

Entering a Purchase Order Direct

Overview

Under certain circumstances, a purchase order for commodities may be entered directly without the requirement of requisition or quote. The purchase order value must be less than \$10,000 and cannot have a pre-established commodity contract. Purchase Orders greater than \$2000 must have three competitive bids documented as a second text attachment on the Order Header.

This work instruction shows how to [Enter a Purchase Order Directly](#).

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.

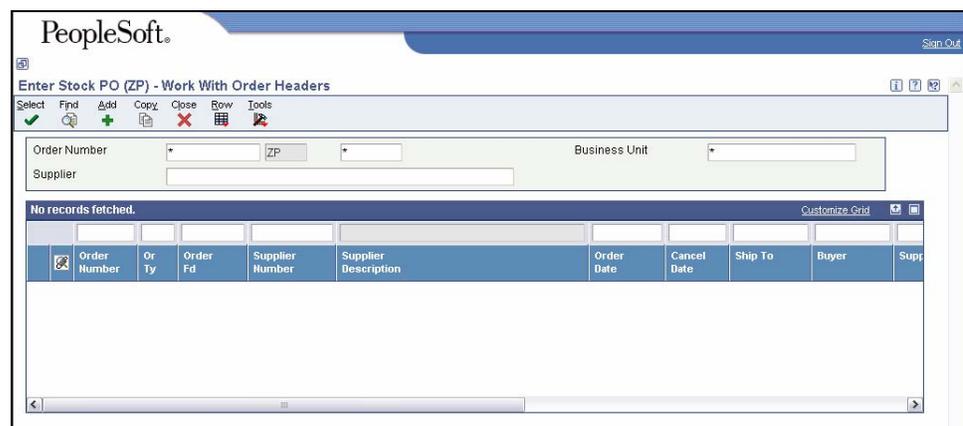
(Citrix users – right click on the menu, choose Apply Roles, choose Procurement.)

Inventory > Inventory Purchasing - Statewide > Stock Purchase Order > Enter Stock PO (ZP)

Steps

Enter a Purchase Order Directly

Start this instruction from the Work with Order Headers window.



Order Number	Order Ty	Order Id	Supplier Number	Supplier Description	Order Date	Cancel Date	Ship To	Buyer	Supp
No records fetched.									

1. Click **Add**. The Order Header window appears.

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Enter Stock PO (ZP) - Order Header

Order Number ZP Business Unit

Address Numbers		Dates	
Supplier	<input type="text"/>	Order Date	<input type="text"/>
Ship to	<input type="text"/>	Requested	<input type="text"/>
Buyer	<input type="text"/>	Promised Delivery	<input type="text"/>
Invoice To	<input type="text"/>	Cancel Date	<input type="text"/>
Pmt Remark	<input type="text"/>		
Description	<input type="text"/>		
Print Message	<input type="text"/>		

Tax Expt Code	<input type="text"/>	Hold Code	<input type="text"/> BLANK - HOLD CODES 42/HC
Tax Rate/Area	<input type="text"/>	Approval Code	<input type="text"/>
Certificate	<input type="text"/>	Retainage %	<input type="text"/>
Tax ID	<input type="text"/>	Ordered By	NLSMILLER
Person/Corp. ID	<input type="text"/>	Order Taken By	<input type="text"/>
Payment Terms	<input type="text"/>	AIA Document	<input type="text"/> Y

Messages

2. Complete the following fields:

- **Branch/Plant** - Warehouse accountable for the order
- **Supplier Number** - enter the Address Book number of the vendor from whom you will purchase the goods.
- **Ship To** - address to which the goods are to be delivered or the location where services are to be performed.
 - The Ship To number will automatically populate the Send Invoice To field.
 - Your login ID will default to the Ordered By field.
- **Requested Date** - Enter the date when you want the purchase order to be filled or delivered
 - Today's date will automatically populate in the **Order Date** field. If the Requested Date is not filled in, it will default to today's date as well.
- **Promised Delivery** – Enter the date that the supplier promised to deliver this order. The system uses this date in conjunction with the receipt date to evaluate supplier performance.
- **Cancel Date** – Enter the date that the order should be cancelled if the goods have not been sent to the customer or the goods have not been received from the supplier. (Recommend date to be two (2) months after the promised delivery date.)

3. Click **OK**. The Order Detail window will appear.

- The Order Number will display in the upper Order Detail tab.

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Enter Stock PO (ZP) - Order Detail

Order Detail | Line Defaults

Order Number: 46337 ZP 56541 Business Unit: 6505100W

Supplier: 500008 CORNHUSKER PRINTING CO Order Revision:

Ship To: 558282 HHSS - BEATRICE STATE DEVELOPM Order Date: 03/21/2006

Hold Code: BLANK - HOLD CODES 42/HC

Retainage %:

Records 1 - 1

NIGP Number/ Inventory Number	3 - Digit NIGP	NIGP Sub	Quantity Ordered	Tr. UoM	Unit Cost	Extended Cost	Pu. UoM	Description 1

4. Complete the following information in the grid:

- **NIGP Number/Inventory Number** - represents the NIGP commodity code (11 digit stock number) for items to be purchased. This field will not print on the purchasing documents.
- **Quantity Ordered** - Enter the quantity of the item that you require
- **Tr. UoM** – Transaction Unit of Measure. Automatically populates based on the 11 digit stock number.
- **Unit Cost** - the estimated cost per unit. If left blank this field will automatically populate.
- **Ln Ty** – Defaults **S** for Stock items; end-user can add a **T** Line type that indicates the Line is text information.
- **Description 1** - Automatically populates based on Inventory Number.
- **Description 2** – Automatically populates based on Inventory Number.
- **Account Number** - Automatically populates based on G/L class code tied to Inventory Number
- **3-digit NIGP** - Automatically populates
- **NIGP Sub** – Automatically populates
- Other fields as required by your agency
- Line Attachments: Text (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)
- Line Attachments: OLE (to Detail Lines) if desired. (Please refer to the work instructions to Enter Attachments to Detail Lines)

5. Use the down arrow on the keyboard to move the cursor to the next line if required

 Additional fields will be defaulted in, such as Extended Cost and Line Type.

 If you have additional items to order, repeat steps 4 and 5 until the order is complete.



The new Order Number and Or Ty (ZP) will appear and should be noted if you wish to do more work with them or facilitate searches later.

6. Click **OK** to return to the Order Header window.
7. Click **Cancel** to return to the Work with Header screen.
8. Click **Close**.