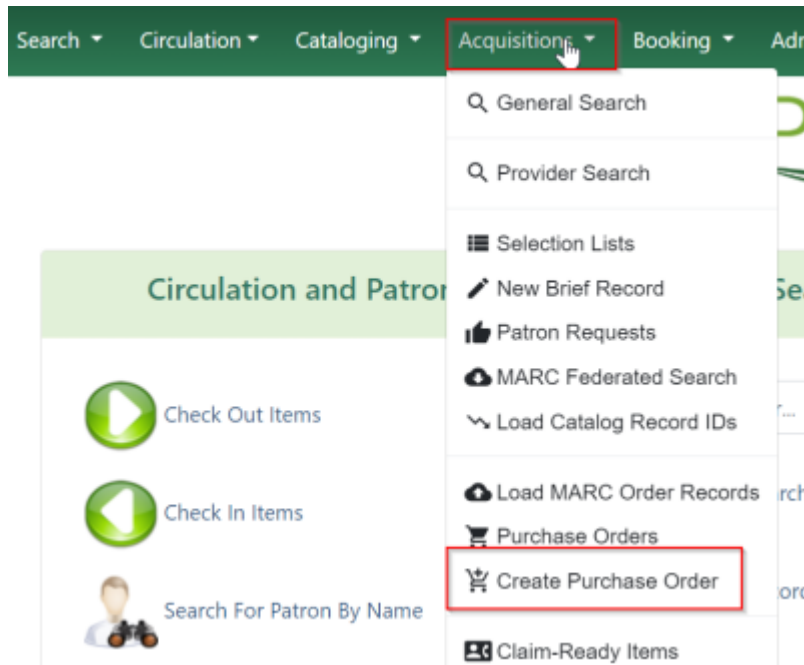


Purchase Orders: How To...

Create a blank purchase order

You can create a purchase order to which you can add brief records and charges.

1. Select **Acquisitions > Create Purchase Order**.



2. In the pop-up box that appears, ensure that the correct ordering agency shows in the *Ordering Agency* field. Correct if necessary.
3. In the Name field you can name your purchase order. If you choose not to create a name, the Purchase Order ID will become the name. The name can also be changed after the purchase order is created.
4. In the Provider field, you can use the dropdown to select your provider. If you don't see it in the list, you can start typing the provider's code and it will shorten the list to find it.
5. If prepayment is required, check the box adjacent to Prepayment Required.
6. Click the blue **Create** button.
7. The purchase order has been created. You can now add direct charges or add a brief record.

Purchase Order #12427 (pending)

PO ID:	12427	Status:	Pending / Activatable	Estimated Amount:	\$0.00
PO Name:	12427	Activated:	N/A	Encumbered Amount:	\$0.00
Provider:	For Testing Only (TESTING ONLY (PINES))			Spent Amount:	\$0.00
Line Items:	0	<input type="checkbox"/> Allow Activation with Zero-Item Line Items?		Prepayment Required?	No

Notes (0) | EDI Messages (0) | History | Print | [Activate Without Loading Items](#) | [Activate Order](#) | [Show PO in Legacy Interface](#)

Actions

New Line Item Note...

☐ Note is vendor-public

Apply To Selected

☒ Line Items In Page

☒ All Line Items

0 Selected

Show Filter & Sort Options

I<

<

>

Rows 25

No items to display.

Direct Charges, Taxes, Fees, etc. [New Charge](#)

Rename a purchase order

By default a new purchase order is given the purchase order ID as a name.

You can change the name to any grouping of letters or numbers as determined by your library's policies. You can reuse purchase order names as long as a name is never used twice in the same year.

1. Open or create a purchase order.
2. The name of the purchase order is in the top left column of the purchase order. The hyperlinked number is an internal ID number that Evergreen has assigned.

Purchase C

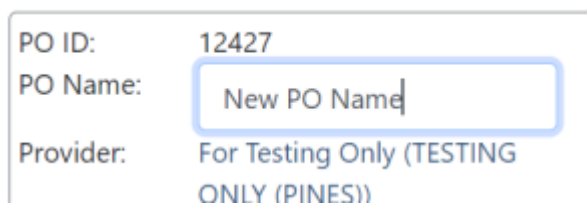
PO ID:	12427	Status:	Pending / Activatable
PO Name:	12427	Activated:	N/A
Provider:	For Testing Only (TESTING ONLY (PINES))		
Line Items:	0	<input type="checkbox"/> Allow Activation with Zero-Item Line	

Notes (0) | EDI Messages (0) | History | Print | [Activate Without Loadin](#)

Actions

New Line Item Note...

3. Click on the hyperlinked ID number. A pop-up box will appear.
4. Enter a new name for your purchase order. You can then either click out of the field, or hit Enter on your keyboard to save.



PO ID: 12427
PO Name: New PO Name
Provider: For Testing Only (TESTING ONLY (PINES))

5. The new name will replace the internal ID number as the purchase order's name.

6. You cannot use the same name as another PO. If you attempt to do so, you will get an alert below the text box letting you know it is a duplicate name, with a link to the other purchase order.



PO ID: 12427
PO Name: delete 12426
This name is already in used by another PO: View PO

Delete a purchase order

Currently there is no way for end users to delete purchase orders themselves. However, PINES has set up a nightly script to delete purchase orders that match certain criteria. If you want a purchase order to be deleted, you must make sure to edit the purchase order as follows:

- Rename the purchase order to include the full word “DELETE”. A common naming convention is to rename them as something like DELETE-[POID], like DELETE-3012.
- The purchase order must still be in a “pending” state, i.e. not on order or cancelled.
- There must be no line items on the purchase order. To delete all the line items at once, check the tick box for **All Line Items** and then choose **Actions→Delete Selected Line Items**.
- There must be no direct charges on the purchase order.
- There must be no purchase order notes.

If the purchase order does not meet all of these criteria, it will not be deleted.

View EDI messages

You can view electronic messages from your provider about a specific purchase order.

1. Open a purchase order.
2. In the top half of the purchase order, you see an *EDI Messages* field. The number of messages that are attached to the purchase order is hyperlinked in parentheses next to this field.

3. Click the hyperlinked number to view the messages.

PO ID:	12427	Status:	Pending / Activatable
PO Name:	12427	Activated:	N/A
Provider:	For Testing Only (TESTING ONLY (PINES))		
Line Items:	0	<input type="checkbox"/> Allow Activation with Zero-Item Line	
Notes (0) EDI Messages (0) History Print Activate Without Loading			

See the [Types of EDI messages](#) for more information on EDI messages.

Add brief records

See: [Add a brief record to a purchase order](#)

Add direct charges

You can add additional charges to any purchase order prior to activation. Possible charges include processing fees, cataloging fees, or shipping fees. See [Invoice Item types](#) for a list of the charge types available.

Some charge types in the list are labeled as “prorate.” When a prorate-able invoice item type is chosen from the drop down list, it means the system will divide the amount being charged proportionally among the funds in use based on how much is being spent out of each fund when the items are invoiced. On the purchase order it means the funds will be encumbered.

1. Open a purchase order that has not been activated.
2. Click the New Charge button at the bottom of the purchase order.

Line Items:	0	<input type="checkbox"/> Allow Activation with Zero-Item Line Items?
Notes (0) EDI Messages (0) History Print Activate Without Loading Items		
Actions <input type="text" value="New Line Item Note..."/>		
<input checked="" type="checkbox"/> Line Items In Page <input checked="" type="checkbox"/> All Line Items 0 Selected Show Filter & Sort Options		
No items to display.		
Direct Charges, Taxes, Fees, etc. New Charge		

3. A line updater opens.

Direct Charges, Taxes, Fees, etc. [New Charge](#)

Charge Type	Fund	Title/Description	Author	Note	Estimated Cost
<input type="text" value="Charge Type..."/>	<input type="text" value="Fund..."/>	<input type="text" value="Title..."/>	<input type="text" value="Author..."/>	<input type="text" value="Note..."/>	<input type="text" value="Estimated Cost..."/>

[Save](#) [Edit](#) [Remove](#)

You'll notice that there are three required fields: Charge Type, Fund, and Estimated Cost.

4. Click on Charge Type and pick a charge from the drop down list.

No items to display.

Blanket Order

Cataloging Charge

Cataloging Charge Prorated

Credit From Vendor

Database Access

Database Access - Prorated

Charge Type...

Fund...

Title...



The list of Charge Types is a PINES default. See [Invoice Item Types](#) for a full list. If you need new charges added to the list, please open a Helpdesk ticket.

5. Choose your charge type, fund, and enter estimated price. You can also include Title/Description, Author, and/or a Note if those are useful information to you.

6. Click **Save**.

7. The new charge will appear at the bottom of your PO. The total of the new charges has been added to the Total Estimated displayed at the top of the purchase order.

Disencumber direct charges

Activate a purchase order

When you activate a purchase order, you are accomplishing several different things:

- Debits are created in your funds, so your money is now encumbered
- If your provider is an EDI vendor, the order is queued up and subsequently sent to the vendor
- Temporary Acquisitions barcodes are created

Before you can activate an order, Acquisitions does several checks automatically, but some you need to do on your own.

Acquisitions will automatically:

- Check that each copy has a fund assigned
- Check that each copy has a branch assigned
- Check if encumbering your order would overencumber your assigned funds past your warning or stop limits
- Check if each title has a quantity
- Check if each title has a price



Although Acquisitions looks for these, if it finds any issues you will need to resolve them by adding the missing information.

Checks that you need to do:

- Check that no line items have “link to catalog”.



Instead of looking line by line for “link to catalog”, do a CTRL+F on your keyboard and search for “link”. If there are any instances in the page of the word “link”, they will be highlighted.

Fixes for Errors

Error	Fix
The requested acq.fund was not found (ACQ_FUND_NOT_FOUND)	One or more of your copies is missing a fund. Click Expand All so you can see all copies, and look for one that's missing a fund. Use the batch updater or the Copies link to add a fund.
The lineitem has no price (ACQ_LINEITEM_NO_PRICE)	One or more of your titles is missing a price. Add a price in the Estimated Price field.
The lineitem has no attached copies (ACQ_LINEITEM_NO_COPIES)	One or more of your titles has a zero quantity. Add a quantity of 1 or more to that lineitem using the batch updater or the Copies link.
Fund X would be encumbered beyond its stop level	The dollar amount you are trying to encumber using this fund exceeds its stop percentage. You need to edit some of your copies to use another fund. NOTE: If there are several funds that would be overencumbered past their stop or warning limits, you only are initially warned about the first one. It doesn't list all of them at once. When you refresh the page after editing funds, it will alert you if there is another fund with an issue.
Activatable: Yes, fund X would be encumbered beyond its warning level	You are still allowed to activate the order if you get this error, but the dollar amount you are trying to encumber will push you past your warning limit. If that's fine, you can activate.

Error	Fix
Event: 1586:ACTOR_ORG_UNIT_NOT_FOUND → The requested actor_org_unit was not found	One of your copies is missing a branch.
Event: 1228:BIB_RECORD_DELETED → The requested bib record is marked as deleted	Sometime between when you uploaded your order and are now trying to activate, one of the bib records your titles are linked to was deleted out from underneath it. You can identify which title it is by running this report: Shared Folders>Templates>PINESacqadmin>Purchase Orders>Check why PO won't activate (filter by PO name) . Look for which title has "0" in the "Is Deleted?" column and undelete that bib record. If you do not have reports permissions/undelete bib record permissions/have trouble doing this, please open a Helpdesk ticket.

A note about link to catalog

If you started your upload and:

- You closed your upload before it was uploaded to the server
- Didn't have the correct settings on the upload screen
- There was some internal database issue out of your control

It may be that your line items stay saying "link to catalog" and never change to "catalog."



If any of your lineitems say "link to catalog," you will not be able to activate your order. Once you hit the Activate button, it will spin indefinitely.

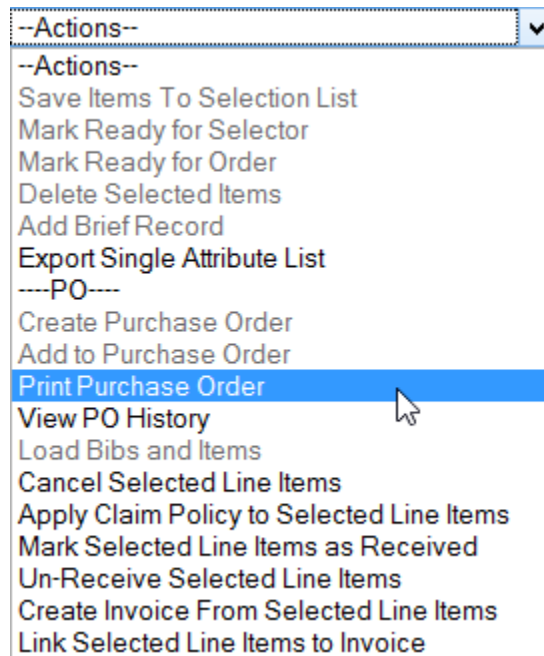
Very large orders (150+ titles) may take longer to finish the upload, but if after thirty minutes your queue has not started counting records processed, then there has been some enqueueing error and your purchase order is not going to complete. [Set this PO to delete](#) and try your upload again. If it fails again, open a Helpdesk ticket.

Activate without loading copies

Print a purchase order

You can print a purchase order from the purchase order screen. Any vendor-public notes will print in a section entitled *Notes to the Vendor* on the printed purchase order.

1. Open a purchase order.
2. Select **Actions > Print Purchase Order**.



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