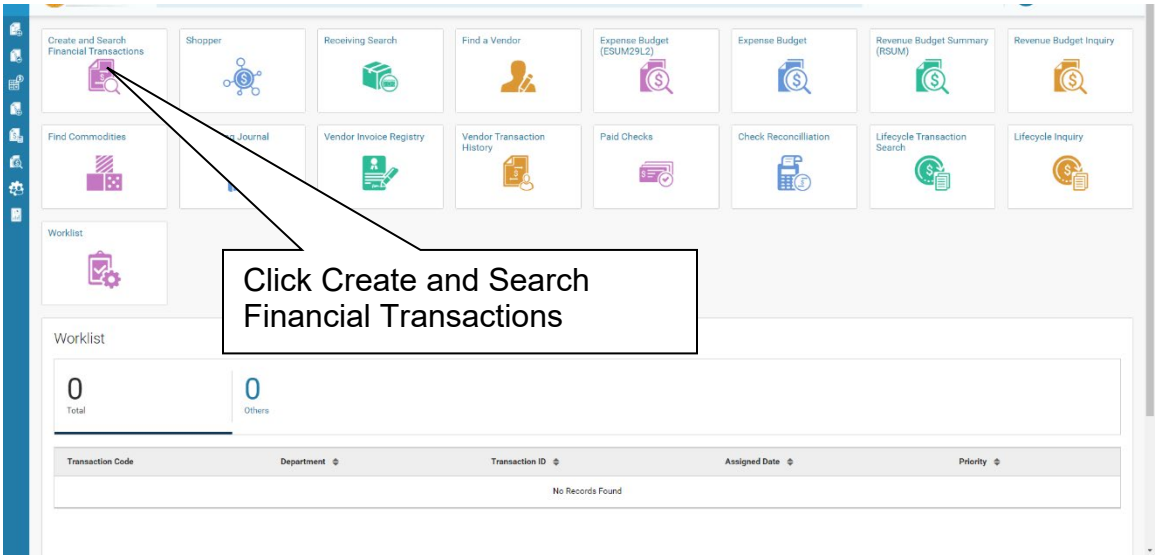
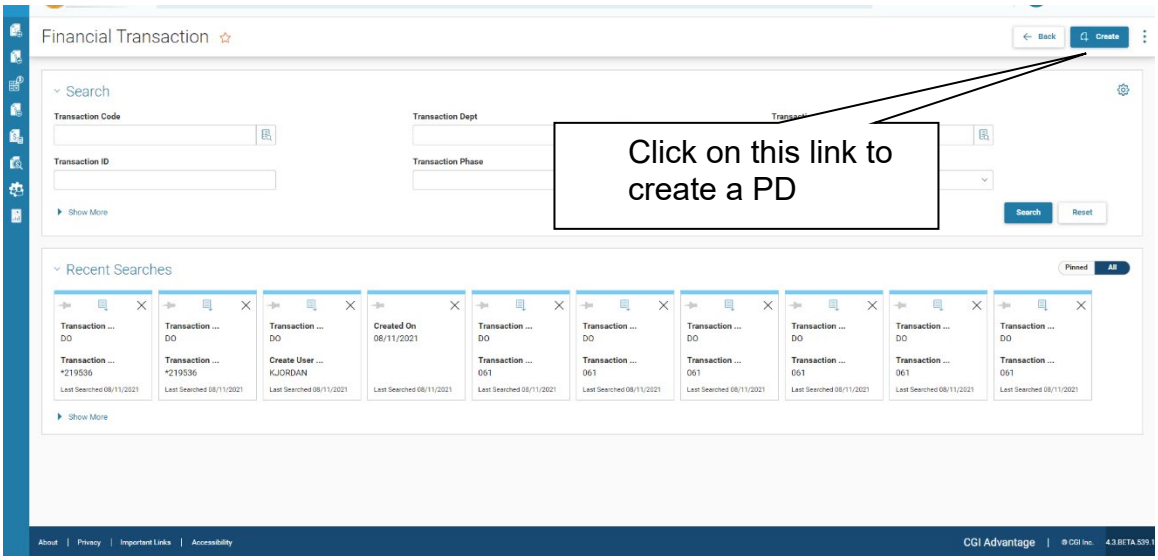
Departmental Purchase Order (PD)

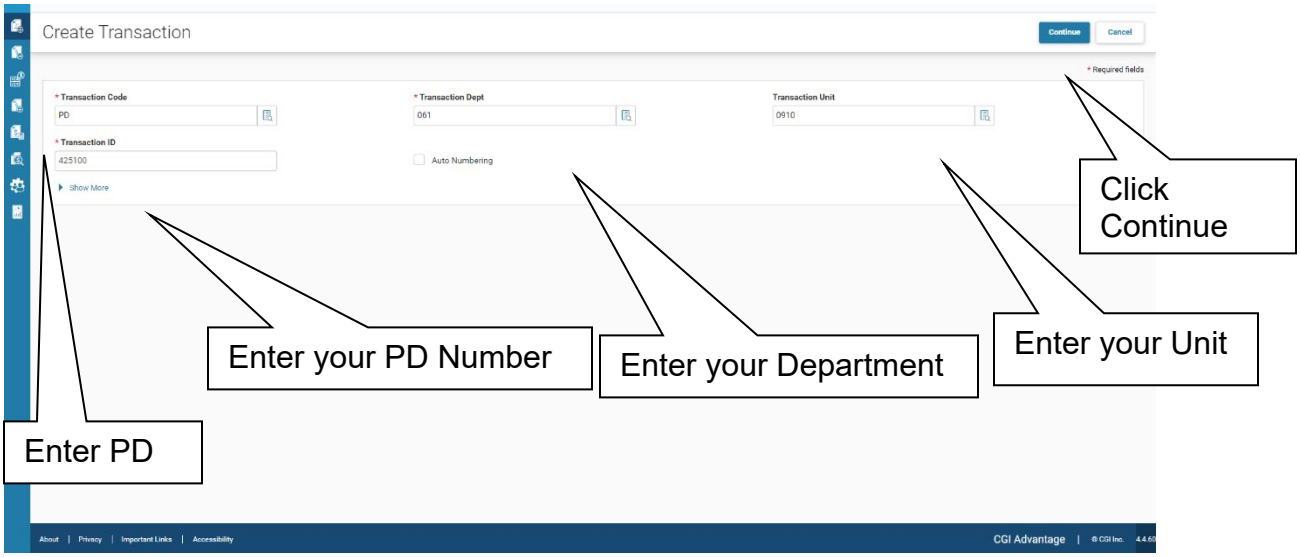
1. Click **Create and Search Financial Transactions.**



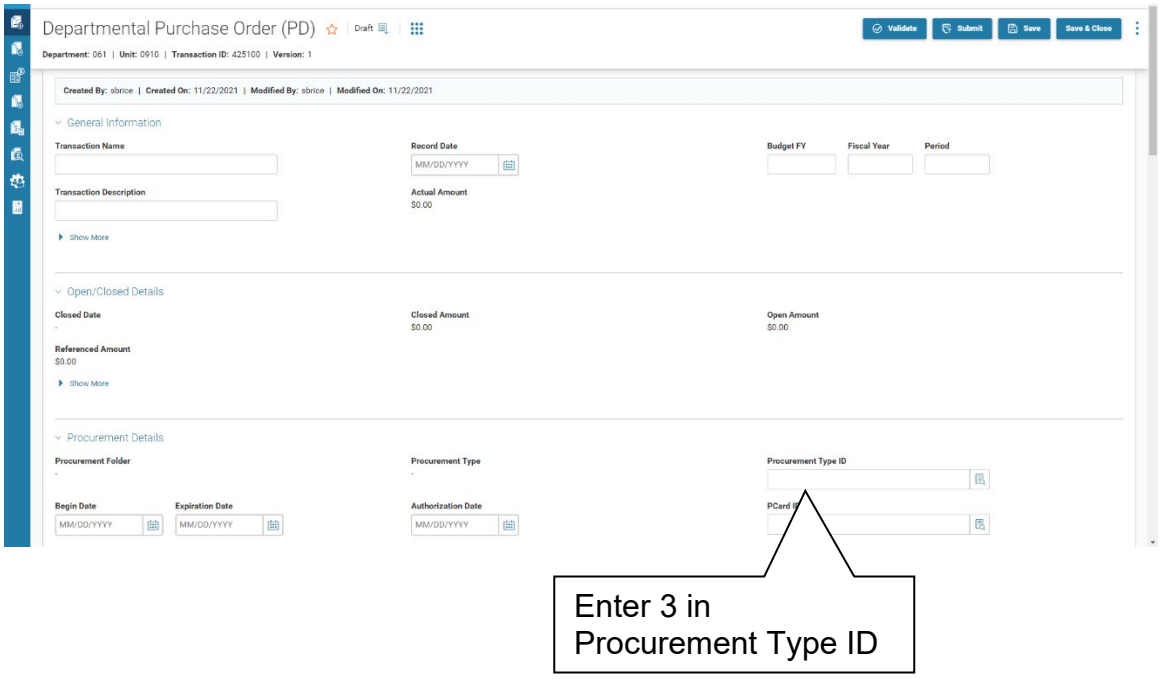
2. Click **Create**.



3. Enter **Transaction Code, Transaction Dept, Transaction Unit, and Transaction ID**.

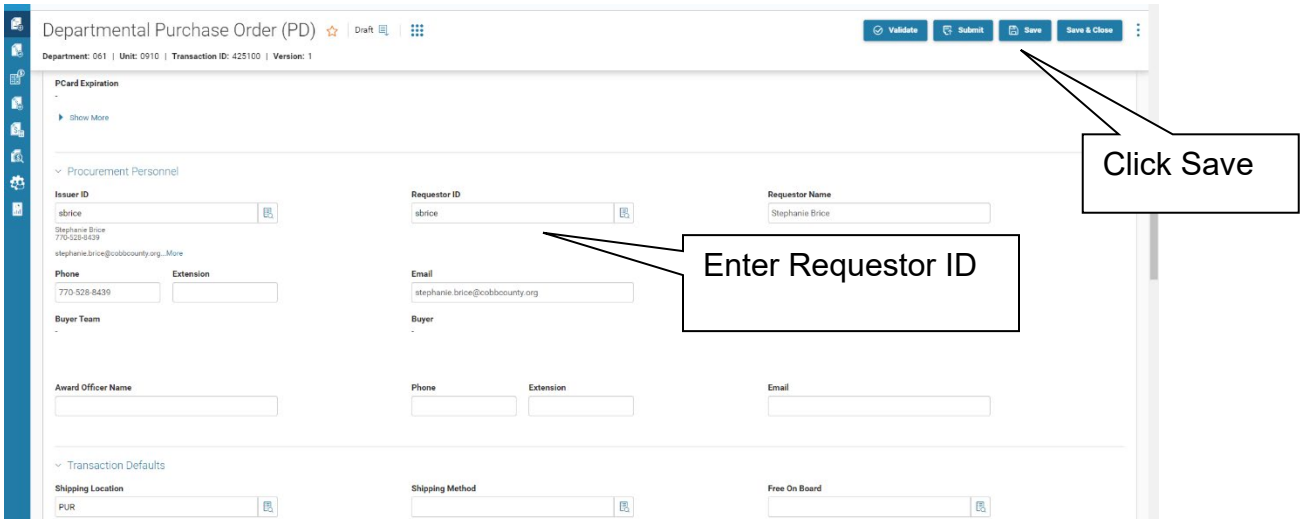


4. Scroll down to **Procurement Details** and enter 3 in **Procurement Type ID**.



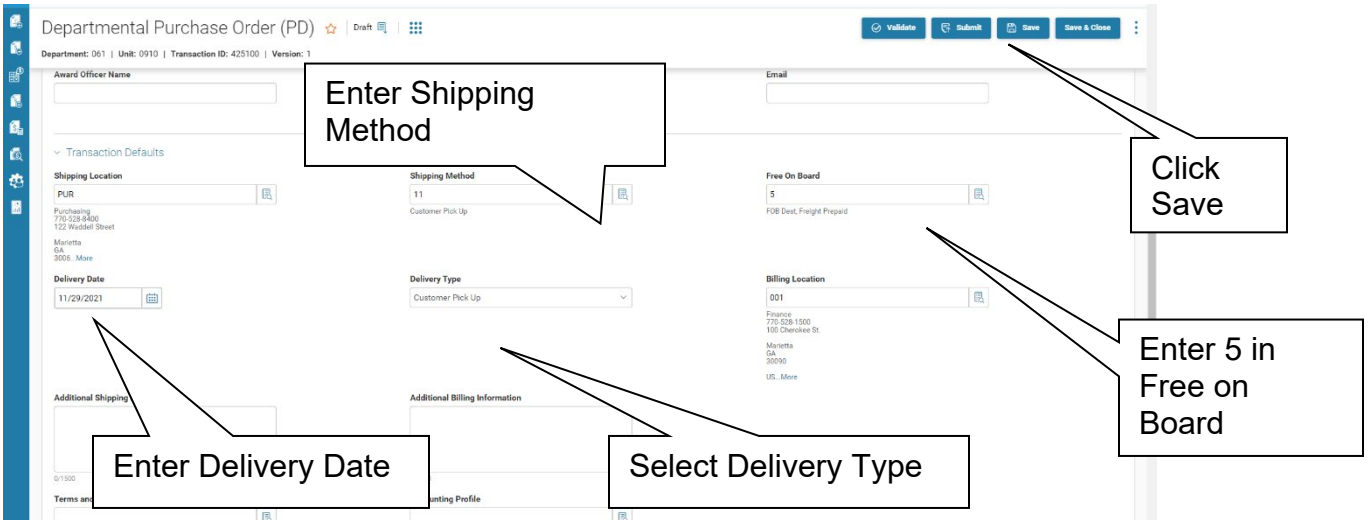
5. Scroll down to **Procurement Personnel** and enter **Requestor ID** using the pick list. Or, if the requestor is not on the pick list, enter **Name, Phone Number and Email (optional)**. A name and phone number are required whether populated from the pick list or entered manually.

6. Click **Save**. The contact information will populate after you click Save.

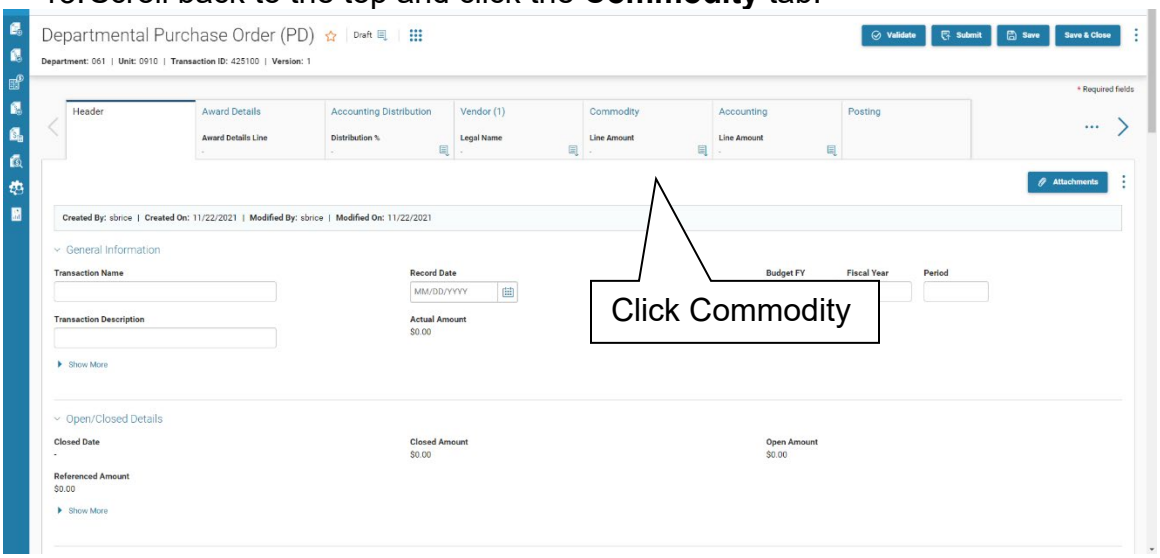


7. Scroll down to **Transaction Defaults.**
   The Shipping and Billing Locations will default from your User ID.
   Verify that your shipping location is correct; use the pick list to change the shipping location, if necessary.
8. Enter **Shipping Method** or select one using the pick list.
9. Enter 5 in **Free on Board**.
10. Enter **Delivery Date** or click on the calendar to specify date.
11. Select **Delivery Type**.
12. Click **Save**.

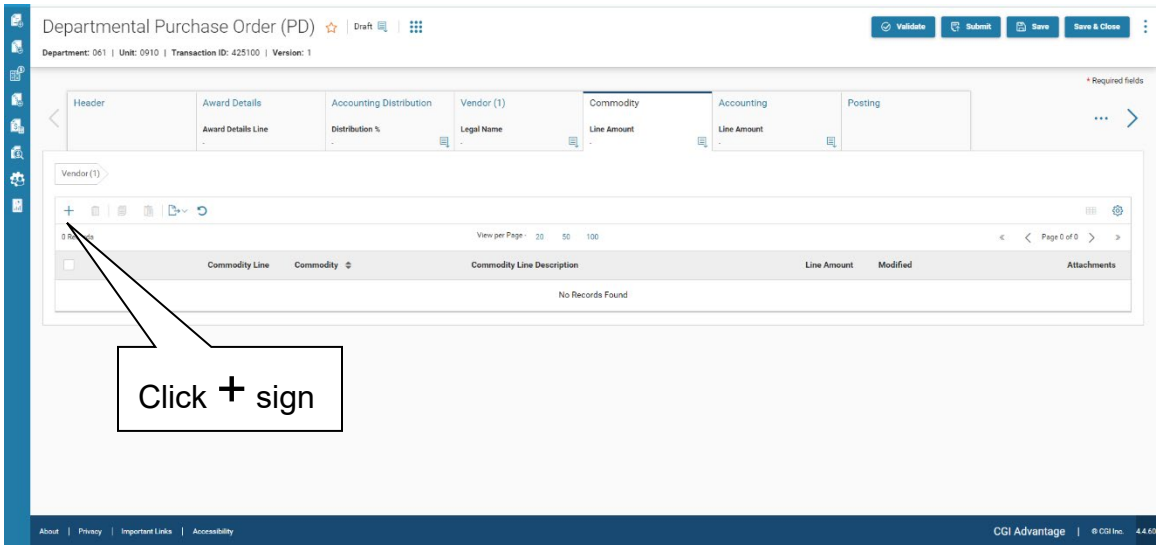
Note: The Shipping Method will generally be Customer Pickup (11) and the Delivery Type will generally be Customer Pickup as well.



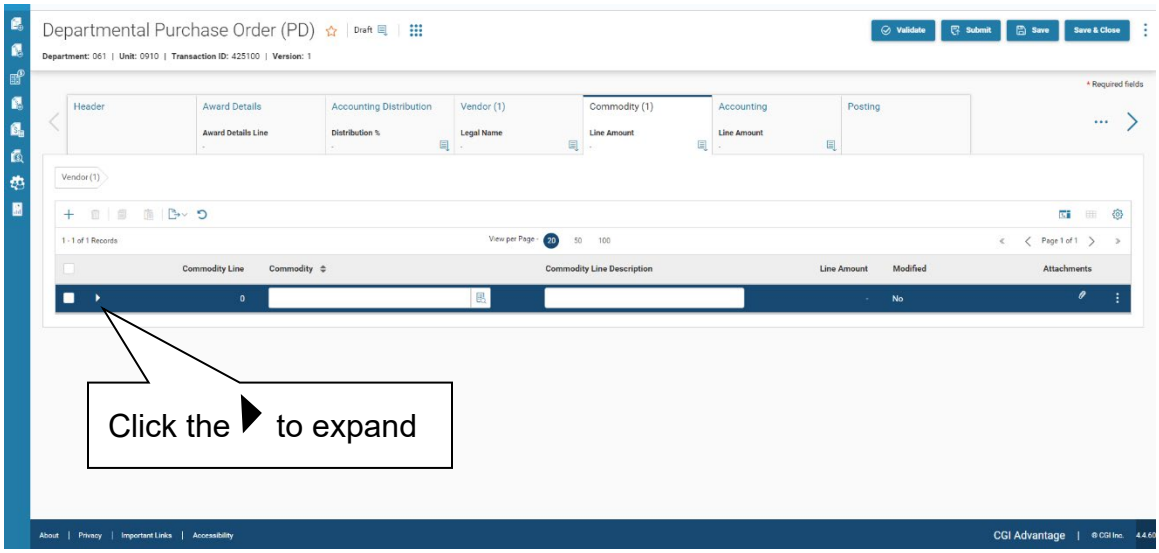
13. Scroll back to the top and click the **Commodity** tab.



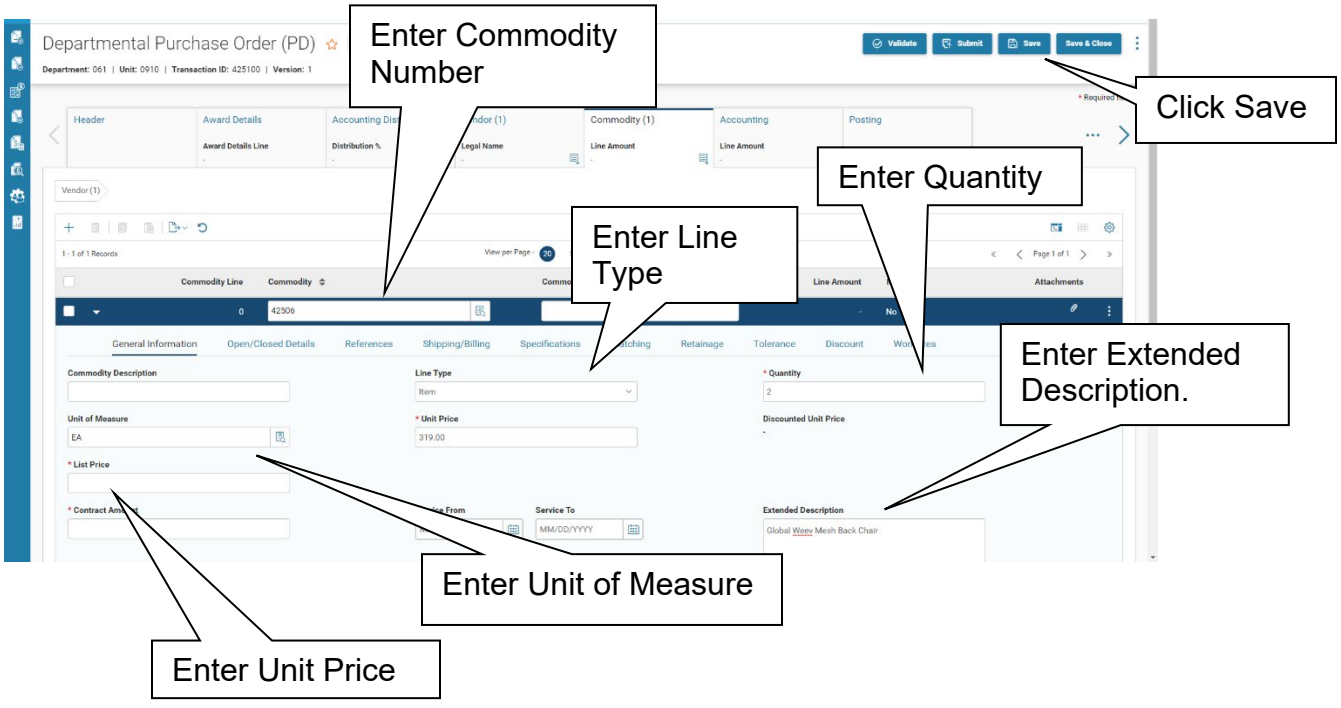
14. Click the **+** sign to add a new line.



15. Click the ▶ to expand the section.



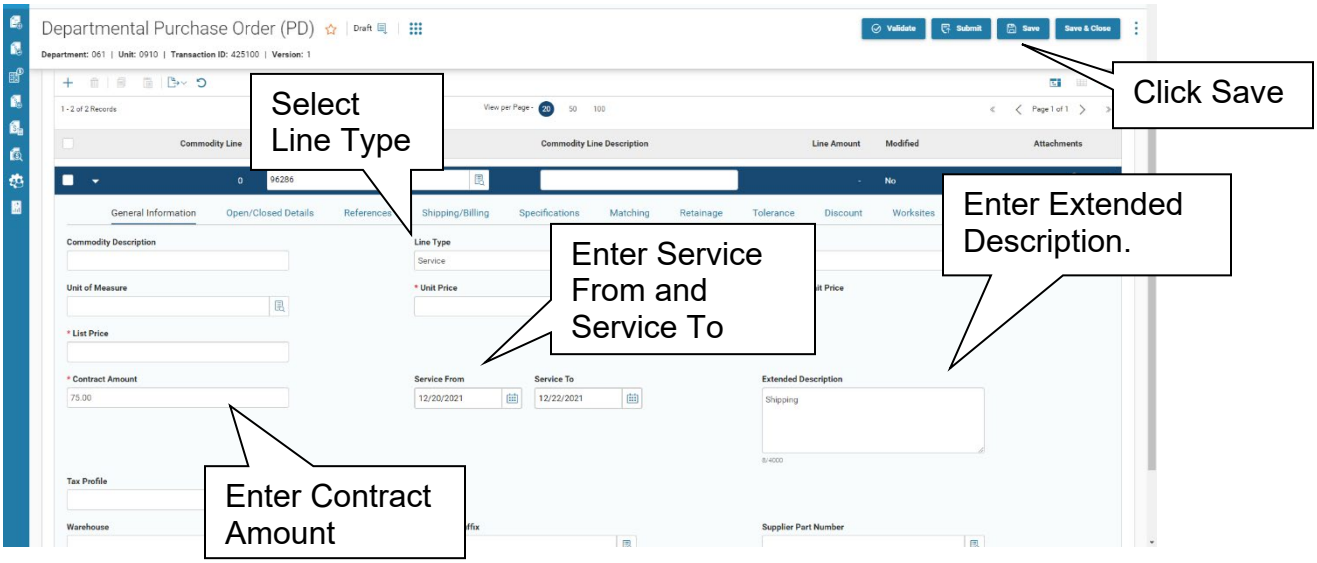
16. Enter **Commodity** number or select one using the pick list.
17. Select **Line Type** (**Item** or **Service**).
    For Line Type **Service,** see separate instructions below.
18. Enter **Quantity**.
19. Enter **Unit of Measure**.
    If you are unsure of the abbreviation, select one using the pick list.
20. Enter **Unit Price**.
21. Enter **Extended Description**.
22. Click **Save**.



For Line Type **Service**, follow these steps instead of steps 18-23:

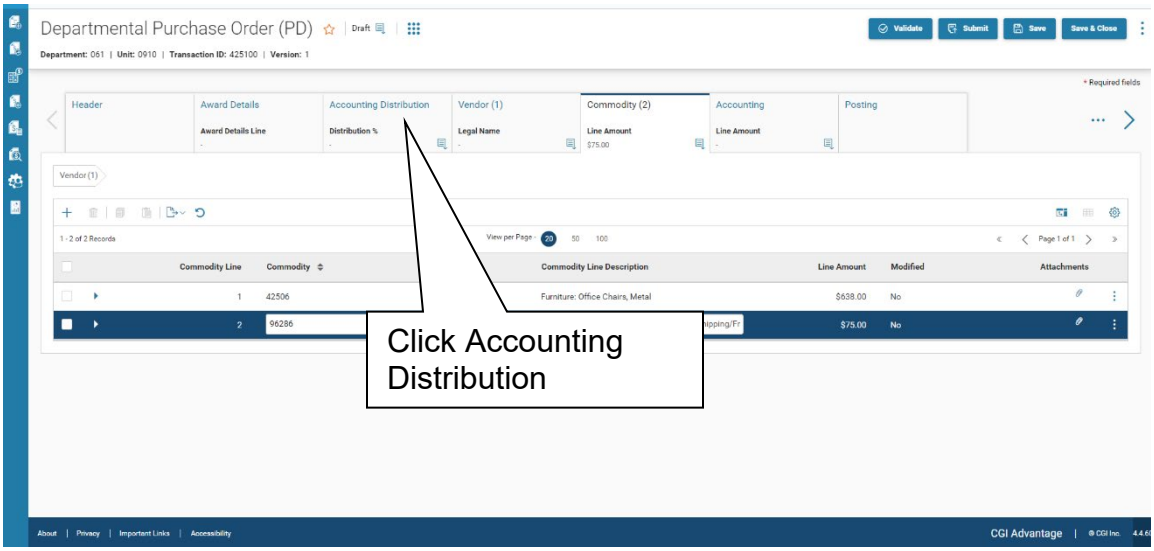
a. Select Line Type **Service**.
b. Enter **Contract Amount**.
c. Enter **Service From** and **Service To** dates.
d. Enter **Extended Description**.
e. Click **Save**.

Note: Shipping or freight charges are considered a service.

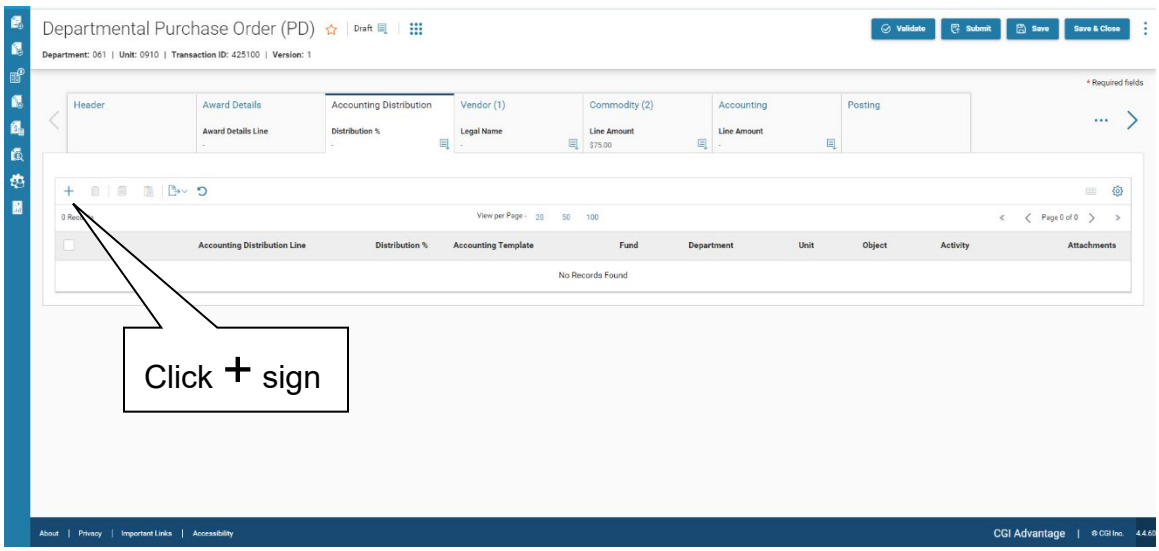


Repeat steps 15-23 for each additional commodity you are requesting.

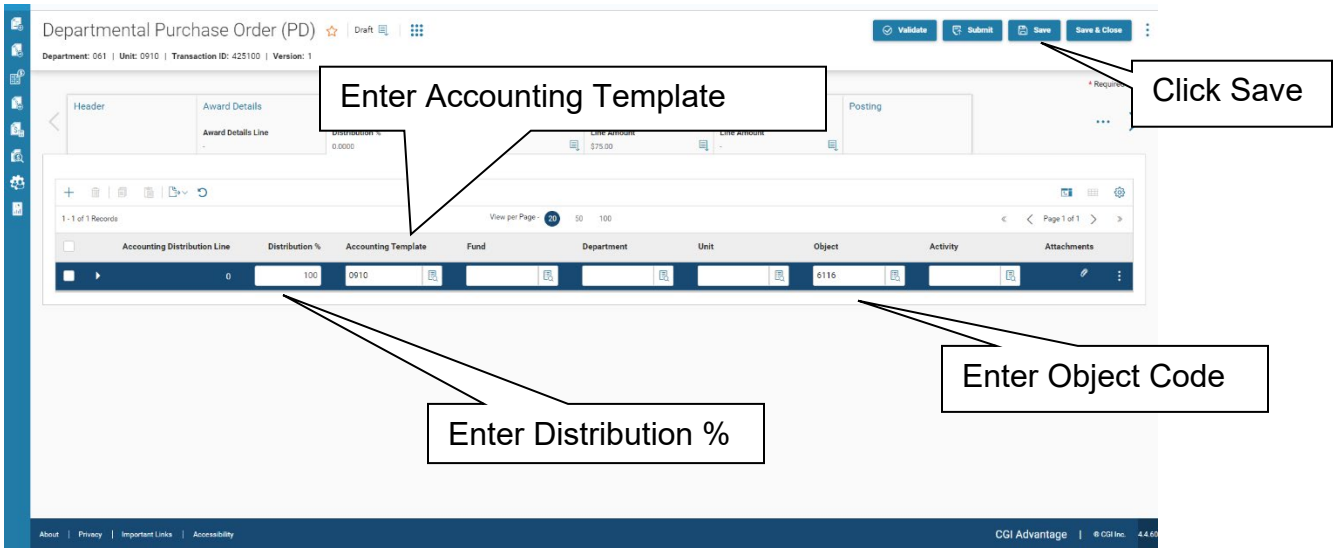
24. Scroll back to the top and click the **Accounting Distribution** tab.



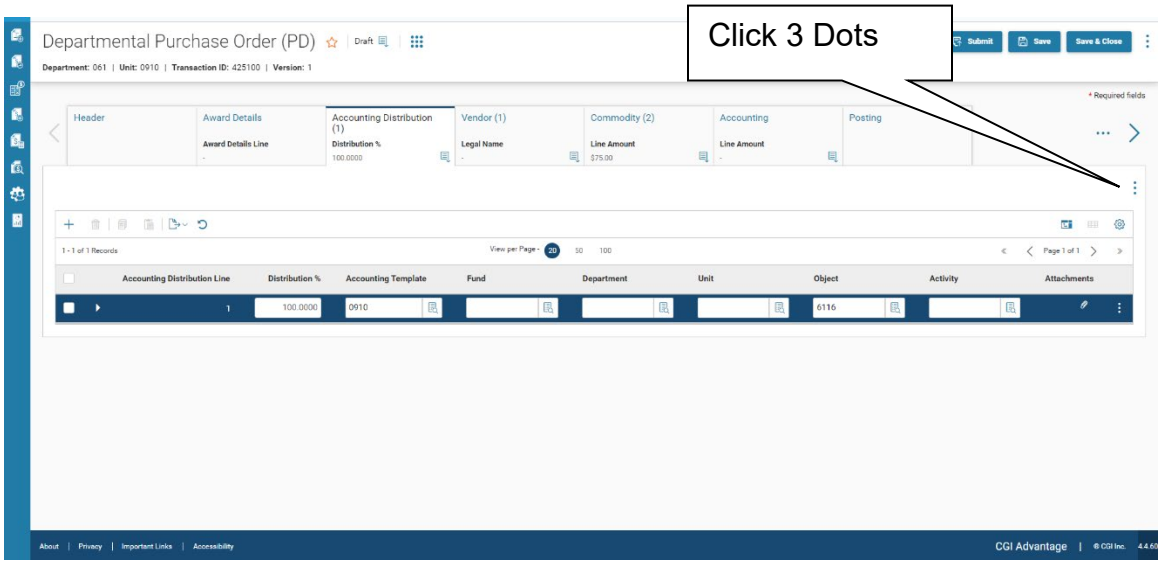
25. Click the + sign to add a new line.



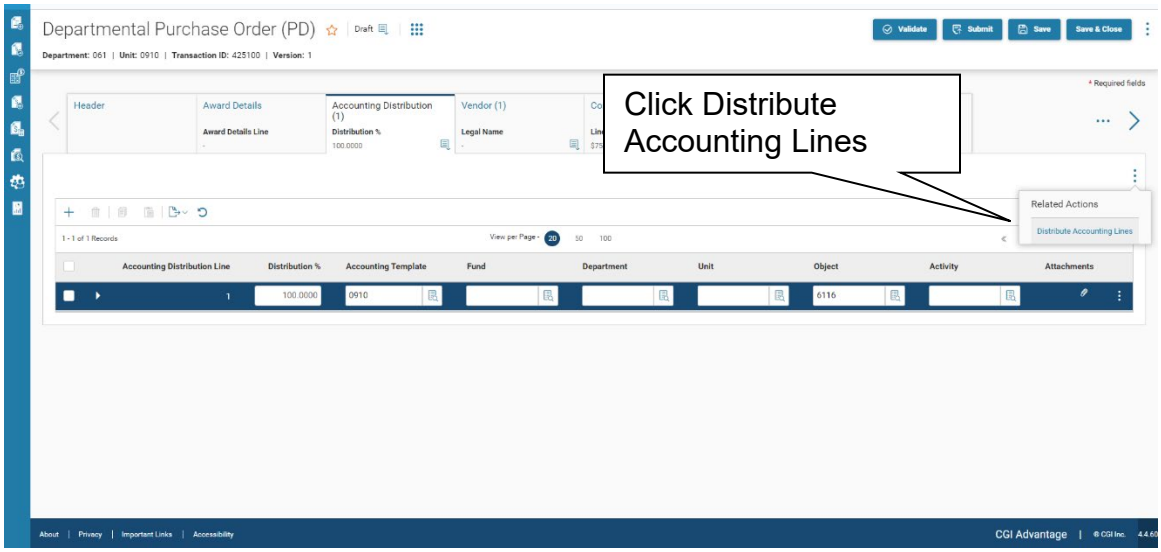
26. Enter **Accounting Template** (sub-unit).
27. Enter **Distribution %** (100).
28. Enter **Object Code** (if all commodities are being charged to one object code). If multiple object codes are being used, see separate instructions below.
29. Click **Save**.



30. Click **3 Dots (Related Actions)**.

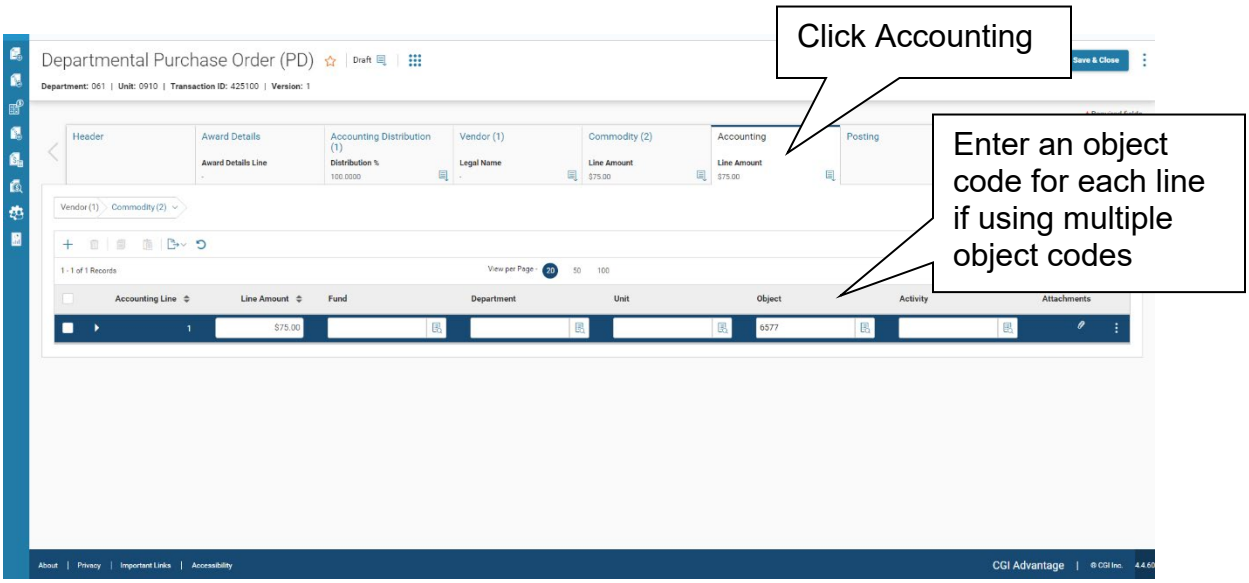


31. Click **Distribute Accounting Lines**.

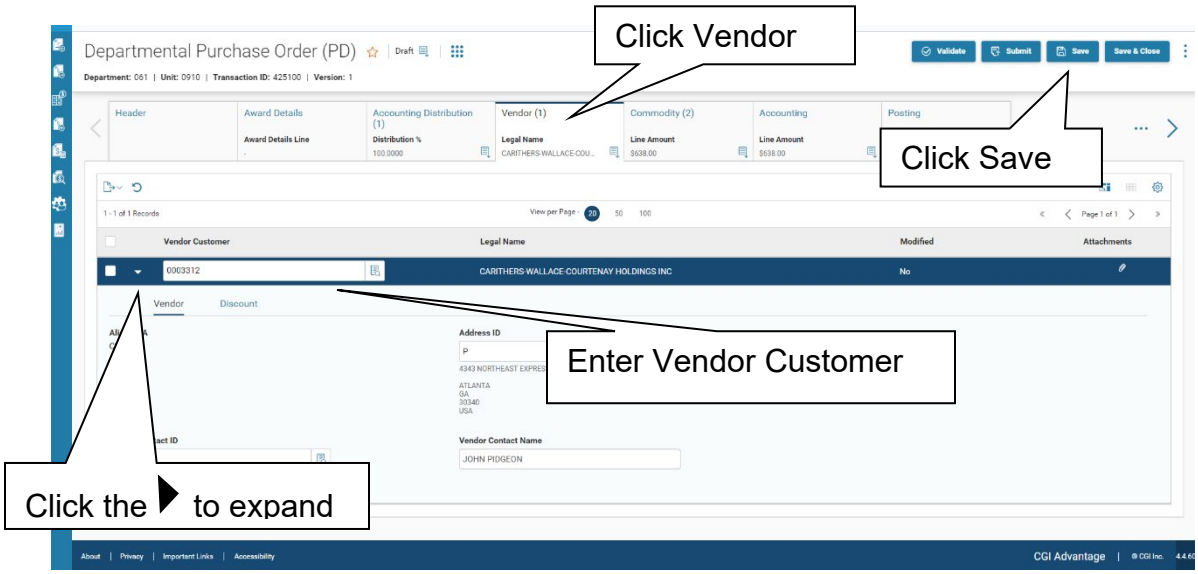


This will create an accounting line for each commodity entered.

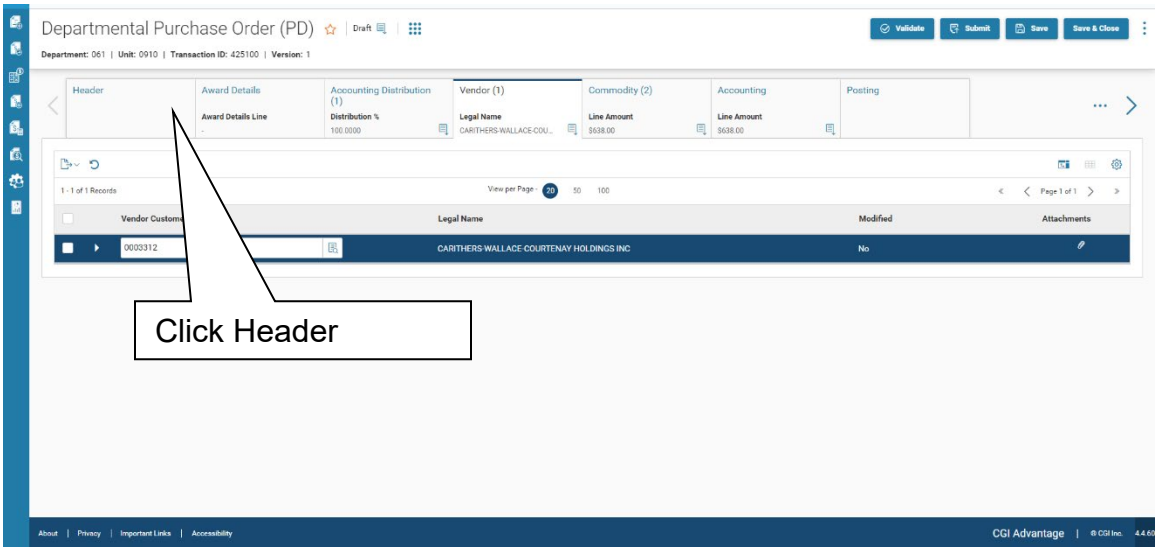
If you are charging commodity lines to different object codes, click **Accounting** and enter an **Object Code** for each line.



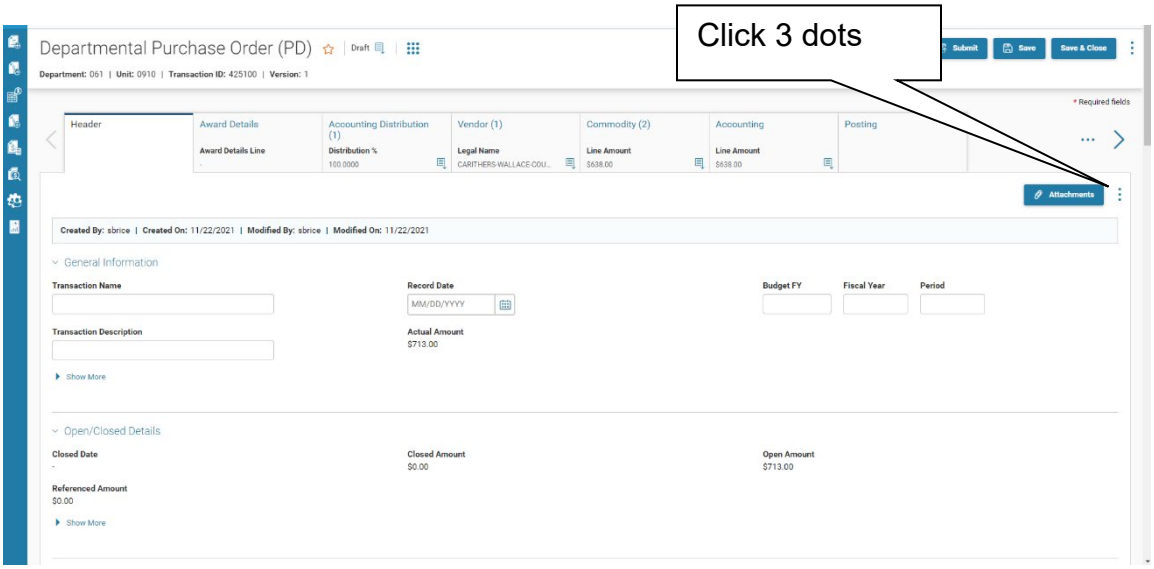
32. Click the **Vendor** tab.
33. Enter the vendor number (**Vendor Customer)** or select one using the pick list.
34. Click **Save**. The vendor information will populate after you click save.
35. Click the ▶ to expand the section, if you would like to view the vendor's information.



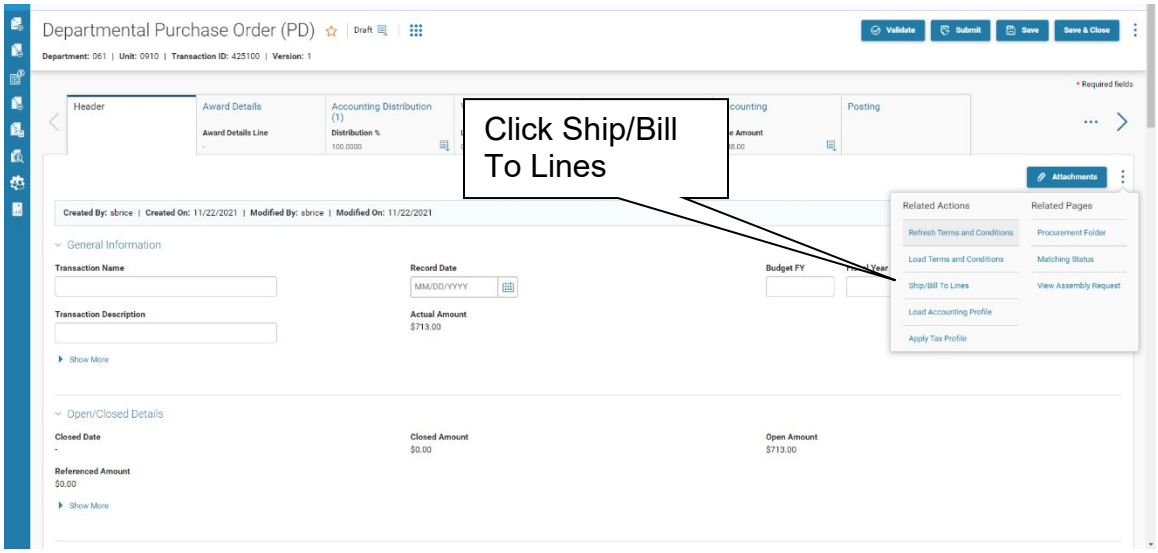
36. Click the **Header** tab.



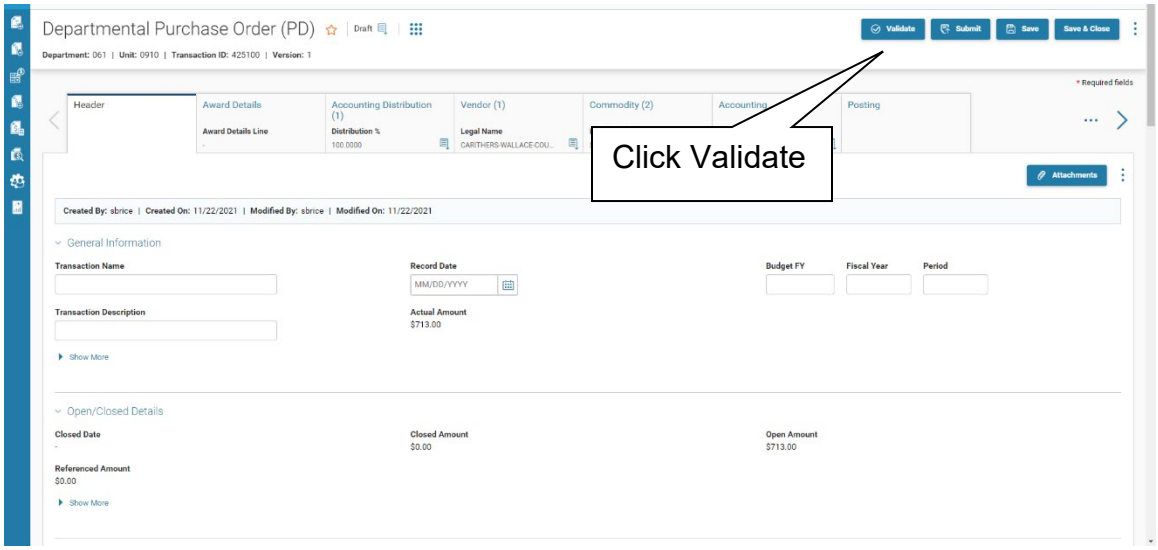
37. Click **3 Dots (Related Actions)**.



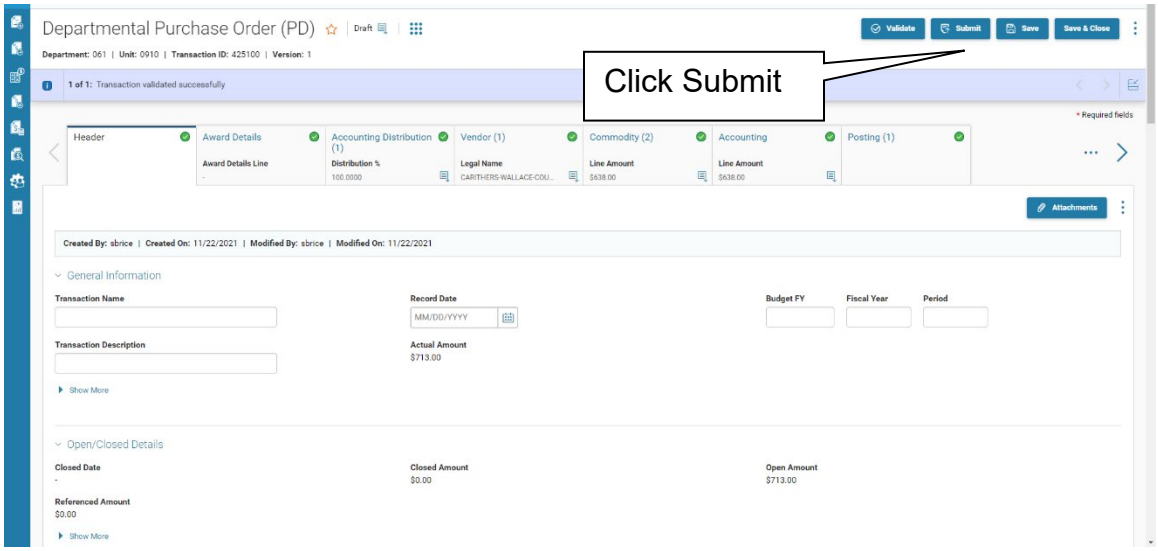
38. Click **Ship/Bill To Lines**.



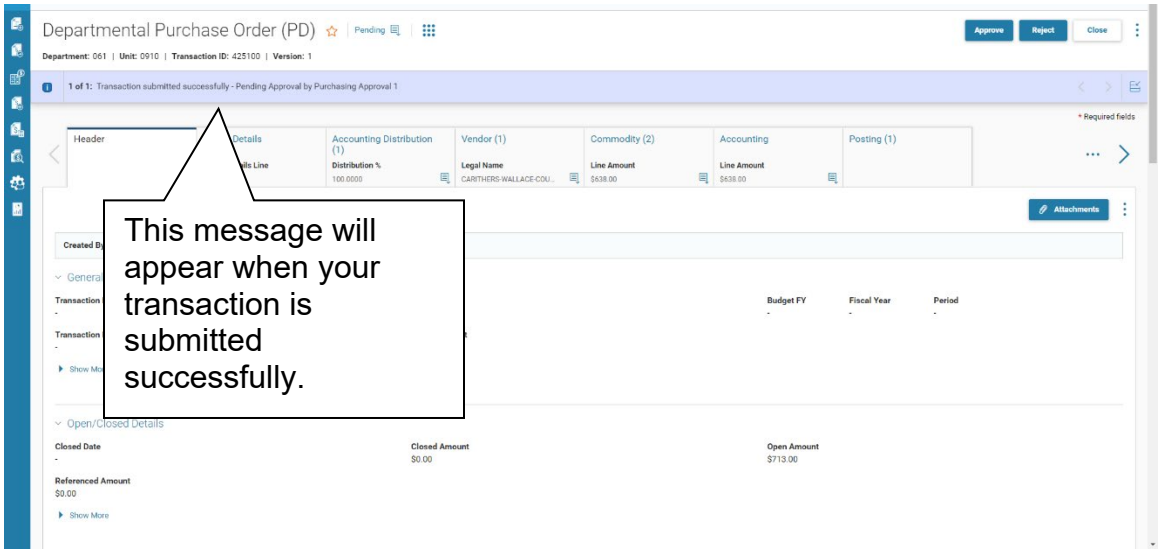
39. Click **Validate**.



40. Once the transaction validates successfully, click **Submit**.



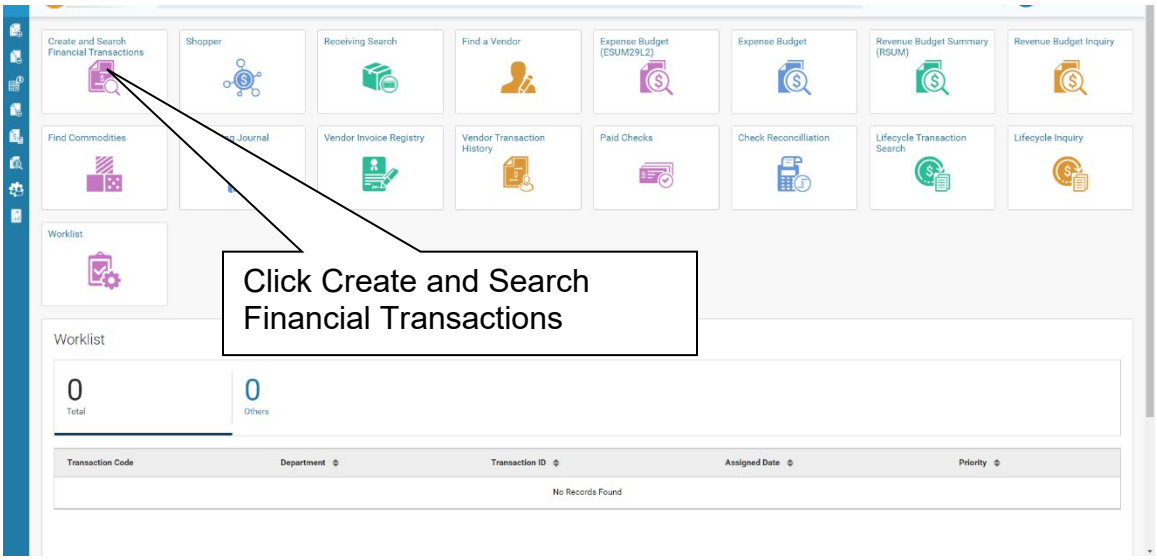
This message will appear when your transaction is submitted successfully.



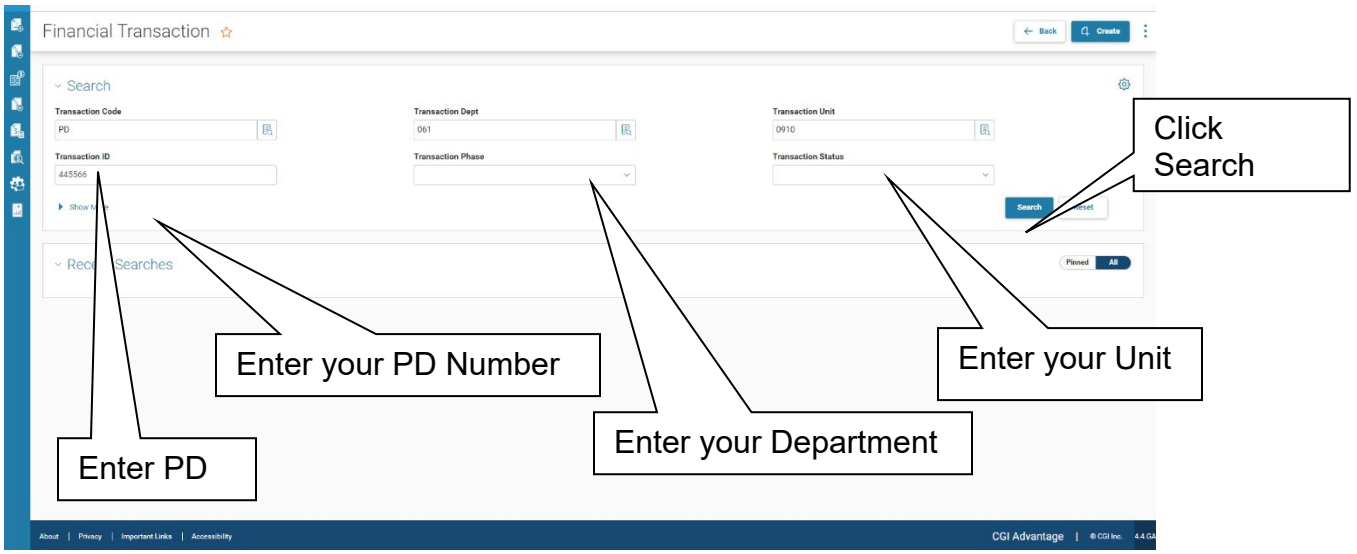
Departmental Purchase Order (PD) Cancellation

A PD may only be canceled if there are no transactions that reference it. If there is a Receiver (RC) or an Invoice (IN) in Advantage Financial that references the PD, those transactions must be canceled before the PD can be canceled. If payment has been made against a PD, the PD cannot be canceled.

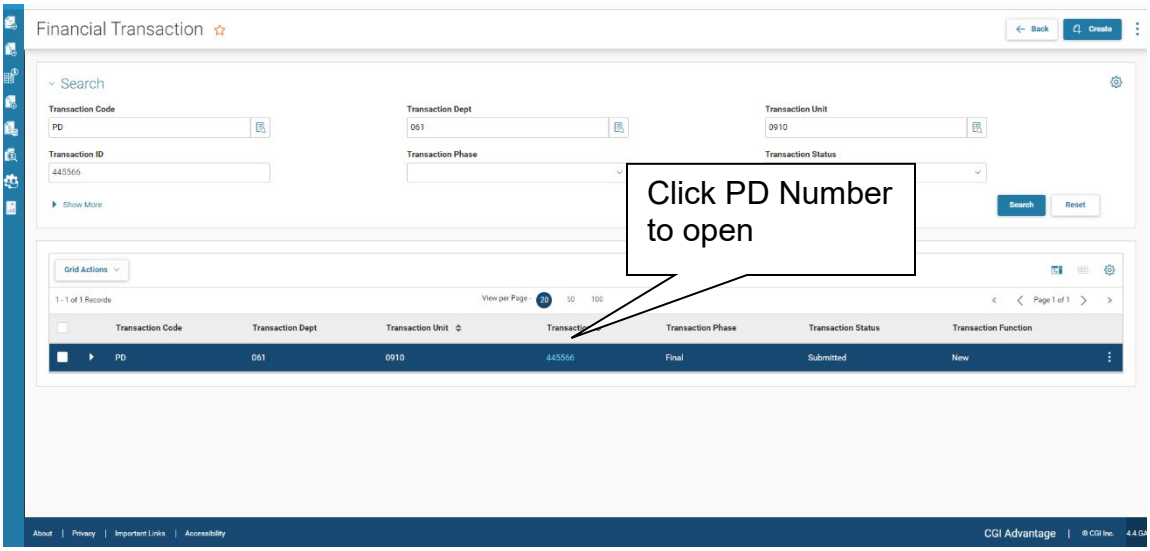
1. Click **Create and Search Financial Transactions.**



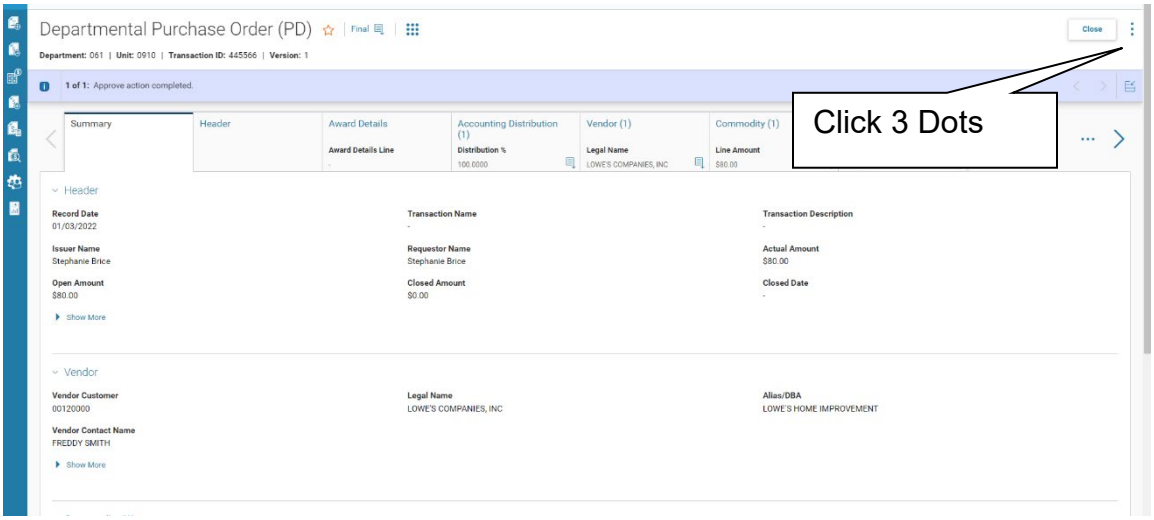
2. Enter **Transaction Code, Transaction Dept, Transaction Unit, and Transaction ID**. Click **Search**.



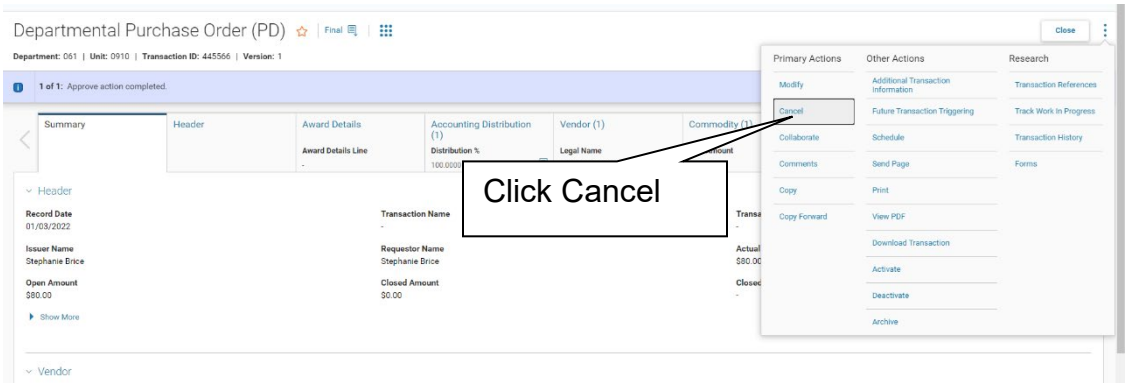
3. Click on the highlighted PD number to open the transaction.



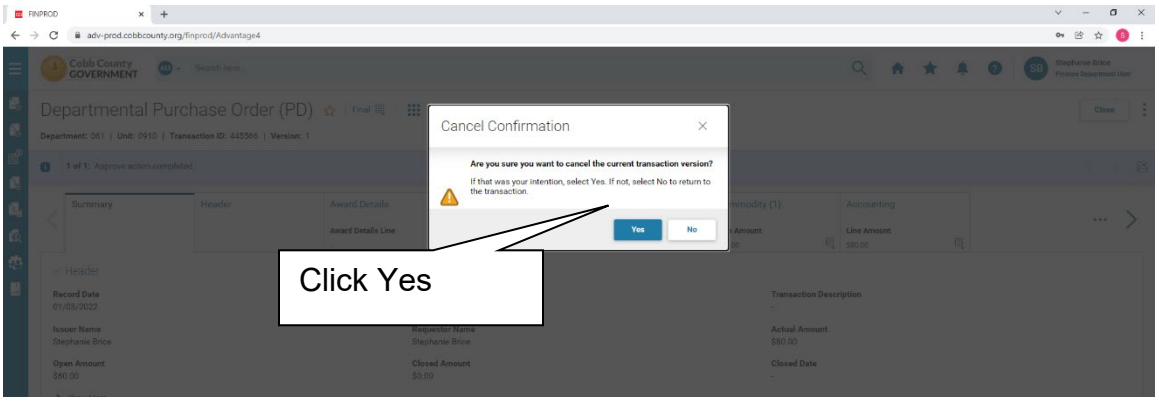
4. Click **3 Dots (Related Actions)**.



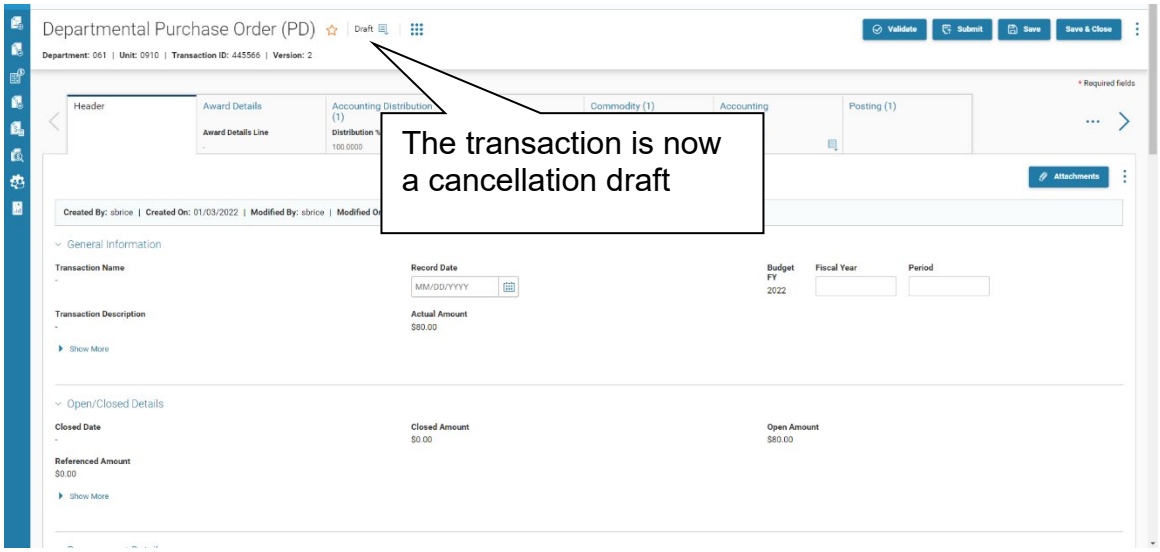
5. Click **Cancel.**



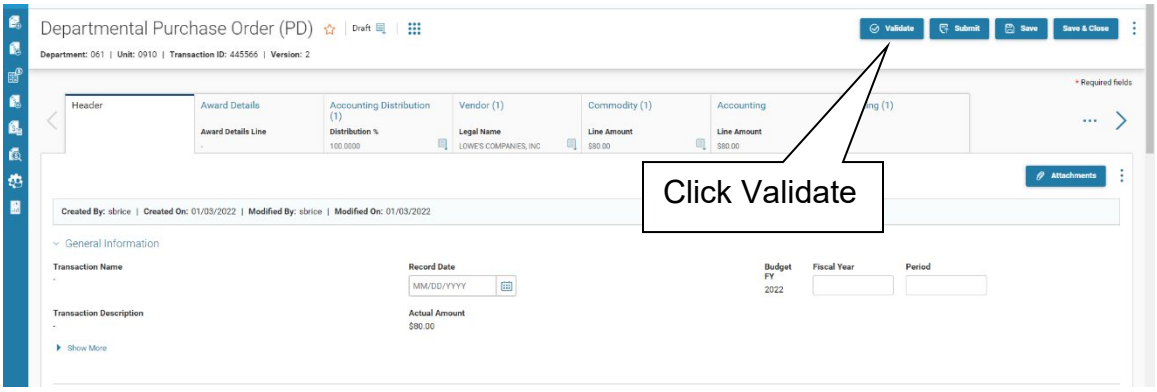
6. Click **Yes**.



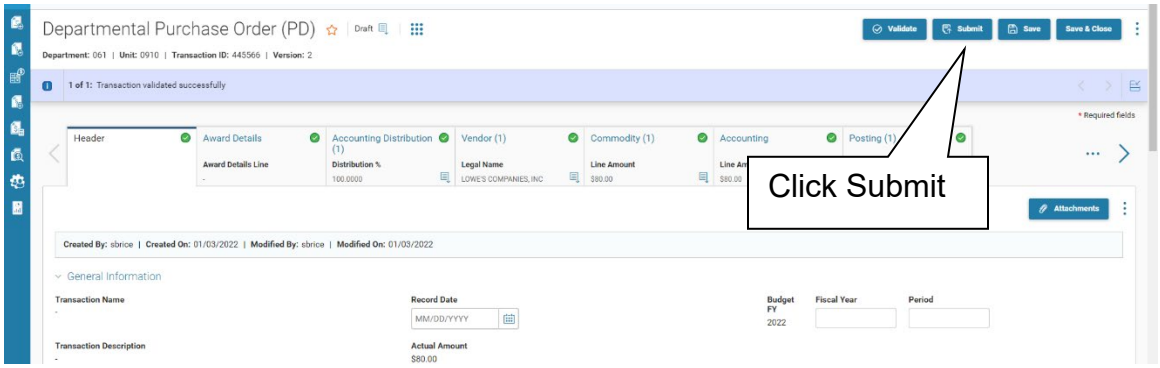
A cancellation draft will appear.

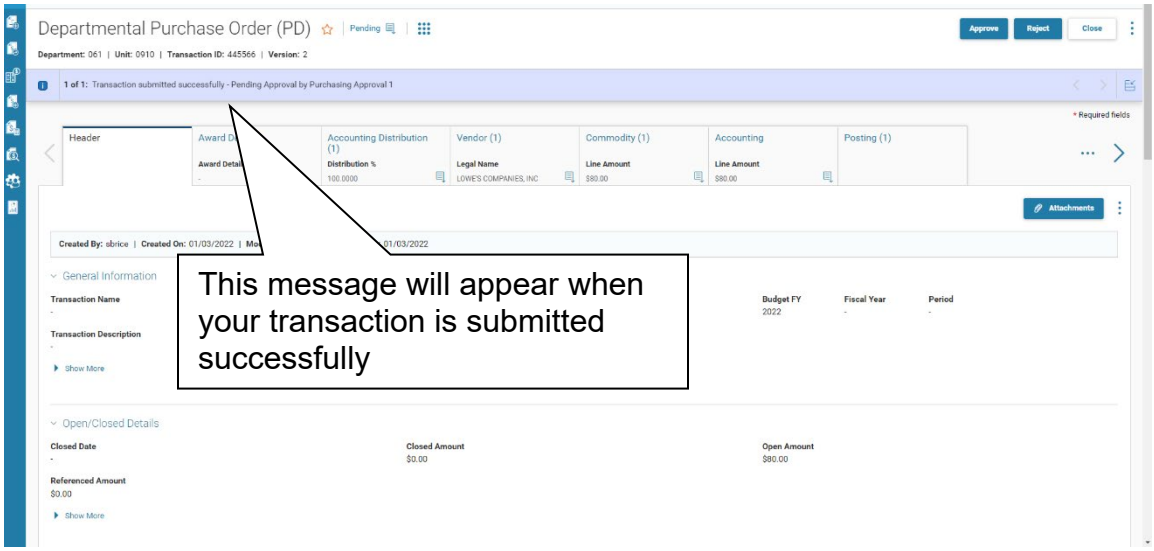


7. Click **Validate**.



8. When the transaction validates successfully, click **Submit**.





The cancellation will then be routed through the same approvals as the original. Entries will not be reversed until the cancellation is in Final Phase.