# New employee to PSSC-How do you write a PO? (80% rule)

1. Fiscal Officer (FO) gets eRequest from unit-checks it for the following and assigns to self:
    a. Business purpose
    b. Chartfield information (if chartfield information is completely off {mainly the account code} for what is being purchased please change it, if not it can stay where it is)
    c. Quote, pricing, ect.
    d. Approvals
2. Go into PeopleSoft to create PO
3. Purchasing
4. Purchase Order
5. Maintain PO
6. Add-PO
7. PO Form Tab:
    a. Vendor look up
        i. Type in name (pick appropriate vendor)
8. Type in Buyer
9. Add PR# in box
10. Header Details Tab:
    a. You can change PO Type
    b. Change method of processing-Fax/Print/Phone
    c. Add in contract type/then contract number
11. Defaults:
    a. Ship To-leave at 381 but if you need to change, change it to the appropriate ship to code
    b. Due Date-depends on what type of PO: goods or services (this can change your due date)
    c. Ship Via-if you need to change-pick appropriate shipping
    d. Freight Terms Code-if you need to change-pick appropriate freight terms
    e. Category-pick the best category that fits what is being purchased: goods/services
    f. Unit of Measure-pick the appropriate unit of measure: example EA (Each)
    g. Next enter in chartfield from eRequest (Distribution Line)
        i. Change location to the location on the eRequest this is the products final destination.
    h. Hit OK
12. Header Comments:
    a. Click [send to vendor] and [shown at receipt]
    b. Add in 1st Header Comment:
        i. Quote number or appropriate pricing information
        ii. Contact information from eRequest
        iii. PR# and/or T# if applicable
        iv. Any other important information that is needed to go to the vendor
    c. You can add additional Header Comments if needed
13. Lines:
    a. Description-taken from description from the quote or description from eRequest

   b. PO Quantity-Number from the eRequest or quote
   c. Schedule Tab
      i. Add in Pricing
   d. Back to PO Form
14. More-drop down arrow:
    a. Matching-change and check if needed
15. SAVE
16. Click GREEN Checkmark
17. More-drop down arrow
    a. Preview PO-look at PO, if need to make changes go back to PO and make changes, if not Save PO
18. Attach PO to eRequest
19. Sent to Lead for approval
20. Lead Approves

What does Purchasing look for:

- Purchasing looks at everything the Fiscal Officer and Leads look at.
  - Is this an eStores vendor
  - Is the category correct (if not, they change the category but don't let the FO know it has been changed)
  - Look at all the attachments in the eRequest-this includes the pricing (quote) information
- Attached quotes, an email stating the pricing from vendor or if there is a comment stating the pricing from vendor is all accepted in Purchasing.
- Purchasing does like an updated fax number or email address so they are able to send the PO to the vendor.
- Bid Waivers:
  - For the Bid Waiver Form-Purchasing asks that the FO/Leads make sure the form is filled out correctly. This includes:
    - Making sure the correct person signed the form
    - The ORG/Fund is filled in
    - The vendor name is on the form
  - Addition to the form, the unit must provide the justification letter explaining the reason they are going with this vendor for the good or service.