## Create a purchase order as a Buyer

All non-catalogue requisitions raised in iProcurement will be sent to a nominated Buyer at the Preparer's Business Centre. The Buyer reviews and acts on all requisition demands either by creating a purchase order to be sent to the relevant supplier or by rejecting the requisition returning it to the Preparer for action.

**Note:** the Buyer would return a requisition if, the items are available from the catalogue, the nominated supplier is not a preferred supplier, if the requisition details are incomplete, or where the Buyer is authorised to make the purchase using a University credit card (in accordance with University purchasing policy). If returned, a workflow notification that the requisition has been returned along with the Buyer’s reason for rejecting it will be sent back to the Preparer. Returning Non-Catalogue Requisitions is covered in more detail by the *Returning a Non-Catalogue Requisition* reference card.

This reference card covers the steps required to create a purchase order.

### Creating a purchase order

1. Log into Themis, click on responsibility **UOM BUYER DEPT XXXX** or **UOM BUYER DEPT FACXXXX**, navigate to **Buyer Work Centre** and select the **Requisitions** menu option.

   The *Requisitions: Demand Workbench* screen displays.

   ![Demand Workbench Screen](image)

2. Review and verify the requisition details.

   Under each column on the *Demand Workbench* you can view the;
   - **Requisition number**
   - **Quantity ordered**
   - **Unit of measure (each)**
   - **Price per unit**
   - **Currency**
   - **Source**, the Supplier entered against the requisition
   - **Deliver-To**, the Budget Unit where the item is to be delivered
   - **Description**, the item description entered by the Preparer
   - **Note to Buyer**, extra information entered by the Preparer to support the order.
   - **Requester**, the Preparers name
   - **Attachments**, if any supporting documents were attached a paperclip would appear under this column that is used to open the attachments.

   Click on the **linked requisition number** to open the requisition and check that the correct charge account has been entered against the requisition.
Having verified all the details and if you are satisfied that the requisition is valid continue with the steps below to create the order.

**Important**: if the supplier is new and does not have an account with the University, the supplier name link will be inactive. Before a purchase order can be created where the supplier is new, the Buyer must complete an on-line new supplier request to have Supplier Maintenance in Accounts Payable create the new Supplier record.

For the example below we can see that supplier ‘Sarah JANE’ is not an existing supplier as her name is not active. The Preparer has also indicated in the *Note to Buyer* field that the supplier is new and that they have attached the completed New Local Supplier Request Form. The attachment can be opened using the paperclip icon under the *Attachments* column.

The Buyer logs into either UOM Manager XXXX or UOM Data Entry XXXX responsibility, navigates to Supplier Maintenance > New Request, and uses the information in the New Local Supplier Request Form to complete the on-line new supplier request. The Buyer will be notified once the new Supplier account has been created and they can then go ahead and create the PO as outlined below.

3 Select the checkbox against the relevant requisition and click the *Add* button.

The selected requisition disappears from the Demand Workbench and now appears in the Document Builder on the right of the screen.

For our example, we selected the first requisition in the list for 2 conference tickets to be purchased from Monash University.

*Note:* you may combine requisitions with the same Supplier and Deliver-To budget unit number.

If combining more than one requisition, repeat steps 2 and 3 above to add another requisition to the document builder.
4 Click the **Create** button.

An incomplete purchase order is created, quoting the purchase order number at the top of the screen. Some of the information has defaulted from the requisition. The order has opened on the **Header** tab in the middle of the screen.

5 Enter **ACCOUNTS PAYABLE** into the **Bill-To Location** field.

You may type in the name or use the search icon to populate the field. **Note:** all invoices for payment are to be sent to Accounts Payable in Finance and Planning.

6 Enter the budget unit number where the items are to be delivered into **Header Default Ship-To Location**

**Note:** this is a mandatory field.

7 Enter delivery instructions to the Supplier in the Description field if required.

**Note:** this is a free text field. Comments written here will be printed on the Purchase Order to be sent to the supplier.

8 Select the **Lines** tab.

The **Lines** tab displays. Check the line details including the selected Category and update it if required.

9 Select the **Schedules** tab.

The **Schedules** tab displays. From here you can review the details for each requisition you added to the order and update the quantity ordered if necessary.
10. **Select the Distributions tab.**

The Distributions tab displays. Check that the correct account string has been entered into the PO Charge Account field and update it if necessary. **Important:** do not update the natural account segment as this was automatically updated by the system based on the Category entered when the requisition was raised. For example, if ‘NON CAT-CONSULTANT SERVICES’ was entered the 5514 Consultants Service Fess natural account would be populated, if ‘ASSETS-CAPITALISED’ was entered the 1691 Asset Clearing natural account would be populated.

![Reference Card](image)

11. **Click the Submit button to complete the order.**

The Requisitions: Demand Workbench screen will be returned with a confirmation message indicating that the PO has been sent for approval. Requisitions created as purchase orders will no longer appear in the Demand Workbench and the document builder will be empty. **Note:** you may view any purchase orders raised under the Orders tab.

![Reference Card](image)

12. **Repeat steps 2 to 11 above to create another purchase order for the next requisition.**