

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 1.1.3 Acknowledging a Dispatch PO
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 Value1Add a New Value</div><div><div>▼ Search Criteria</div><div><div>Business Unit =UNITC</div><div>PO ID begins with</div><div>Purchase Order Date =</div><div>PO Status =Approved2</div><div>Short Supplier Name begins with</div><div>Supplier ID begins with</div><div>Supplier Name begins with</div><div>Buyer begins with</div><div>Buyer Name begins withhauyeung3</div><div>PO Type =</div><div>Purchase Order Reference begins with</div><div>Hold From Further Processing</div><div><div>Case Sensitive</div></div><div><div>Search4ClearBasic SearchSave Search Criteria</div></div><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>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>Buyer begins with</div><div>Buyer Name begins withJR</div><div>PO Type =</div><div>Purchase Order Reference begins with</div><div>Hold From Further Processing</div><div><div>Case Sensitive</div></div><div><div>SearchClearBasic SearchSave Search Criteria</div></div></div><div><div>Search Results</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>richards</td><td>General</td><td>(blank)</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>richards</td><td>General</td><td>(blank)</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>richards</td><td>General</td><td>(blank)</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	richards	General	(blank)	UNITC	0002062667	12/10/2016	Approved	STAMCIT-001	0000038402	Stamp City Ltd	JRICHARDS	richards	General	(blank)	UNITC	0002062664	11/10/2016	Approved	FUJINO13	0000000856	Fuji Xerox NZ Ltd	JRICHARDS	richards	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

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><div>Business Unit UNITC</div><div>PO ID 0002063497</div></div><div><div>Copy From</div><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><input type="checkbox"/> Hold From Further Processing</div></div></div> <div><div>Express Purchase Order</div><div>Purchase Order</div><div><div>Business Unit UNITC</div><div>PO ID 0002063497</div></div><div><div>Copy From</div><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><div><div>POA Status Awaiting Acknowledgement</div><div><input type="checkbox"/> Hold From Further Processing</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>▼ Other Links</div><div><div>Query Viewer</div><div>Report Manager 1</div><div>Process Monitor</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>
1. Click the .PDF file	<div><div>List Explorer Administration Archives</div><div><div>View Reports For</div><div><div>Folder</div><div></div><div>Instance</div><div></div><div>to</div><div></div><div>Refresh</div></div><div><div>Name</div><div></div><div>Created On</div><div></div><div>Last</div><div></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>1</div><div>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</div><div>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</div><div>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

1. Click .PDF

Report

Report ID380189

Process Instance745177

[Message Log](#)

NameXMLP

Process TypeXML Publisher

Run StatusSuccess

PO_DISPATCH - PO_DISPATCH.pdf

Distribution Details

Distribution NodeREPORT_NODE

Expiration Date01/03/2017

File List


Name	File Size (bytes)	Datetime Created
PODispatch.log	167	20/01/2017 10:54:20.279864AM NZDT
PO_DISPATCH.pdf	123,252	20/01/2017 10:54:20.279864AM NZDT

Distribute To

Distribution ID Type	*Distribution ID
User	HAUYEUNG

2. The document opens in a new window

This is now ready to be sent to the supplier.



Unitec

Institute of Technology

TE WHARE WĀNANGA O WAIKAKA

Unitec Institute of Technology

Carrington Rd

Mt Albert

Auckland 1025

New Zealand

Vendor: 0000000038

Adhesive Technologies Ltd

P O Box 21169

Henderson

Auckland 0650

New Zealand

Purchase Order

Dispatch Via Print		
Purchase Order	Date	Revision
0002063497	16-DEC-2016	
Payment Terms	Freight Terms	Currency
20th Next	Free into Store	NZD
Buyer	Phone	
hauyeung	+64 8154321 extn 8647	

Ship To:

INWARD_GDS

Inwards Goods

Gate 2

Carrington Rd, Mt Albert

Auckland 1025

New Zealand

Bill To:

Unitec Institute of Technology

Accounts Payable

Private Bag 92025

Auckland 1142

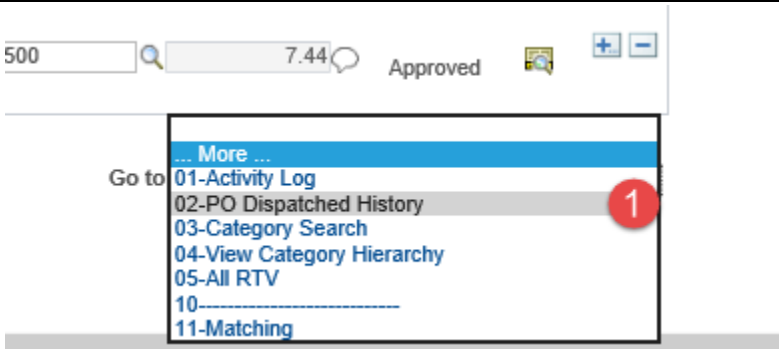
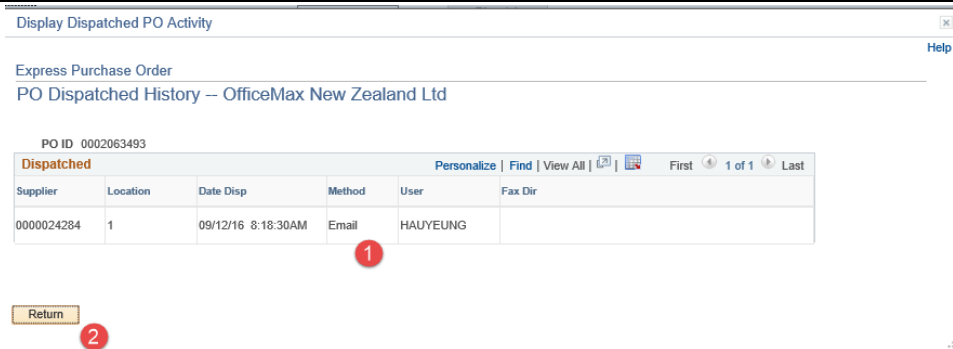
New Zealand

Line-Sch	Item/Description	Quantity	UOM	Unit Price	Amount	Due Date
1 - 1	Adhesive UHU	5.00	EA	5.50	27.50	16-DEC-2016
2 - 1	Copy paper - Reams	10.00	EA	4.25	42.50	16-DEC-2016

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	<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 Value</div><div>Add a New Value</div></div><div><div>Search Criteria</div><div><div>Business Unit</div><div>=</div><div>UNITC</div><div></div></div><div><div>PO ID</div><div>begins with</div><div>0002063493</div><div>x</div><div>1</div></div><div><div>Purchase Order Date</div><div>=</div><div></div><div>BT</div></div><div><div>PO Status</div><div>=</div><div></div><div></div></div><div><div>Short Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Supplier ID</div><div>begins with</div><div></div><div></div></div><div><div>Supplier Name</div><div>begins with</div><div></div><div></div></div><div><div>Buyer</div><div>begins with</div><div></div><div></div></div><div><div>Buyer Name</div><div>begins with</div><div></div><div></div></div><div><div>PO Type</div><div>=</div><div></div><div></div></div><div><div>Purchase Order Reference</div><div>begins with</div><div></div><div></div></div><div><div>Hold From Further Processing</div><div><input type="checkbox"/></div></div><div><div>Case Sensitive</div><div><input type="checkbox"/></div></div><div><div>Search</div><div>2</div><div>Clear</div><div>Basic Search</div><div></div><div>Save Search Criteria</div></div><div><div>Find an Existing Value</div><div>Add a New Value</div></div></div></div> <tr><td>Scroll down and click 1. Go to...</td><td><div><div>Express Purchase Order</div><div>Purchase Order</div><div><div>Business Unit</div><div>UNITC</div><div>PO ID</div><div>0002063493</div><div>PO Status</div><div>Dispatched</div><div></div><div></div><div>POA Status</div><div>Awaiting Acknowledgement</div><div><input type="checkbox"/> Hold From Further Processing</div></div><div><div>Copy From</div><div></div><div>Header</div><div><div>*PO Date</div><div>09/12/2016</div><div>Supplier Search</div><div>*Supplier</div><div>OFFIMAX-001</div><div>Supplier Details</div><div>*Supplier ID</div><div>0000024284</div><div>OfficeMax New Zealand Ltd</div><div>*Buyer</div><div>HAUYEUNG</div><div>haueung</div><div>Create BackOrder</div></div><div><div>PO Reference</div><div>Stationery order for December</div><div>Backorder Status</div><div>Not Backordered</div><div>Receipt Status</div><div>Received</div><div>*Dispatch Method</div><div>Email</div><div>Dispatch</div><div>Amount Summary</div><div><div>Merchandise</div><div>301.27</div><div>Freight/Tax/Misc.</div><div>45.19</div><div>Total Amount</div><div>346.46</div><div>NZD</div><div>Calculate</div></div><div><div>Header Details</div><div>Activity Summary</div><div>PO Defaults</div><div>Edit Comments</div><div>PO Activities</div><div>Add ShipTo Comments</div><div>Requisitions</div><div>Document Status</div><div>Header VAT</div><div>Actions</div></div><div><div>4</div><div>230 characters remaining</div><div>Card - A4 white - sheets</div><div>3.0000</div><div>EA</div><div>269500</div><div>0.69</div><div>Approved</div><div>5</div><div>230 characters remaining</div><div>Stabilo Boss Highlighter - Green</div><div>6.0000</div><div>EA</div><div>269500</div><div>7.44</div><div>Approved</div><div>6</div><div>222 characters remaining</div></div><div><div>Expand All</div><div>Collapse All</div><div>View Printable Version</div><div>View Approvals</div><div>Go to ... 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Go to...	<div><div>Express Purchase Order</div><div>Purchase Order</div><div><div>Business Unit</div><div>UNITC</div><div>PO ID</div><div>0002063493</div><div>PO Status</div><div>Dispatched</div><div></div><div></div><div>POA Status</div><div>Awaiting Acknowledgement</div><div><input type="checkbox"/> Hold From Further Processing</div></div><div><div>Copy From</div><div></div><div>Header</div><div><div>*PO Date</div><div>09/12/2016</div><div>Supplier Search</div><div>*Supplier</div><div>OFFIMAX-001</div><div>Supplier Details</div><div>*Supplier ID</div><div>0000024284</div><div>OfficeMax New Zealand Ltd</div><div>*Buyer</div><div>HAUYEUNG</div><div>haueung</div><div>Create BackOrder</div></div><div><div>PO Reference</div><div>Stationery order for December</div><div>Backorder Status</div><div>Not Backordered</div><div>Receipt Status</div><div>Received</div><div>*Dispatch Method</div><div>Email</div><div>Dispatch</div><div>Amount Summary</div><div><div>Merchandise</div><div>301.27</div><div>Freight/Tax/Misc.</div><div>45.19</div><div>Total Amount</div><div>346.46</div><div>NZD</div><div>Calculate</div></div><div><div>Header Details</div><div>Activity Summary</div><div>PO Defaults</div><div>Edit Comments</div><div>PO Activities</div><div>Add ShipTo Comments</div><div>Requisitions</div><div>Document Status</div><div>Header VAT</div><div>Actions</div></div><div><div>4</div><div>230 characters remaining</div><div>Card - A4 white - sheets</div><div>3.0000</div><div>EA</div><div>269500</div><div>0.69</div><div>Approved</div><div>5</div><div>230 characters remaining</div><div>Stabilo Boss Highlighter - Green</div><div>6.0000</div><div>EA</div><div>269500</div><div>7.44</div><div>Approved</div><div>6</div><div>222 characters remaining</div></div><div><div>Expand All</div><div>Collapse All</div><div>View Printable Version</div><div>View Approvals</div><div>Go to ... 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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.