

# Creating a PO—Best Practices

## ◆ Product Description (PO Line)—Best Practice

- Create a PO line for:
  - **Product Description** including product, service expectation, dates of service, etc.
    - Ensure Unit of measure and quantity are entered at each PO line.
  - **Shipping / Freight** —add per quote or negotiated amount with the supplier is best. If not add an estimated amount based on Fed-Ex / UPS estimate
  - **Handling** — add per quote or negotiated amount with the supplier
  - **Service and all other fees** — add per quote or negotiated amount with the supplier



Using the Purchase Request Quick Order is the fastest way to create PO lines.

[Purchase Request Quick Order](#)

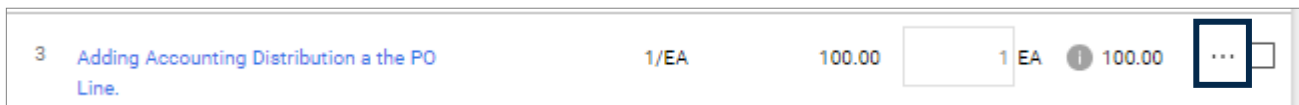
## ◆ Accounting Distribution at the Header vs at the PO Line:

### ◆ Accounting Distribution at the **Header**



- Add the Accounting Distribution at the **Header** level when:
  - There is 1 Accounting Distribution — aka Chartfield String / funding source
  - The split is 50% / %50 for the Accounting Distribution — aka Chartfield String / funding source
  - The split is 33% / 33% / %34 for the Accounting Distribution — aka Chartfield String / funding source

### ◆ Accounting Distribution at the **Product Description / PO Line Level**



[Accounting Distribution](#)

- Add the Accounting Distribution at the **PO Line** level when:
  - For all other types of splits by percentage with the Accounting Distribution — aka Chartfield String / funding source
  - Any split by **exact dollars** with the Accounting Distribution — aka Chartfield String / funding source



After the first Chartfield has been saved at the PO Line level the feature to copy to other lines will appear

[Values have been overridden for this line](#)

## Creating a PO—Best Practices

### ◆ Links to Additional Helps/ Training Guides:

- [Shopper Training](#) - How to Shop
  - [Shopping ONE SHEET](#)
  - [Shopping CHECK LIST](#)
  - [Proceed to Checkout](#)
    - [Accounting Distribution Best Practice](#) — Displays Peoplesoft behavior. Learning example vs Best Practice
- [Requisitioner Training](#) — Everything which occurs after shopping
- [Approver Training/help](#)
- [Change Request](#) – When should they be done and how to create the change
- [One UShop](#) - help guide with tips/tricks