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# PURCHASING USER MANUAL

## CREATING AN ADDRESS LIST OF BILL TO, SHIP TO, AND PURCHASE ORDER ADDRESSES

### INTRODUCTION

Administrators can create an address list for billing and shipping addresses as well as the address for their agency that will print on the purchase order. Requesters and purchasers can then select from the address list when they create line items for their requisitions or purchase orders in order to specify different addresses for shipping and billing.

The **Address** screen is comprised of the list of addresses that you have saved (if any) and a form to add a new address or update an existing one.

Figure 1 - Address screen

The screenshot shows the 'Address Maintenance' screen. At the top, there are tabs for 'User Maint', 'Agency', 'Address', and 'PO Notes'. Below the tabs, there is a title 'Address Maintenance' and radio buttons for filtering: 'Active' (selected), 'Non Active', and 'All Addr'. A table lists several addresses with columns for Name, Group, Description, Act, Ship, Bill, Contact, and Address. Below the table is a form to add a new address, including fields for Name, Group, Contact, Address, City, State, Zip, Phone, ext, Fax, and Desc. There are also checkboxes for 'Active Address', 'Default Shipping', 'Default Billing', and 'PO Form Address'.

Name	Group	Description	Act	Ship	Bill	Contact	Address
Select College Idaho	Southern Idaho	College of Southern Idaho	✓			Attn: Claudeen W Campbell	315 Falls Avenue, P
Select Dept Admin	Management	Main Boise Office	✓			Attn: Rebecca K Thomason	650 West State roo
Select Forensic Servc	Region 5 Lab	Idaho State Forensic Services	✓			Attn: Supervisor Donald Peck	209 E Lewis
Select Forensic Service	Region 3 Lab	Idaho State Forensic Services	✓	✓	✓	Latent Fingerprint Supr Randy Meade	700 S Stratford Driv

Once addresses are added, you can filter the list of addresses by selecting **Active**, **Non-Active**, or **All Addr**. You can also click the column headers to sort the list.

### TO ADD A NEW ADDRESS

1. Complete the address fields as needed. The required fields are **Address**, **City**, **State**, and **Zip**. The **Phone** number must be entered without a hyphen (5552222). The **Name** field simply identifies the address on the **Address** screen and helps users [select addresses](#) when creating requisitions or purchase orders. It is not printed on a purchase order or on any reports.
2. Be sure the **Active Address** check box is checked.

3. Enter a **Group** name and **Desc** (description), if desired. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and **\**. These identify the address on the **Address** screen and help users [select addresses](#) when creating requisitions or purchase orders. They are not printed on a purchase order or on any reports.
4. Enter **Contact** information – for example, a name, department, business entity, etc.. This will print on a purchase order. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and **\**.
5. Check either **Default Shipping** or **Default Billing**, or **PO Form Address**. (The **PO Form Address** will be your agency’s address printed on the purchase order.)
6. Click **Add New Address**.
7. To add another address, click **Cancel** (this will clear the form but not cancel the address just added.)

All three addresses will be printed on a purchase order:

Figure 2 - Purchase order form

The screenshot shows a purchase order form for the State of Idaho. At the top left is the state seal. The agency name 'Agency : 140 State Controller' is highlighted with a red oval. Below it, the address '800 W. Main Street Sun Valley Id 83566' and phone number '(208) 5551111 201, fax' are also highlighted with a red oval. A red callout box labeled 'PO Form Address' points to this address information. The purchase order number 'Purchase Order 95688' is displayed. Below this, there are fields for 'Purchasing Agent' (JAMES CARTER (04/02/2008)) and 'Supplier'. A red callout box labeled 'Default Shipping and Default Billing addresses' points to the 'Item Shipping Address' field in the table below. The table has columns for 'Item No', 'Quantity', 'U/M', 'Attachment', 'Pri', and 'Ext'. The first row shows 'HDMI Cables' with a quantity of 4, unit 'Each', price 45.00, and total 180.00. Below the table, two attention lines are highlighted with a red oval: 'Attn: Rebecca K Thomason, 650 West State room 100, PO Box 83720 Boise ID, 83720 (208) 3321824' and 'Attn: Supervisor Donald Peck, 209 E Lewis Pocatello ID, 83201 (208) 2329474'.

## TO EDIT AN ADDRESS

1. Click **Select** next to an address in the address list.
2. Edit the address as needed.
3. Click **Update Address**.

## TO DELETE AN ADDRESS

Although an address cannot actually be deleted, you can hide it from the default view in the Administration screen and also from the view of requesters and purchasers so they cannot select an old or incorrect address.

1. Click **Select** next to an address in the address list.
2. Uncheck the **Active Address** check box.
3. Click **Update Address**.

## TO SELECT AN ADDRESS FOR A REQUISITION OR PURCHASE ORDER

The address list is available to users when they create a requisition or purchase order. Users will click the line item **Menu** and select either **Edit Ship-To Address** or **Edit Bill-To Address**. Users can then select an address to apply to one or all line items in the requisition or purchase order.

Figure 3 - Select an address

