

PeopleSoft Training Document

Financials 9.2

Dispatching Purchase Orders

Functional Area	PeopleSoft Finance 9.2
Process Area	Purchasing
Processes covered in this document	1.1.1 Manually Dispatch a PO 1.1.2 Dispatch History
Process Map Reference	Unitec Processes 9.2

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Dispatching Purchase Orders

Objective

To understand the PO dispatch process at Unitec.

To understand how to manually dispatch a Purchase Order to a Supplier.

Introduction

Purchase Orders need to be dispatched to the supplier after they have been approved. This ensures that the supplier is aware of the terms and conditions associated with the transaction and that Unitec is protected from unreasonable expectations by the supplier. It also ensures that the supplier is able to cite a valid PO number on their invoice.

Unitec's Accounts Payable team is unable to enter invoices against a PO unless the PO is in the dispatched state.

Unitec's preferred dispatch method for a Purchase Order to a Supplier is by email. We encourage the suppliers to provide generic emails for this purpose rather than the email of an individual which may become invalid when this person leaves the company. Supplier contact emails are maintained by the Unitec Finance team.

Where the PO dispatch method is email, the Purchasing system will automatically dispatch an approved Purchase Order to the Supplier in a batch dispatch process set to run every two hours between 8.00am and 6.00pm.

Where Suppliers have not supplied a relevant email address to Unitec, the system will default the dispatch method to print when raising the PO and the Buyer will communicate the approved Purchase Order to the supplier via another method. In these cases the buyer will need to manually dispatch the PO.

Other methods may include: hand delivering in person, fax or by post.

Manually Dispatch a Purchase Order

STEP	MANUALLY DISPATCH A PURCHASE ORDER																																												
Path	Purchasing WorkCenter> Find an Existing Value																																												
<div>1. Find an Existing Value</div> <div>2. PO Status = Approved</div> <div>3. Buyer Name – Enter</div> <div>4. Click Search</div>	<div><div>Express Purchase Order</div><div>Enter any information you have and click Search. Leave fields blank for a list of all values.</div><div><div>Find an Existing Value1a New Value</div><div><div>▼ Search Criteria</div><div><div>Business UnitUNITC</div><div>PO IDbegins with</div><div>Purchase Order Date=</div><div>PO StatusApproved2</div><div>Short Supplier Namebegins with</div><div>Supplier IDbegins with</div><div>Supplier Namebegins with</div><div>Buyerbegins with</div><div>Buyer Namebegins withhaeyeung3</div><div>PO Type=</div><div>Purchase Order Referencebegins with</div><div>Hold From Further Processing<input type="checkbox"/></div><div><input type="checkbox"/> Case Sensitive</div><div><div>Search4ClearBasic SearchSave Search Criteria</div><div>Find an Existing Value Add a New Value</div></div></div></div></div></div>																																												
<div>If several of your orders are awaiting dispatch, you will see this screen with a list of the orders.</div> <div>1. Select an order.</div> <div>If you only have one order awaiting dispatch, you will be taken straight to the next screen</div>	<div><div><div>Buyerbegins with</div><div>Buyer Namebegins withJR</div><div>PO Type=</div><div>Purchase Order Referencebegins with</div><div>Hold From Further Processing<input type="checkbox"/></div><div><input type="checkbox"/> Case Sensitive</div><div><div>SearchClearBasic SearchSave Search Criteria</div><div>Search Results</div><div><div>View All</div><table><tr><th>Business Unit</th><th>PO ID</th><th>Purchase Order Date</th><th>PO Status</th><th>Short Supplier Name</th><th>Supplier ID</th><th>Supplier Name</th><th>Buyer</th><th>Buyer Name</th><th>PO Type</th><th>Purchase Or</th></tr><tr><td>UNITC</td><td>0002063074</td><td>28/10/2016</td><td>Approved</td><td>BICLTD-001</td><td>0000038562</td><td>BIC(NZ) LTD</td><td>JRICHARDS</td><td>jrighards</td><td>General (blank)</td><td></td></tr><tr><td>UNITC</td><td>0002062667</td><td>12/10/2016</td><td>Approved</td><td>STAMCIT-001</td><td>0000038402</td><td>Stamp City Ltd</td><td>JRICHARDS</td><td>jrighards</td><td>General (blank)</td><td></td></tr><tr><td>UNITC</td><td>0002062664</td><td>11/10/2016</td><td>Approved</td><td>FUJINO13</td><td>0000000856</td><td>Fuji Xerox NZ Ltd</td><td>JRICHARDS</td><td>jrighards</td><td>General (blank)</td><td></td></tr></table></div><div>Find an Existing Value Add a New Value</div></div></div></div>	Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Or	UNITC	0002063074	28/10/2016	Approved	BICLTD-001	0000038562	BIC(NZ) LTD	JRICHARDS	jrighards	General (blank)		UNITC	0002062667	12/10/2016	Approved	STAMCIT-001	0000038402	Stamp City Ltd	JRICHARDS	jrighards	General (blank)		UNITC	0002062664	11/10/2016	Approved	FUJINO13	0000000856	Fuji Xerox NZ Ltd	JRICHARDS	jrighards	General (blank)	
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STEP

MANUALLY DISPATCH A PURCHASE ORDER

1. Click Dispatch

Express Purchase Order

Purchase Order

Business Unit UNITC

PO ID 0002063497

PO Status Approved

POA Status Awaiting PO Dispatch

☐ Hold From Further Processing

Copy From

Header

*PO Date 16/12/2016

*Supplier ADHETEC

*Supplier ID 0000000038

*Buyer HAUYEUNG

Supplier Search

Supplier Details

Adhesive Technologies Ltd

haueyung

PO Reference Enter PO Reference here

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Header VAT

Actions

Amount Summary

Receipt Status Not Recvd

*Dispatch Method Print

Dispatch

Merchandise 70.00

Freight/Tax/Misc. 10.51

Total Amount 80.51 NZD

Calculate

Add Items From

Catalog Purchasing Kit

Item Search

Select Lines To Display

Search for Lines

Line To Retrieve

Lines

Line	Item	Description	PO Qty	*UOM	Category	Merchandise Amt	Status
1		Adhesive UHU	5.0000	EA	269500	27.50	Approved
242 characters remaining							
2		Copy paper - Reams	10.0000	EA	269500	42.50	Approved
236 characters remaining							

Expand All

Collapse All

View Printable Version

View Approvals

Go to ... More ...

Save

Return to Search

Notify

Refresh

Add

Update

1. Click

OK

Dispatch Options

Use One Ship To

Ship To INWARD_GDS

Dispatch Options

Fax Cover Page

Server Name

*Output Destination Type WEB

Output Destination Format PDF

Template ID

☐ Test Dispatch

☒ Print BU Comments

☐ Print Duplicate on PO

☐ Print Changes Only

☒ Print PO Item Description

☐ Print Copy

OK

Cancel

Refresh

1. Click Yes

Message

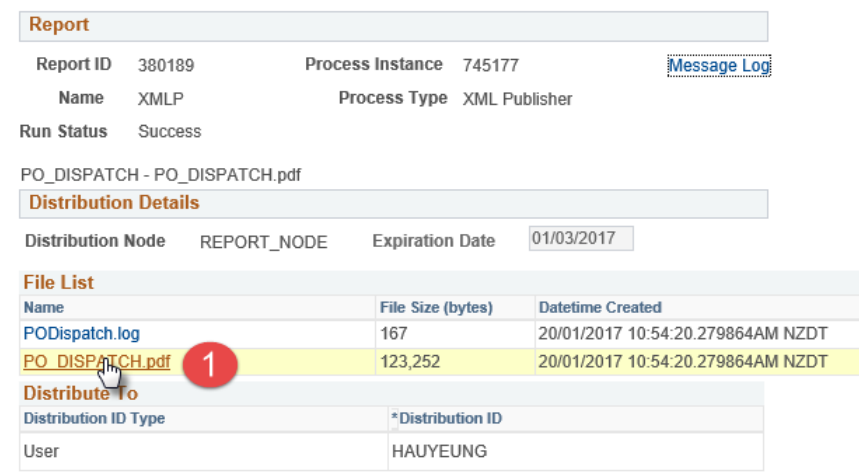
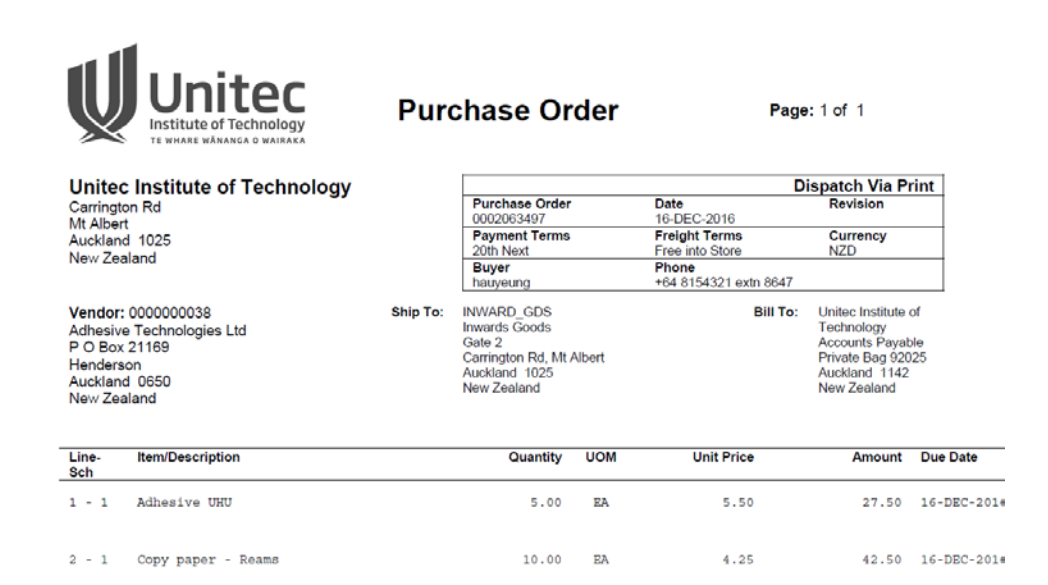
Would you like to wait for confirmation that the PO Dispatch process has completed? (10208,44)


Your request is currently in process. If you choose to wait, once the process has completed, you will be returned to the updated PO. If you choose not to wait, please check the Process Monitor to verify that the scheduled process has completed before accessing the PO being dispatched.

Yes

No

STEP	MANUALLY DISPATCH A PURCHASE ORDER	
PO Status will update 1. from Approved 2. to Dispatched	<div><div>Express Purchase Order</div><div>Purchase Order</div><div>Business Unit UNITC PO ID 0002063497</div><div>Copy From <div></div></div><div><div>Header</div><div><div>*PO Date 16/12/2016</div><div>Supplier Search</div></div><div><div>*Supplier ADHETEC</div><div>Supplier Details</div></div></div><div><div>PO Status Approved</div><div>1</div><div></div></div><div><div>POA Status Awaiting PO Dispatch</div><div><div>Hold From Further Processing</div></div></div></div> <div><div>Express Purchase Order</div><div>Purchase Order</div><div>Business Unit UNITC PO ID 0002063497</div><div>Copy From <div></div></div><div><div>Header</div><div><div>*PO Date 16/12/2016</div><div>Supplier Search</div></div><div><div>*Supplier ADHETEC</div><div>Supplier Details</div></div></div><div><div>PO Status Dispatched</div><div>2</div><div></div></div><div><div>POA Status Awaiting Acknowledgement</div><div><div>Hold From Further Processing</div></div></div><div><div>Backorder Status Not Backordered</div><div>Create BackOrder</div></div></div>	
	1. Click Report Manager	<div><div>Links</div><div><div>Procurement</div><div><div>Add/Update Express POs</div><div>Add/Update Receipts</div><div>Activity Summary</div></div><div><div>Other Links</div><div><div>Query Viewer</div><div>Report Manager 1</div><div>Process Monitor</div></div><div><div>Other WorkCenters</div><div><div>Accounts Payable WorkCenter</div><div>Accounts Receivable WorkCenter</div><div>Asset Management WorkCenter</div></div></div></div></div></div>
1. Click the .PDF file	<div><div>List Explorer Administration Archives</div><div><div>View Reports For</div><div><div>Folder</div><div>Instance</div><div>to</div><div>Refresh</div></div><div><div>Name</div><div>Created On</div><div>Last</div><div>1</div><div>Days</div></div></div><div><div>Reports</div><div>Personalize Find View All</div><div>First 1-3 of 3 Last</div><div><div>Report</div><div>Report Description</div><div>Folder Name</div><div>Completion Date/Time</div><div>Report ID</div><div>Process Instance</div></div><div><div>1 PO_DISPATCH - PO_DISPATCH.PDF</div><div>PO_DISPATCH - PO_DISPATCH.PDF</div><div>General</div><div>20/01/17 10:54AM</div><div>380189</div><div>745177</div></div><div><div>2 Match Detail Report</div><div>MATCH DETAIL REPORT</div><div>General</div><div>19/01/17 10:41PM</div><div>380118</div><div>745089</div></div><div><div>3 PO_DISPATCH - PO_DISPATCH.PDF</div><div>PO_DISPATCH - PO_DISPATCH.PDF</div><div>General</div><div>19/01/17 1:54PM</div><div>380137</div><div>745110</div></div></div></div>	

STEP	MANUALLY DISPATCH A PURCHASE ORDER
<p>1. Click .PDF</p> <p>Please note, this will only be available for retrieval for one week.</p>	
<p>2. The document opens in a new window</p> <p>This is now ready to be sent to the supplier.</p>	

	<p>PO's dispatched by email are not available for printing in this manner</p> <p>If the PO has been re-dispatched after changes, the words "Change Order" will appear in the header and the watermark.</p> <p>The same applies to cancelled purchase orders.</p>
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Dispatch History

Use this function if you want to know when a Purchase Order was dispatched.

STEP

DISPATCH HISTORY

Path

Purchasing WorkCenter

Express Purchase Order

Find an Existing Value

1. Enter PO ID number

2. Click Search

Express Purchase Order

Find an Existing Value

Add a New Value

Search Criteria

Business UnitUNITC

PO IDbegins with0002063493

Purchase Order Date

PO Status

Short Supplier Namebegins with

Supplier IDbegins with

Supplier Namebegins with

Buyerbegins with

Buyer Namebegins with

PO Type

Purchase Order Referencebegins with

Hold From Further Processing

Case Sensitive

SearchClearBasic SearchSave Search Criteria

Find an Existing Value | Add a New Value

Scroll down and click

1. Go to...

Express Purchase Order

Purchase Order

Business UnitUNITC

PO ID0002063493

Copy From

Header

PO Date09/12/2016

Supplier Search

SupplierOFFIMAX-001

Supplier Details

Supplier ID0000024284

OfficeMax New Zealand Ltd

BuyerHAUYEUNG

hauyeung

PO ReferenceStationery order for December

Header Details

Activity Summary

PO Defaults

Edit Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Header VAT

Amount Summary

Merchandise301.27

Freight/Tax/Misc.45.19

Total Amount346.46NZD

Backorder StatusNot Backordered

Create BackOrder

Receipt StatusReceived

Dispatch

Dispatch MethodEmail

Hold From Further Processing

230 characters remaining

Card - A4 white - sheets

3.0000EA2695000.69Approved

230 characters remaining

Stabilo Boss Highlighter - Green

6.0000EA2695007.44Approved

222 characters remaining

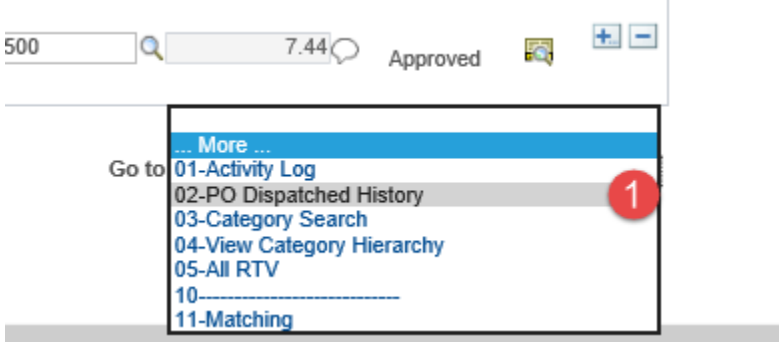
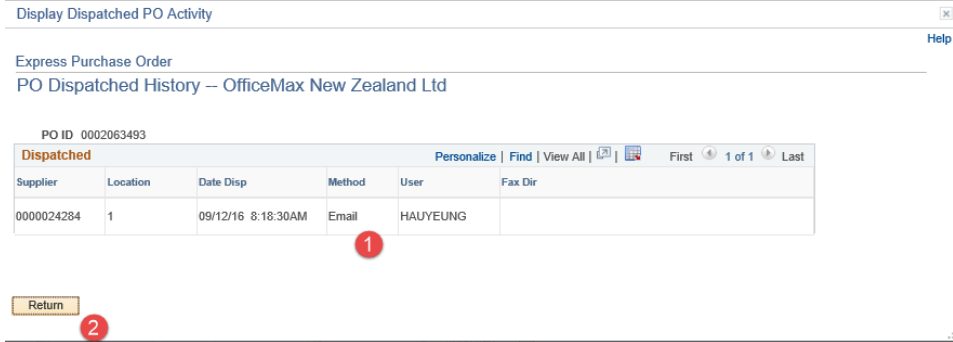
Expand All

Collapse All

View Printable Version

View Approvals

Go to ... More ...

STEP	DISPATCH HISTORY
1. Select PO dispatched History	
1. Dispatch information is displayed – method, date and time 2. Click Return	

Acknowledging a Dispatched Purchase Order

Although there is a feature within the PO **Awaiting Acknowledgement**, to record the supplier acknowledgement, this is not currently used at Unitec.