# Quick Guide for PeopleSoft Buyer

## Buyer – Create a Purchase Order – Quantity

| Step | Action |
| --- | --- |
| 1. | Purchasing Workcenter / Add/Update Express POs |
| 2. | Click Add a New Value |
| 3. | Click Add |
| 4. | **Header section -** Enter<br>• Supplier<br>• Buyer<br>• PO Reference |
| 5. | Justification - Add Comments |
| 6. | Lookup Category |
| 7. | **Expand line** Enter<br>• **Schedules**<br>• Unit Price |
| 8. | Add a new line – Line section<br><br>Click **+** |
| 9. | Click Calculate |
| 10. | Click Save |

## Buyer - Create a Purchase Order for Services – Value

| Step | Action |
|---|---|
| 1. | Purchasing Workcenter / Add/Update Express POs |
| 2. | Click Add a New Value |
| 3. | Click Add |
| 4. | Header section - Enter<br>• Supplier<br>• Buyer<br>• PO Reference |
| 5. | Justification - Add Comments |
| 6. | Add Items – Line 1<br><br>Click |
| 7. | Enter Description |
| 8. | Expand Attributes Section<br>Physical Nature = Services |
| 9. | Check ☑ Amount Only |
| 10. | Click OK |
| 11. | Click Yes |
| 12. | Submit for Approval<br>Click Save |

## Place a PO on Hold

Input data into your PO

| Step | Action |
|---|---|
| 1. | Check ☑ Hold From Further Processing |
| 2. | Click Save |

## Retrieve an on Hold PO

In Purchasing WorkCenter

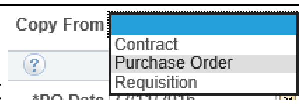
| Step | Action |
|---|---|
| 1. | Click Alerts / Purchase Orders On Hold (1) |
| 2. | Check PO to process |
| 3. | Edit PO as required |
| 4. | Uncheck Hold From Further Processing |
| 5. | Click Save |

## Splitting PO between GL Codes

When creating the PO -

| Step | Action |
|---|---|
| 1. | Expand Schedules line |
| 2. | Add a new line – scroll to the right<br>Click + |
| 3. | Confirm number of rows - OK |
| 4. | Select *Distribute by Amount / Quantity |
| 5. | Enter dollar value |
| 6. | Look up Dept Code |
| 7. | Amount Summary<br>Click Calculate |
| 8. | Click Save |

# Copy a PO

| Step | Action |
|---|---|
| 1. | Purchasing Workcenter / Add/Update Express POs |
| 2. | Add a New Value<br>Click Add |
| 3. | Select  |
| 4. | Enter dollar value |
| 5. | Look up Dept Code |
| 6. | Amount Summary<br>Click Calculate |