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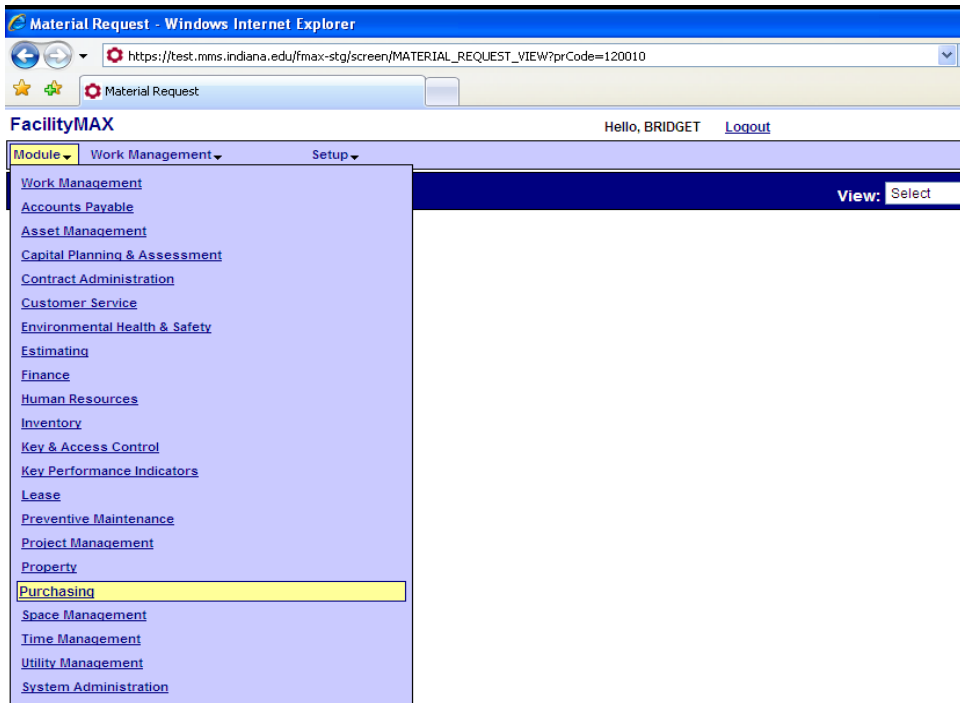
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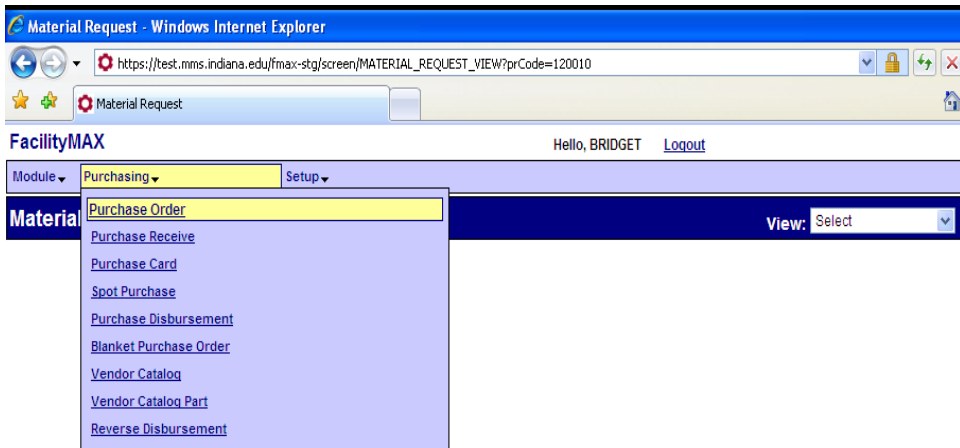
This manual will walk you through the steps of creating a new purchase order.

Purchase orders can be created by

- Rolling a Material Request into a purchase order
- Manual entry of a purchase order
- A download from EPIC
(Only if your group is set up with the EPIC down load feature.)



From the Module Menu Choose Purchasing and from the Purchasing Menu choose Purchase Order.



Rolling a Material Request into a purchase order

Below you will see a blank PO Screen. Click on the NEW icon to enter a new PO.

The screenshot shows the FacilityMAX Purchase Order screen in a web browser. The interface includes a header with the user name 'Hello, BRIDGET' and a 'Logout' link. Below the header is a navigation bar with 'Module' and 'Purchasing' menus. The main area is titled 'Purchase Order' and contains several sections: 'Purchase Order' (with fields for Description, Editor, Edit Date, Status, Type, Markup Percent, Placed By, and PO Code), 'Contractor' (with fields for Contractor, Address Code, Blanket Number, Contact, and Terms), 'Dates' (with fields for Created, Review, Needed, and Expected), and 'Totals' (with fields for Currency, Sub Total, Discount, Tax, Shipping, Markup, and Total). The 'Line Items' section is at the bottom, showing a table with columns for Line, Vendor Part, Inventory Part, Description, UOM, Quantity, Line Total, and Status.

Enter the Description. Make sure the Status , Type and Mark up are correct. Put in the contractor number (or zoom to find it) . Make sure the address code is correct. Enter the work order or warehouse info. You can now add your shipping information.

The screenshot shows the FacilityMAX Purchase Order screen with data entered. The 'Purchase Order' section has '0200006' in the PO Code field, 'PURCHASE ORDER FOR TRAINING MANUAL' in the Description field, and 'OPEN' in the Status field. The 'Contractor' section has '38160118301' in the Contractor field, 'ALL-PHASE ELECTRIC SUPPLY CO.' in the Address Code field, and 'BL' in the Blanket Number field. The 'Dates' section has '30 Mar 2009' in the Created field. The 'Totals' section has 'USD' in the Currency field. The 'Line Items' section is at the bottom, showing a table with columns for Line, Vendor Part, Inventory Part, Description, UOM, Quantity, Line Total, and Status. A 'Load Material Request' button is visible in the top right corner of the Line Items section.

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmac-stg/screen/PO_EDIT

Purchase Order

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order View: Select

Purchase Order: 0200006 Editor: BLGENTRY Edit Date: Mar 30, 2009 10:46 AM

Description: PURCHASE ORDER FOR TRAINING MANUAL

Status: OPEN

Type: PO

Markup Percent: 10.00%

Placed By: BLGENTRY

PO Code: 200006

Contractor: 38160118301 ALL-PHASE ELECTRIC SUPPLY CO. Address Code: BL

Dates: Created: 30 Mar 2009 Review: Needed: Expected:

Totals: Currency: USD Sub Total: \$0.00 Discount: \$0.00 Tax: \$0.00 Shipping: \$0.00 Markup: \$0.00 Total: \$0.00

Line Items

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status
------	-------------	----------------	-------------	-----	----------	------------	--------

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At the top of your screen go to the view drop down menu and choose Shipping Information.

On the Shipping screen, fill in warehouse, shipment type, ordered by (this replaces "requestor" from focus) and the address. Click the green done flag.

Shipping Information - Windows Internet Explorer

https://test.mms.indiana.edu/fmac-stg/screen/PO_SHIPPING_EDIT

Shipping Information

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Shipping Information

Purchase Order: 0200006 Editor: BLGENTRY Edit Date: Mar 30, 2009 10:46 AM

Description: PURCHASE ORDER FOR TRAINING MANUAL

Shipping: Warehouse: BPP MAIN SHIPMENT Type: STANDARD Ordered By: RKREBS

Address: Attention: RAYMOND KREBS Address 1: 1800 N. RANGE ROAD Address 2: City: BLOOMINGTON County: MONROE State: IN Zip: 47408 Country: US

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Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmac-stg/screen/PO_EDIT

Purchase Order

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order View: Select

Purchase Order: 0200006 Editor: BLGENTRY Edit Date: Mar 30, 2009 10:46 AM

Description: PURCHASE ORDER FOR TRAINING MANUAL

Status: OPEN Type: PO PURCHASE ORDER Markup Percent: 10.00% Placed By: BLGENTRY RAYMOND KREBS PO Code: 200006

Contractor: 38160118301 ALL-PHASE ELECTRIC SUPPLY CO. Address Code: BL Blanket Number: Contact: Terms:

Dates: Created: 30 Mar 2009 Review: Needed: Expected:

Totals: Currency: USD Sub Total: \$0.00 Discount: \$0.00 Tax: \$0.00 Shipping: \$0.00 Markup: \$0.00 Total: \$0.00

Defaults Work Order: 1038844 001 Warehouse:

Line Items Load Material Request

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status

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Now you are ready to add your line items. In this example we are going to roll a material request into a purchase order. Click on Load Material Request. Below you will see a material request that I have finalized. Check the box on the left and click the green done flag.

Load Material Request - Windows Internet Explorer

https://test.mms.indiana.edu/fmac-stg/screen/PO_LOAD_MAT_REQUEST_LINES

Load Material Request

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Load Material Request

Transaction	Line	Vendor Part	Description	Part	UOM	Quantity	Cost
<input checked="" type="checkbox"/>	120010	1	123456 SOCKET	LIGHT FIXTURE SOCKET	EA	5	10.56

Done

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/max-stg/screen/PO_EDIT?poCode=200006

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order View: Select

Purchase Order: 0200006 Editor: BLGENTRY Edit Date: Mar 30, 2009 10:46 AM

Description: PURCHASE ORDER FOR TRAINING MANUAL

Status: OPEN Type: PO PURCHASE ORDER Markup Percent: 10.00% Placed By: BLGENTRY RAYMOND KREBS PO Code: 200006

Contractor: 38160118301 ALL-PHASE ELECTRIC SUPPLY CO. Address Code: BL Blanket Number: Contact: Terms:

Dates: Created: 30 Mar 2009 Review: Needed: 3 Apr 2009 Expected:

Totals: Currency: USD Sub Total: \$54.90 Discount: \$0.00 Tax: \$0.00 Shipping: \$0.00 Markup: \$0.00 Total: \$54.90

Defaults Work Order Warehouse

Line Items Load Material Request

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status
1	123450CKET		LIGHT FIXTURE SOCKET	EA	5	\$54.90	Open

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As you can see, the line(s) from the material requests are automatically brought into the PO. If you do not need to make any changes to the line items, you can make sure your status is at finalized and click on the save icon.

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/max-stg/screen/PO_VIEW?poCode=200006

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order View: Select

Purchase Order: 0200006 Editor: BLGENTRY Edit Date: Mar 30, 2009 11:08 AM

Description: PURCHASE ORDER FOR TRAINING MANUAL

Status: FINALIZED Type: PO PURCHASE ORDER Markup Percent: 10.00% Placed By: BLGENTRY RAYMOND KREBS PO Code: 200006

Contractor: 38160118301 ALL-PHASE ELECTRIC SUPPLY CO. Address Code: BL Blanket Number: Contact: Terms:

Dates: Created: Mar 30, 2009 Review: Needed: Apr 03, 2009 Expected:

Totals: Currency: USD Sub Total: \$54.90 Discount: \$0.00 Tax: \$0.00 Shipping: \$0.00 Markup: \$0.00 Total: \$54.90

Line Items

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status
1	123450CKET		LIGHT FIXTURE SOCKET	EA	5	\$54.90	Open

Manual Entry of Purchase Orders

The screenshot shows the FacilityMAX Purchase Order screen. The top navigation bar includes 'Module' (Purchasing), 'Setup', and 'Reports'. The main header displays 'Purchase Order' and 'View: Select'. The form is divided into several sections:

- Purchase Order:** PO Number 0200007, Editor BLGENTRY, Edit Date Mar 30, 2009 11:09 AM, Status OPEN, Type PO, Markup Percent 10.00%, Placed By BLGENTRY, PO Code 200007.
- Description:** PURCHASE ORDER FOR TRAINING MANUAL.
- Contractor:** 38160118301, ALL PHASE ELECTRIC SUPPLY CO., Address Code BL, Blanket Number, Contact, Terms.
- Dates:** Created 30 Mar 2009, Review, Needed, Expected.
- Totals:** Currency USD, Sub Total \$0.00, Discount \$0.00, Tax \$0.00, Shipping \$0.00, Markup \$0.00, Total \$0.00.
- Line Items:** A table with columns: Line, Vendor Part, Inventory Part, Description, UOM, Quantity, Line Total, Status. A 'Load Material Request' button is present.

When you are manually entering line items, you will fill out the top portion of the PO, and the shipping information as we did in the material request roll over sample.

When you are ready to add a line item, click on the small green plus on the line items portion of your screen.

Then you will see the screen below to choose Stock, Catalog or non-stock.

The screenshot shows the FacilityMAX Add New Line Item screen. The top navigation bar includes 'Module' (Purchasing), 'Setup', and 'Reports'. The main header displays 'Add New Line Item' and 'View: Select'. The form is divided into several sections:

- Add New Line Item:** A section with a 'Load Material Request' button.
- Line Item Type:** A section with a 'Please Select' label and three radio buttons: Stock, Catalog, and Non-Stock.

Purchase Order Line Item - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/PO_LINE_ITEM_EDIT

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order Line Item View: Select

Line	2	Editor	BLGENTRY	Status	Open
		Edit Date	Mar 30, 2009 11:19 AM		
Description	TEST MANUAL LINE ENTRY PO PART			Subledger	Material
				External Reference Code	
				Purchase Order	0200007
				PURCHASE ORDER FOR TRAINING	

Vendor	Inventory	Totals	Refresh Totals
Vendor Part	Inventory Part	SubTotal	\$54.90
UOM	UOM	Discount	(\$0.00)
EACH		Tax 1	\$0.00
Unit Cost	Unit Cost	Tax 2	\$0.00
\$10.9900	\$0.0000	Tax Rebate	(\$0.00)
Issue Factor		Shipping	\$0.00
1		Markup	10.00% \$5.49
Order Quantity	Stock Quantity	Line Total	\$60.39
5	5.0000		

Disbursement Defaults							
Sequence	Work Order	Phase	Description	Warehouse	Bin	Quantity	SubTotal
1	1020044	001				5	\$60.39

Fill in the description, part, uom, cost and quantity. Click on the large green and white plus at the top of the screen to add additional lines.

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/fmax-stg/screen/PO_VIEW?poCode=200007

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup

Purchase Order View: Select

Purchase Order	0200007	Editor	BLGENTRY	Status	FINALIZED
		Edit Date	Mar 30, 2009 11:22 AM		
Description	PURCHASE ORDER FOR TRAINING MANUAL			Type	PO
				Purchase Order	
				Markup Percent	10.00%
				Placed By	BLGENTRY
				RAYMOND KREBS	
				PO Code	200007

Contractor	Dates	Totals
Contractor	Created	Currency
38160118301	Mar 30, 2009	USD
ALL-PHASE ELECTRIC SUPPLY CO.		Sub Total
Address Code	Review	\$54.90
BL		Discount
Blanket Number	Needed	\$0.00
Contact	Expected	Tax
		\$0.00
		Shipping
		\$0.00
		Markup
		\$5.49
		Total
		\$60.39

Line Items						
Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total
2	123450CKET		TEST MANUAL LINE ENTRY PO PART	EA	5	\$60.39
						Open

When you are done adding lines, click on the green done flag, change your status and then click on the save icon.

Purchase Orders from EPIC download

Just like you did in Focus, you will want to go to the purchase order screen and do a search. Click on the search icon in the upper right corner. In this example, I looked for EPIC in the description by using “contains” and EPIC. I also chose the status OPEN so that I would only see new EPIC orders. To narrow it down even farther, I put a user name into the Placed by search field.

The screenshot shows the FacilityMAX web application interface. The search criteria are as follows:

Field	Operator	Value
PO Code		
Description	contains	EPIC
Purchase Order		
Shipment Type		
Date Needed		
Date Expected		
Ordered By		
Status		OPEN
Contractor		
Address Code		
Warehouse		
Placed By		JNEIHART
Attention		
Address 1		
Address 2		
City		
State		
Zip		
County		
Country		
Term Code		
Type		
Review Date		
Markup		

As you can see, only 4 records met the search criteria. Click on a purchase order number to open it.

The screenshot shows the FacilityMAX web application interface displaying the search results for purchase orders. The results are as follows:

Purchase Order	PO Code	Description	Status	Contractor	Address Code	Blanket Number	Contact	Warehouse	Shipment Type	Requestor	Editor	Edit Date
109971	109971	EPIC PO #443442	OPEN	352134504	BL			BCAMP		JNEIHART	FF	Jul 03, 2008
120920	170920	EPIC PO #507500	OPEN	316749705	BL			BCAMP		JNEIHART	FF	Nov 12, 2008
120920	170920	EPIC PO #500519	OPEN	35149129900	BL			BCAMP		JNEIHART	FF	Nov 13, 2008
109202	102007	EPIC PO #520702	OPEN	36115020010	BL			BCAMP		JNEIHART	FF	Jan 09, 2009

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/mam-rtg/screen/PO_VIEW?poCode=178926

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup Reports

Purchase Order View: Select

Purchase Order	178926	Editor	FF	Status	OPEN
Description	EPIC PO #507580	Edit Date	Nov 12, 2008 11:37 AM	Type	PO
				Markup Percent	PURCHASE ORDER
				Placed By	JNEIHART
				JILL NEIHART	
				PO Code	178926

Contractor	316749785	Dates		Totals	
Contractor	SOWLE, ELIZABETH A	Created	Nov 12, 2008	Currency	USD
Address Code	BL	Review		Sub Total	\$1,512.00
Blanket Number		Needed		Discount	\$0.00
Contact		Expected		Tax	\$0.00
Terms				Shipping	\$0.00
				Markup	\$0.00
				Total	\$1,512.00

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status
1	1		LARGE RED HOLIDAY BOWS FOR VARIOUS LOCATIONS ON CAMPUS.	EA	360	\$1,512.00	Open

Record 2 of 4

Click on the edit icon and make any changes needed to the po. Make sure the status is correct after you have made your changes and then click on the save icon.

Purchase Order - Windows Internet Explorer

https://test.mms.indiana.edu/mam-rtg/screen/PO_EDIT?poCode=178926

FacilityMAX Hello, BRIDGET Logout About Help

Module Purchasing Setup Reports

Purchase Order View: Select

Purchase Order	178926	Editor	FF	Status	FINALIZED
Description	EPIC PO #507580	Edit Date	Nov 12, 2008 11:37 AM	Type	PO
				Markup Percent	
				Placed By	JNEIHART
				JILL NEIHART	
				PO Code	178926

Contractor	316749785	Dates		Totals	
Contractor	SOWLE, ELIZABETH A	Created	12 Nov 2008	Currency	USD
Address Code	BL	Review		Sub Total	\$1,512.00
Blanket Number		Needed		Discount	\$0.00
Contact		Expected		Tax	\$0.00
Terms				Shipping	\$0.00
				Markup	\$0.00
				Total	\$1,512.00

Defaults Work Order Warehouse

Line	Vendor Part	Inventory Part	Description	UOM	Quantity	Line Total	Status
1	1		LARGE RED HOLIDAY BOWS FOR VARIOUS LOCATIONS ON CAMPUS.	EA	360	\$1,512.00	Open

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