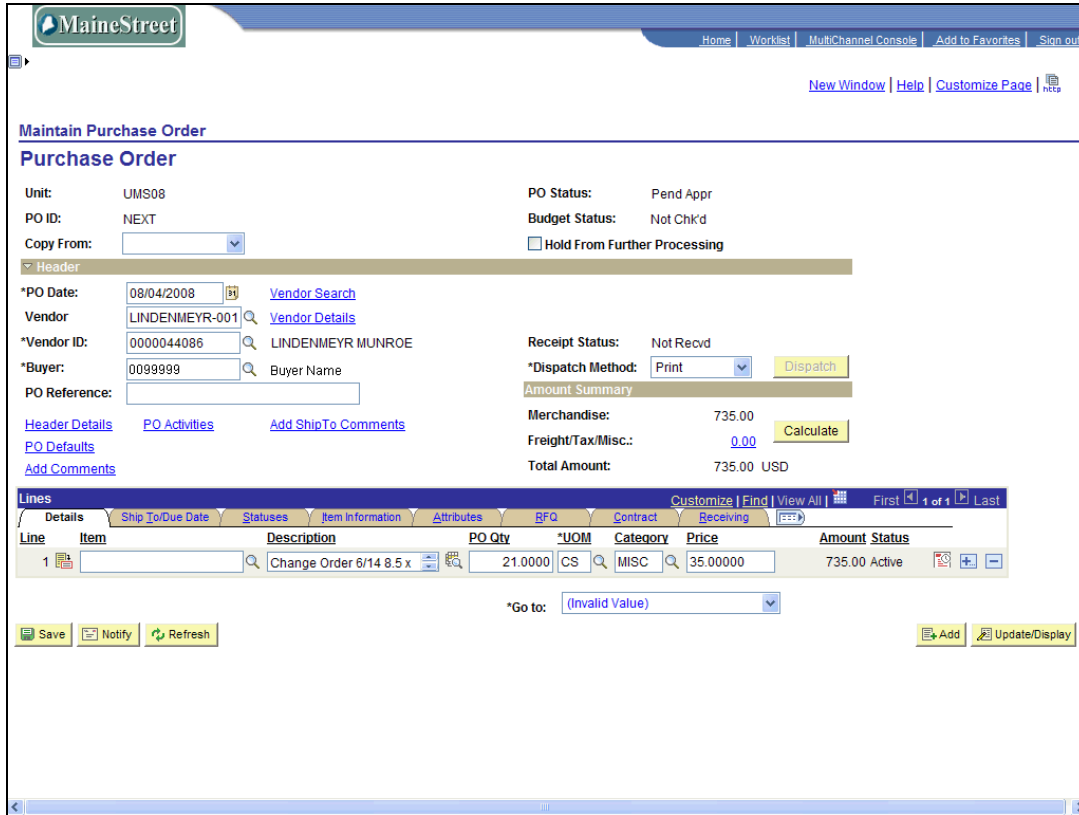
Step	Action
13.	<p>If you make changes or add values to the defaults on the previous page, when you exit the page, you are prompted with the Retrofit field changes to "all" existing PO lines/schedules/distributions... page.</p> <p>This page enables you to retrofit the default field value changes to lines, schedules and distributions on a purchase order without having to apply them to each area. You can make the changes once and apply as many of them as you want to the transaction.</p> <p>Select the Apply checkbox to apply the default field value change to the distribution line that appears in the Distrib Line field. For example, if you select Apply for the distribution line 1, the change will be applied to each distribution line 1 that appears on the purchase order.</p> <p>If the Distrib Line field is blank, this means the default field value change does not apply at the distribution level. In this case, select the Apply option to carry the default field value change to the line or schedule level instead.</p> <p>For this example, we will click the Select All checkbox to apply the default field value change to all existing distribution lines on the transaction, regardless of the distribution line value that appears.</p> 



Process Document

Financials 9.0: Creating a PO from Copying a PO

Step	Action
14.	Click the OK button to return to the Purchase Order page. 



Maintain Purchase Order

Purchase Order

Unit: UMS08 PO Status: Pend Appr
PO ID: NEXT Budget Status: Not Chkd
Copy From: [Dropdown] Hold From Further Processing

Header

*PO Date: 08/04/2008 [B] Vendor Search
Vendor: LINDENMEYR-001 Vendor Details
*Vendor ID: 0000044086 LINDENMEYR MUNROE
*Buyer: 0099999 Buyer Name
PO Reference: [Text Box]

Receipt Status: Not Recvd
*Dispatch Method: Print Dispatch
Amount Summary
Merchandise: 735.00
Freight/Tax/Misc.: 0.00 Calculate
Total Amount: 735.00 USD


Header Details PO Activities Add ShipTo Comments
PO Defaults
Add Comments

Lines

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1		Change Order 6/14 8.5 x	21.0000	CS	MISC	35.00000	735.00	Active

*Go to: (Invalid Value)

Save Notify Refresh Add Update/Display

Step	Action
15.	On the Purchase Order page, click the Save button. 

Process Document

Financials 9.0: Creating a PO from Copying a PO



PO Dispatch Routing

Business Unit UMS08

PO Number NEXT

When the dispatch method on the PO is set to print, the employee named below will receive a pdf file containing the actual PO for printing and sending to the vendor. You can change the employee to whom the pdf file is sent by selecting another name using the prompt. Click OK when done.

Note: If the PO Type is Prepaid, the pdf file is sent to the user for your campus who is responsible for getting the check cut that needs to go with the order. This name cannot be changed.

User ID Buyer Name

Step	Action
16.	The PO Dispatch Routing page appears. Click the OK button. <input type="button" value="OK"/>



Process Document

Financials 9.0: Creating a PO from Copying a PO

MaineStreet

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page |

Maintain Purchase Order

Schedules

Unit: UMS08 Vendor: LINDENMEYR-001
PO ID: 8000000973 PO Date: 08/04/2008
PO Status: Pend Appr

[Return to Main Page](#)

Line	Item	Description	PO Qty	CS	Amount	USD
1			21.0000		735.00	

[Schedules](#) [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Sched	*Ship To	*PO Qty	Price	Amount	Status
1	80000000005	21.0000	35.00000	735.00	Active

[Add ShipTo Comments](#)

[Save](#) [Notify](#) [Refresh](#) [Add](#) [Update/Display](#)

Step	Action
17.	Notice that a PO ID has been assigned.
18.	End of Procedure.