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Purchase Order List

Daily > Purchasing > Purchase Order List

This screen lists all purchase orders. Change the filters to see only the POs you want. 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 POs for approval, post, etc.

- Double-click on a line to browse the details 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 will display all PO approval tables for the selected group(s). Select a specific table as needed or leave it as (All) to display all approval tables.

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

Status: Filter by where POs are in the approval process and are being paid.

Show only mine: Only those POs 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 POs that have not been posted.

Open Status: Filter by whether POs are open or closed. A PO is considered closed when its balance is zero.

Vendor Type: Filter by type of vendor.

Show records due for approval before: When Due Dates are activated, this filter limits 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 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 will be displayed. To order columns, you can click the customize columns button or 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 a 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 the PO has not yet been submitted for approval)

Approval Menu/Submit: Submit the purchase order request for approval.

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

(if PO previously submitted for approval)

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

Approve: Approve the selected PO.

Disapprove: This can be expanded to show the Disapprove submenu:

Disapprove: Disapproves the selected PO.

Disapprove and resubmit: This option denies approval and allows the user to alter the purchase order and resubmit it for approval. The disapproving user becomes the new submitting user.

Approval Menu/Log: Browse 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 are available if the 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: Approve on behalf of the current waiting-on user and move PO to the next approver in the workflow.

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

Delete: A PO cannot be deleted once has been posted. If it is posted and you must delete it, you must close the PO 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 close the selected POs.

New/Import: Opens the PO import dialogue to create multiple POs from an outside data source.

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

Refresh: Refreshes the purchase orders with the current filters.

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

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

Preview: Generates a pdf of the PO information, vendor number, bill-to, and ship-to, as well as all the identifying information and GL distribution grid details.

Word Export: This function generates a Word document containing all PO information, vendor number, bill-to, ship-to, and identifying information, as well as GL distribution grid details.

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

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

Quick Print: Depending on the 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: This opens the Advanced Print dialogue, which 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 the user's workstation settings, the PO list information can be saved in .xls format or opened in a .xls save dialogue.

For more information, see the purchase order setup and rules.