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.

♦ 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

• 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.
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◆ 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 Peopesoft 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