

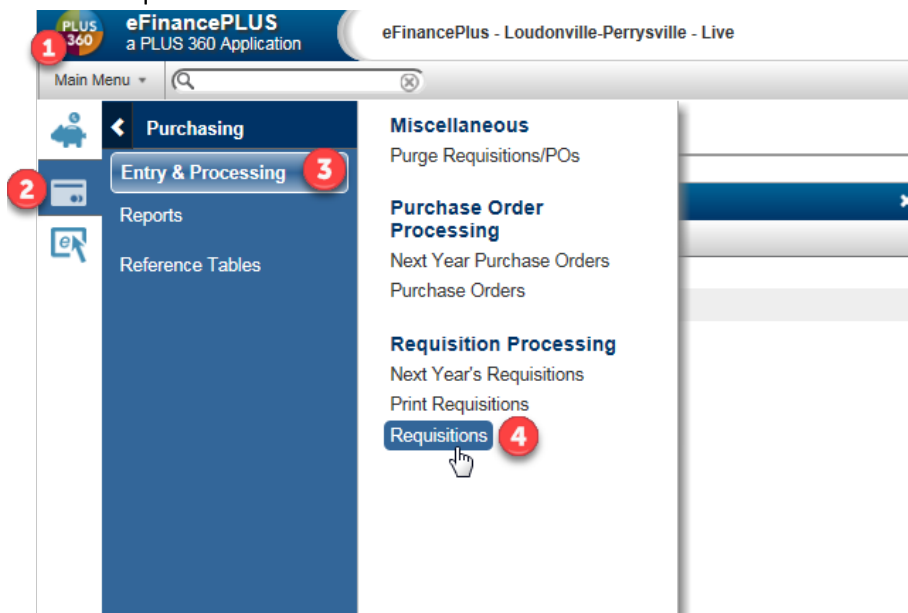
Figuring out a PO Number & Printing a Copy of a PO

Many times I need to complete an order by inputting the PO number on a vendor's website. Many vendors even want me to upload a copy of the PO. I have tried all sorts of ways and this is the simplest for me. As you get more comfortable with eFinance maybe you'll find another way. If so please share.

PART 1: What is the PO number assigned to a requisition?

(If you already know your PO# and just need to print a copy of it skip to PART 2)

- Go to the area of eFinance for requisitions.
 - Main menu
 - Purchasing
 - Entry & Processing
 - Requisitions



- You're going to want to bring up a list of your requisitions. In the Requisition field type your 2-letter department, the fiscal year and then the asterisk. Then hit Enter on your keyboard.

The screenshot shows the search criteria form in the eFinancePLUS application. The form is titled 'Search Criteria' and has a blue header. Below the header, there are several input fields: 'Year' (set to 2018), 'Requisition' (set to TE18*), 'Buyer', 'Date Requested', 'Date Required', 'Recommended Vendor', 'APPROVAL GROUP', 'Attention', and 'Status'. A red arrow points to the 'Requisition' field. Below the input fields, there are 'Find' and 'Advanced' buttons. At the top of the form, there are tabs for 'Copy', 'Print Requisitions', 'Budget Transfers', 'Budget Adjustments', and 'Set I'. Below the form, there is a table with columns: 'Requisition', 'Date', 'Fiscal Year', 'Vendor #', and 'Vendor Name'.

- You be presented with a list of all your requisitions from your department and the fiscal year you specified. Find the requisition you're interested in and double click on the requisition number.

TE180054	07/18/2017	2018	000817	LENOVO	LESLIE KAMENIK	TECH	250.00
TE180055	07/18/2017	2018	000817	GOVCONNECTION	LESLIE KAMENIK	TECH	439.21

- The requisition will open. Look in the Status field. You'll find the PO#. If you need to print the PO write down the number. You'll need it in the next step.

Requisition * Continuous

APPROVAL GROUP *

Requested

Required

Vendor

Vendor Address
LENOVO
P.O. BOX 643055
PITTSBURGH PA 15264

Freight

Comments

Buyer

Attention

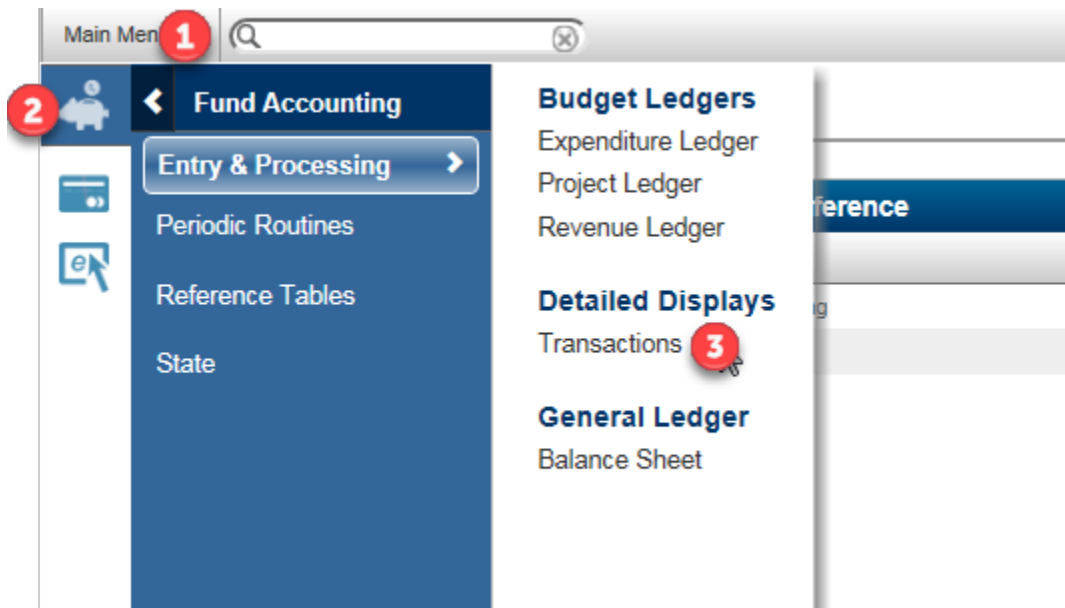
Ship To *
421 CAMPUS AVE
LOUDONVILLE, OH 44842

Item	Description	Quantity	Price	Total	BUDGET UNIT	Account	Status
1	ANNUAL FEE- NORTH AMERICAN AUTHC	1.00	250.0000	250.00	1111000000071000	510	PO-18000422

PART 2: Printing a PO

You've written down the PO number. The one in my example above is 18000422. Get back to the main page of eFinance.

- Main Menu
- Fund Accounting
- Transactions



- Another window will open, click on the Encumbrance/Invoice tab. In the purchase order field type in the PO number.

General Charge/Check **Encumbrance/Invoice**

Encumbrance/Invoice Data

Due Date 1099 Indicator

PURCHASE ORDER 18000422 Discount Date

Invoice/Receipt Discount Amount

Item Number

Partial/Final

- Look at the menu bar at the top. The View Attachments icon is depressed and colored orange. Click on it.

Date: 07/19/2017 Period: 1/18

General Charge/Check **Encumbrance/Invoice**

Encumbrance/Invoice Data

Due Date 1099 Indicator

PURCHASE ORDER 18000422 Discount Date

Invoice/Receipt Discount Amount

Item Number

Partial/Final

Date	TC	Year	Period	BUDGET UNIT	Account
07/18/2017	17	18	1	1111000000071000	510

- Double click on the field that says PO.

Attachment Information

Transaction Number

Add Attachment

Attachment Group *

File Name *

Title *

Attachment Group	Title
PO	Purchase Order

- Finally your PO will open up. You can save it and/or print it.

Loudonville-Perrysville
Board of Education
210 East Main Street
Loudonville, Ohio 44842
Phone: 419/994-3562 Fax: 419/994-2307

PURCHASE ORDER NO. 18000422

PAGE NO. 1

PO no. must appear on packages & invoice
Shipments must be sent freight prepaid.

VENDOR: 001253 FAX: 585-512-1788
LENOVO
P.O. BOX 643055
PITTSBURGH PA 15264

SHIP TO: LOUDONVILLE HIGH SCHOOL
421 CAMPUS AVE
LOUDONVILLE, OH 44842
ATTN: LESLIE KAMENIK
lopr_treas@tccsa.net

ORDER DATE: 07/18/17	BUYER: LESLIE KAMENIK	REQ. NO.: TE180054	REQ. DATE:
TERMS: NET 30 DAYS	F.O.B.:	DESC.: SELF-MAINTAINER RENEWAL	