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

Contents

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

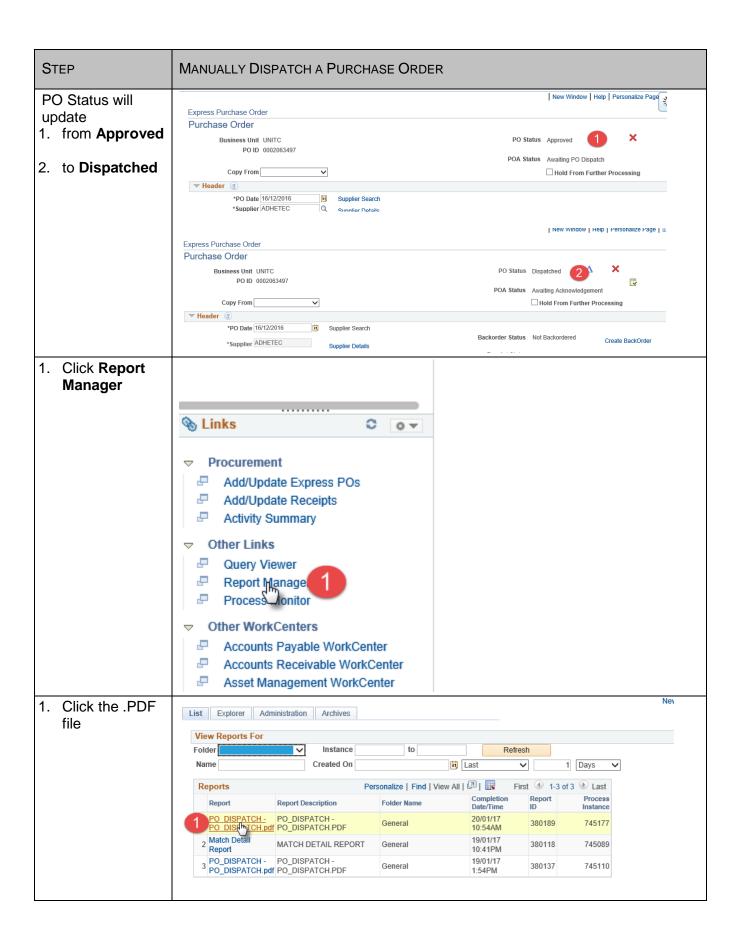| STEP	MANUALLY DISPATCH A PURCHASE ORDER
Path	Purchasing WorkCenter> Find an Existing Value
1. Find an Existing Value 2. PO Status = Approved 3. Buyer Name – Enter 4. Click Search	**Express Purchase Order** Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value ① a New Value ▼ Search Criteria Business Unit = ∨ UNITC 🔍 PO ID begins with ∨ Purchase Order Date = ∨ 📅 PO Status = ∨ Approved ∨ ② Short Supplier Name begins with ∨ 🔍 Supplier ID begins with ∨ 🔍 Supplier Name begins with ∨ 🔍 Buyer begins with ∨ 🔍 Buyer Name begins with ∨ hauyeung ✕ 🔍 ③ PO Type = ∨ ∨ Purchase Order Reference begins with ∨ Hold From Further Processing ☐ ☐ Case Sensitive Search Clear Basic Search 🔲 Save Search Criteria ④ Find an Existing Value ǀ Add a New Value
If several of your orders are awaiting dispatch, you will see this screen with a list of the orders. Select an order. If you only have one order awaiting dispatch, you will be taken straight to the next screen	Buyer begins with ∨ 🔍 Buyer Name begins with ∨ JR 🔍 PO Type = ∨ ∨ Purchase Order Reference begins with ∨ Hold From Further Processing ☐ ☐ Case Sensitive Search Clear Basic Search 🔲 Save Search Criteria Search Results View All | Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	Buyer Name	PO Type	Purchase Or
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UNITC	0002063074	28/10/2016	Approved	BICLTD-001	0000038562	BIC(NZ) LTD	JRICHARDS	jrichards	General	(blank)
UNITC	0002062667	12/10/2016	Approved	STAMCIT-001	0000038402	Stamp City Ltd	JRICHARDS	jrichards	General	(blank)
UNITC	0002062664	11/10/2016	Approved	FUJINO13	0000000856	Fuji Xerox NZ Ltd	JRICHARDS	jrichards	General	(blank)	 Find an Existing Value ǀ Add a New Value

STEP	MANUALLY DISPATCH A PURCHASE ORDER
1. Click Dispatch	
1. Click **OK**	
1. Click **Yes**	

STEP	MANUALLY DISPATCH A PURCHASE ORDER
PO Status will update 1. from **Approved** 2. to **Dispatched**	
1. Click **Report Manager**	
1. Click the .PDF file	

STEP	MANUALLY DISPATCH A PURCHASE ORDER
1. Click .PDF	**Report** Report ID 380189 Process Instance 745177 Message Log Name XMLP Process Type XML Publisher Run Status Success PO_DISPATCH - PO_DISPATCH.pdf **Distribution Details** Distribution Node REPORT_NODE Expiration Date 01/03/2017 **File List** <table><tr><th>Name</th><th>File Size (bytes)</th><th>Datetime Created</th></tr><tr><td>PODispatch.log</td><td>167</td><td>20/01/2017 10:54:20.279864AM NZDT</td></tr><tr><td>PO_DISPATCH.pdf ①</td><td>123,252</td><td>20/01/2017 10:54:20.279864AM NZDT</td></tr></table>**Distribute To** <table><tr><th>Distribution ID Type</th><th>*Distribution ID</th></tr><tr><td>User</td><td>HAUYEUNG</td></tr></table>
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 WAIRAKA **Purchase Order** Page: 1 of 1 **Unitec Institute of Technology** Carrington Rd Mt Albert Auckland 1025 New Zealand Dispatch Via Print <table><tr><td>**Purchase Order** 0002063497</td><td>**Date** 16-DEC-2016</td><td>**Revision**</td></tr><tr><td>**Payment Terms** 20th Next</td><td>**Freight Terms** Free into Store</td><td>**Currency** NZD</td></tr><tr><td>**Buyer** hauyeung</td><td colspan="2">**Phone** +64 8154321 extn 8647</td></tr></table> **Vendor:** 0000000038 Adhesive Technologies Ltd P O Box 21169 Henderson Auckland 0650 New Zealand **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 <table><tr><th>Line-Sch</th><th>Item/Description</th><th>Quantity</th><th>UOM</th><th>Unit Price</th><th>Amount</th><th>Due Date</th></tr><tr><td>1 - 1</td><td>Adhesive UHU</td><td>5.00</td><td>EA</td><td>5.50</td><td>27.50</td><td>16-DEC-2016</td></tr><tr><td>2 - 1</td><td>Copy paper - Reams</td><td>10.00</td><td>EA</td><td>4.25</td><td>42.50</td><td>16-DEC-2016</td></tr></table>

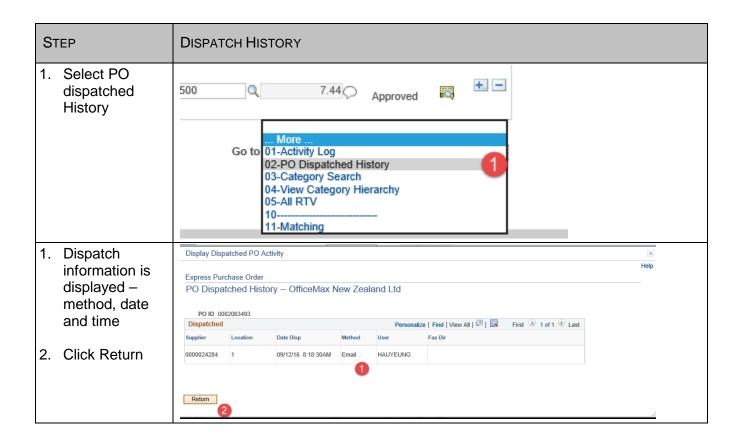## Dispatch History

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	
Scroll down and click 1. Go to…	

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.