

UAFD Purchase Order System

User Manual

Enter New Purchase Order – This function is used to create a brand new purchase order.

- Open the database – the startup screen will appear. Select the option to create a new purchase order. A blank purchase order will appear.
- Continue by filling in your name, vendor name, ship to designation, designation, type, cost center, and any additional notes that you may want to save. This process can be done quickly by using the TAB key to switch between fields in descending order. If you know what the text will be for each drop down list field, type the first few letters, making sure that the item begins to auto-fill what you had in mind, then hit the tab key to populate the field and move to the next item.
- Next, select a line item from the list, begin typing to use auto-fill, or double click on the line item box to add a new one to the list. Fill in as much information as possible about the price and quantity received, as well as a designation for each line item.
- When you are finished entering line items, enter a freight charge, if applicable, and compute the total by pressing the Compute Total button.
- Then print an issuer's purchase order and/or office purchase order by pressing the respective buttons at the top of the purchase order. This will send the paper purchase order directly to the printer.
- If you decide that you do not wish to save the purchase order that you began, you can VOID the purchase order by checking the VOID check box in the lower left hand corner of the purchase order screen. Keep in mind, this cannot be undone and a confirmation box will appear to make sure that you really want to VOID the purchase order. Click Yes to continue, or No to cancel the VOID operation.
- Click the Close button on the upper right hand side of the toolbar when you are finished. This will close the purchase order and return to the startup screen.

Browse Purchase Orders – This function is used to browse purchase orders, edit existing purchase order, or reprint paper copies of an existing purchase order.

- If you have already issued a purchase order and you have received an invoice, you can either scroll through the existing purchase orders using the arrow keys or enter the purchase order number in the GoTo box.
- All the controls will be deactivated by default so that accidental changes are avoided. Click the EDIT THIS PO button to activate the controls and make changes.
- If you have received an invoice, changes the status of the purchase order to Invoice Received and enter the invoice number. By reselecting the same status, you can change the existing number if you made a mistake.
- Make sure that if you make changes to the line item quantities or prices that you recomputed the total before you exit.
- In this screen, you can also reprint any purchase order or VOID a purchase order.
- Click the Close button exit.

Print Reports – This function will print various reports listed in the menu.

- From the startup screen, click Print Reports to access the list of available reports. Select one to begin printing to the default printer.

Tools – You can change the contents of drop-down lists and update various aspects of the system by selecting the Tools hyperlink in the main menu.

- Update Vendor - Use the arrow buttons to scroll through the vendors list and make any changes that you wish, such as updated address or other notes. Click the New Vendor button to add a new vendor to the list. The new vendor will be added to the list of available vendors to purchase from in the purchase order. Click the Close button to exit the form and return to the main menu.
- Update Cost Centers – Be aware that any changes that you make to a specific cost center will update all previous purchase orders with the old cost center to the new cost center. Use the arrow buttons to scroll and make changes. Pressing New Cost Center allows you to add a new cost center to the list. Click the Close button to return to the main menu.
- Use the same process described above to add/update payment types, purchasing agents, ship to addresses, and purchase order designation types, being aware that changes that you make will update past purchase order with the new information.