

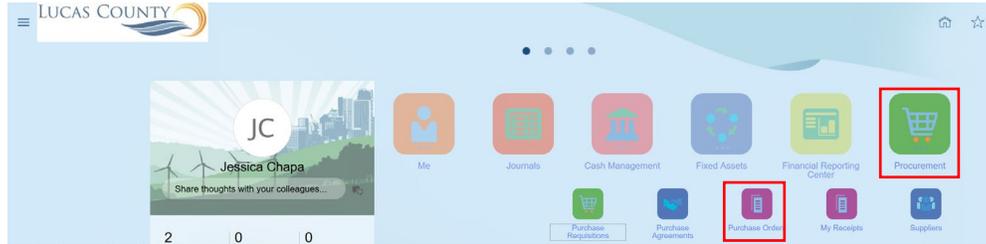
Create Purchase Order from Multiple Requisitions

Audience: Purchasing

Purpose: Use the Process Requisitions page to search for, select and group existing requisition demand, to create procurement documents. You can find the page in the Purchase Agreements or Purchase Orders work areas, using the Process Requisitions task.

Search for requisition lines using entered or saved search parameters. Select all requisition lines that meet your procurement needs. Once you have identified the appropriate requisition lines, you can add them to the document builder and create your order or negotiation. Define the document builder outcome using document type, document style, and line grouping.

When the application is configured to copy descriptive flexfields from requisition headers or lines to corresponding purchase order headers or lines, you cannot group requisitions and requisition lines. If you manually enter multiple lines in the Edit Document Builder page, line grouping options are disabled in the Actions drop-down list. This job aid will assist you with creating purchase orders from multiple requisitions.

Step	Action
1	Sign in as Procurement Buyer Home -> Procurement -> Purchase Orders. 
2	Click the Tasks icon.
3	Click on Process Requisitions link. 
4	Hold down the Ctrl button on the keyboard to highlight multiple Requisition Lines from multiple Requisitions .
5	Click the Add to Document Builder button.

	<p>Process Requisitions</p> <p>► Search</p> <p>Search Results: Requisition Lines</p> <p>Actions ▾ View ▾ Format ▾ Detach Wrap Add to Document Builder Return Reassign</p> <table border="1"> <thead> <tr> <th></th> <th>Requisition</th> <th>Line</th> <th>Line Description</th> </tr> </thead> <tbody> <tr> <td>▶</td> <td>⚠ 1178</td> <td>1</td> <td>ENVELOPES #10</td> </tr> <tr> <td>▶</td> <td>1152</td> <td>1</td> <td>Road Maintenance Repair - Asphalt fill for potholes</td> </tr> </tbody> </table>		Requisition	Line	Line Description	▶	⚠ 1178	1	ENVELOPES #10	▶	1152	1	Road Maintenance Repair - Asphalt fill for potholes
	Requisition	Line	Line Description										
▶	⚠ 1178	1	ENVELOPES #10										
▶	1152	1	Road Maintenance Repair - Asphalt fill for potholes										
6	<p>Click the Type list and accept the default of 'New Order.'</p> <p>Add All Selected</p> <p>Type <input type="text" value="New Order"/> ▾</p> <p>Source Agreement <input type="text"/> 🔍</p> <p>* Style <input type="text" value="Purchase Order"/> ▾</p> <p>Supplier <input type="text" value="A thru Z Tool & Party St"/> 🔍</p> <p>Supplier Site <input type="text" value="MAIN"/> ▾</p> <p>* Currency <input type="text" value="USD"/> ▾</p> <p style="text-align: right;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>												
7	Click the Style field. Accept the default of 'Purchase Order.'												
8	Click the Supplier field Search icon.												
9	<p>Enter Supplier name and click the Search button.</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>Search and Select: Supplier ✕</p> <p>▲ Search <input type="button" value="Advanced"/></p> <p style="text-align: right;">** At least one is required</p> <p>** Supplier <input type="text"/></p> <p>** Supplier Number <input type="text"/></p> <p>** Alternate Name <input type="text"/></p> <p style="text-align: right;">Search <input type="button" value="Reset"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Supplier</th> <th>Supplier Number</th> <th>D-U-N-S Number</th> <th>Alternate Name</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> </div>	Supplier	Supplier Number	D-U-N-S Number	Alternate Name								
Supplier	Supplier Number	D-U-N-S Number	Alternate Name										
10	Select the Supplier name from the resulting list, and click the OK button.												
11	Click the Supplier Site list, and select the desired Supplier Site.												
12	Click the OK button.												

13 From the Document Builder, click the **Create** button.

Document Builder

Requisitioning BU
Lucas County

Sold-to Legal Entity
Lucas County

Type
New Order

Source Agreement

Style
Purchase Order

Supplier
A thru Z Tool & Party Supply Rental, Inc

Supplier Site
MAIN

Currency
USD

Your Document Builder contains 2 lines.

Recently Added Lines

Road Maintenance Repai...	1.00 USD
ENVELOPES #10	0.00 USD
Total	1.00 USD

Edit **Create** **Clear**

16 Click the **OK** button.

17 In the General section, enter a description that will display in the Purchase Order header. Click in the **Description** field, and enter an appropriate description for the PO, for example, 'Consolidation of 3 Requisitions.'

Edit Document (Purchase Order): 26 ★

Check Funds **Manage Approvals** **View PDF** **Actions** **Save** **Submit** **Cancel**

Main Contract Terms

General

Procurement BU	Lucas County	Supplier	CDW-G Government, Inc.	* Currency	USD
Requisitioning BU	Lucas County	Supplier Site	MAIN	Ordered	200.00 USD
Sold-to Legal Entity	Lucas County	Supplier Contact		Total Tax	0.00 USD
Bill-to BU	Lucas County	Communication Method	None	Total	200.00 USD
Order	26	Bill-to Location	Auditor - Accounting	Description	
Status	Incomplete	Default Ship-to Location	Support Services	Requisition	61
Funds Status				Agreement	
* Buyer	CHAPA, JESSICA				
Creation Date	8/12/19				

Terms Notes and Attachments

Required Acknowledgment	None	Shipping Method		<input type="checkbox"/> Requires signature
Acknowledge Within Days		Freight Terms	None	<input type="checkbox"/> Pay on receipt
Payment Terms	Immediate	FOB	Destination	<input type="checkbox"/> Confirming order

Additional Information

18	Click the Check Funds button.
19	Click the OK button.
20	Click the Submit button.
23	Click the OK button.