

Create a Purchase Order Template

Navigation: **Purchasing > Purchase Orders > Maintain Purchase Orders**

1. **'Add a New Value'** – Enter/Verify Business Unit (BU).
2. Where 'Next' should be enter 'TMPLT-(short name of the vendor or buyer).
3. Next. Click 'Add'.
4. Select vendor number 9999999999, named 'FIND A VENDOR'.
5. Select a buyer.
6. Click the Defaults hyperlink. Enter all default information such as Ship To, Due Date, Category, UOM, and Distributions. Click OK.
7. Click Header Details hyperlink to enter information into the PO Ref. This will display when you inquire or do a search.
8. Verify the billing address.
9. Select the correct Origin.
10. Verify that the Tax Exempt ID is correct and selected.
11. Verify that the Hold From Further Processing option is selected. This creates the template.
12. Verify that the Dispatch option is selected.
13. Select method = Print.
14. Accounting Template = Standard
15. Acctg Date = Current Date.
16. Click OK.
17. Enter a Description of XXXXXXXX.
18. Enter a Quantity of '1'.
19. Enter a UOM of 'EA'.
20. Enter a Category of 00505.
21. Click the Schedule Tab. Check the Ship to, UOM, Distribution, etc.
22. Click Save