

Generating a Purchase Order (ZG) from Blanket Order for Stock (ZC)

Overview

The Blanket Order for Stock is non-encumbering and not budget checked. Purchase Orders will be generated from the Blanket Order to replenish stock. The end user can generate multiple Purchase Orders from a single Blanket Order.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

Navigation

Click Roles, Inventory.

Inventory > Inventory Purchasing – Statewide > Stock Purchase Order > Gen Stock PO (ZG) from Blanket Order (ZC)

Steps

Generate a PO from an Existing Blanket Order for Stock

Start this instruction from the Gen PO (ZG) from Blanket Order (ZC) - Work with Order Release window.

The screenshot displays the PeopleSoft interface for generating a purchase order. The window title is "Gen Stock PO (ZG) from Blanket Order (ZC) - Work With Order Release". The interface includes a search form with the following fields: Supplier, Order Number, Inventory Number, and Account Number. A "Business Unit" dropdown menu is located to the right of the Order Number field. Below the form, there is a table with the following columns: Order Number, Or Ty, Order Id, Clig Order, Line Number, 2nd Mem Number, Quantity Open, UOM, Amount Open, Request Date, and Descri. The table currently displays "No records fetched." and a "Customize Grid" button is visible in the top right corner of the table area.

 Enter any known information in the header or QBE line to minimize the search.

1. Click **Find**.

Order Number	Or Ty	Order Fd	Chg Order	Line Number	2nd Item Number	Quantity Open	UOM	Amount Open	Request Date	Descr
11220	ZC	10000	000	2.000	64075-723755	4125.0000	EA	41,250.00	12/21/2004	pa
11220	ZC	10000	000	10.000	64050-340500	74.0000	TB	5,476.00	12/21/2004	pa
11220	ZC	10000	000	12.000	64060-651003	75.0000	PK	1,008.75	12/21/2004	pa
11246	ZC	10000	000	1.000	20032-200956	830.0000	CS	21,380.80	03/18/2005	bric
11246	ZC	10000	000	2.000	20032-200451	100.0000	CS	2,490.00	03/18/2005	bric
11246	ZC	10000	000	8.000	20032-872507	100.0000	CS	5,150.00	03/18/2005	slip
11246	ZC	10000	000	9.000	20032-200840	100.0000	CS	3,057.00	03/18/2005	bric
11246	ZC	10000	000	14.000	20032-200709	815.0000	CS	21,882.75	03/18/2005	bric

2. Choose the desired **Order Number** and **Detail Line** on the grid.
3. Click **Row, Order Release**. The Gen PO (ZG) from Blanket Order (ZC) – Order Release window appears.

Supplier: 500017 AMSAN NOGG CHEMICAL & PAPER Branch/Plant: 2505002W

Buyer: 578679 KATHY DEVRIES

Ship To: 559783 FACILITY, MULTIPLE ADDRESSES

Order Number: 11220 ZC 10000 000 2.000

Release Information:

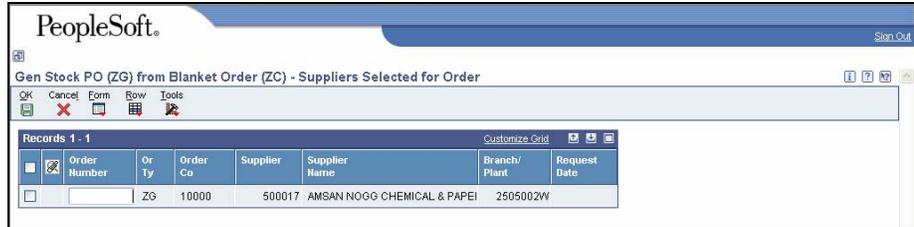
Release Qty	4125.0000	EA	Release Amt	41,250.00
Qty To Date			Amt To Date	
Original Qty	4125.0000		Original Amt	41,250.00
Unit Cost	10.0000	Purchasing UOM	EA	Line Type 8

4. Change desired fields as necessary on the Header:
 - **Buyer** – If a different buyer will be managing the Purchase Order that is created from the Service Contract
 - **Ship To** – If the services will be provided at a location other than the one defined on the Service Contract
5. Change the following field on the Release Information tab:
 - **Release Qty** – Change to the amount required to replenish the stock
6. Change the following field on the Dates tab:
 - **Requested** – date to receive Services based if this differs from the information on the Service contract
7. Click **OK**. The Work with Order Release window appears.

 Additional line items can be released to the new Purchase Order prior to its generation. To do this, repeat steps 1 – 6.

 If you want to review the contract before it is generated, continue to the next step, otherwise skip to Step 12.

8. Click **Form, Review Order**. The Gen PO (ZG) from Blanket Order (ZC) – Supplier Selected for Order window appears.



9. Choose the order(s) to review prior to generation.
10. Click **Row, Details**. The Gen Stock PO (ZG) from Blanket Order (ZC) – Items Selected for Order window appears.



11. Click **Cancel** to return to the Gen PO (ZG) from Blanket Order (ZC) – Suppliers Selected for Order window.
12. Click **Form, Generate Order**. The Gen PO (ZG) from Blanket Order (ZC) Generated Purchase Orders window appears.



 The new Order Number and Or Ty (Order Type) will appear and should be recorded for future use.

13. The newly generated purchase order will need to be revised to update the Send Invoice To field and remove the Cancel Date. To make these revisions click **Row, Open Order Inquiry**. The Work with Order Details window appears.

PeopleSoft
Gen Comm PO (OG) from Contract (OC) - Work With Order Details

Order Number: 112773 | BranchPlant: 65050008

Order Number	Quantity To Receive	UM	Amount To Receive	Ship To	Or Ty	Order Id	Change Order	Supplier Number	Supplier Name
112773	1.0000	M	39.60	557768	OG	56512	000	507000	AMERICAN MINORITY BUSINESS F

14. Choose the document and click **Row, Header Revision**. The Order Header window appears.

PeopleSoft
Gen Comm PO (OG) from Contract (OC) - Order Header

Order Number: 112773 | Business Unit: 65050008

Address Numbers

Supplier: 507000 AMERICAN MINORITY BUSINESS FOR
 Ship to: 557768 DAS MATERIEL - STATE PRINT SHG
 Buyer: 1117504 JOE, GI
 Send Invoice To: 250011 DAS MATERIEL

Dates

Order Date: 03/23/2007
 Requested: 03/23/2007
 Promised Delivery: 03/23/2007
 Cancel Date: 06/15/2008

Print Remark: CA-5990A
 Description: Pressure Seal Forms

Tax Expt Code: | Hold Code: BLANK - HOLD CODES 424HC
 Tax Rate/Area: | Approval Code: 1117504
 Certificate: | Retainage %:
 Tax ID: 411725179 | Ordered By: NISLMILLER
 Person/Corp. ID: C | Order Taken By:
 Payment Terms: | AIA Document: Y

Messages

15. Update the following fields:

- **Send Invoice To** - delete the information from this field and press the tab key. The correct Send Invoice To address book number will default. This can be overridden with another address book number if needed.
- **Cancel Date** - remove the cancel date.

16. Click **Form, Header to Detail, Populate**.

17. Click **OK**. The Order Detail window appears.

18. Click **OK** to return to the Work with Order Details window.

19. Click **Close** to return to the Generated Purchase Orders window.

20. Click **Close** to return to the Work with Order Release window.

21. Click **Close** to return to the menu.