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# PURCHASING USER MANUAL

## CLEAR, VOID, OR REJECT A PURCHASE ORDER

### CLEAR A PURCHASE ORDER

The options to ‘delete’ a purchase order vary depending on if a purchase order number has been automatically assigned or manually entered.

- If purchase order numbers are set up to be automatically assigned, but the number has not yet been assigned (i.e., the purchase order has not been ordered), the purchaser can **Clear** the purchase order. The line items will be available for a new purchase order. The assigned *tracking number* will not be reused.
- There will not be an option to clear a PO with a manually entered number because a manually entered number is required before a PO can be saved. It can be voided.

On the **PO** screen: click **Clear**.

Figure 1 - Clear the purchase order

The screenshot shows the 'PO' screen with the following details:

- PO Status: PO
- MPO: My PO Dept
- PO #: [Blank]
- Tracking #: 4253
- Vendor #: 820222034 -00 A-1 HEATING & AIR CONDITIONING
- State Contract: [Blank]
- Required Delivery: [Blank]
- PO Options: None
- Status: New Purchase Order
- Total: \$91.35
- PO Created: JAMES (02/03/2012)
- PO Edited: JAMES (02/03/2012)
- Buttons: New PO, Save, Print Preview, Ordered, Clear (circled in red)

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	Freight
<input checked="" type="checkbox"/>	Menu TEST1234	01/28/2009			Ready for Purchasing	123 E	TEST SPEED 5	10	Set	2.64	0.00
<input checked="" type="checkbox"/>	Menu TEST1234	01/28/2009			Ready for Purchasing	123 F	TEST SPEED 6	5	Package	12.99	0.00

### VOID A PURCHASE ORDER

- If the purchase order number has been either automatically assigned or manually entered, the purchaser can **Void** the purchase order. Voiding the purchase order puts the line items back on the PO screen. The purchaser can add these items to a new PO, reject them back to the requester, or cancel them. The voided purchase order number cannot be reused.
- If any items have been ordered and received, you cannot void a purchase order, but you can reject, cancel, or remove the line items not received.
- Voided POs can be found on the **PO Status** or **Reports** tab of the **Purchase Orders** menu or the on the **Processed** menu.

On the **PO** screen, click **Void PO**.

Figure 2 – Void the purchase order

The screenshot shows the 'PO' screen with the following details:

- Department: R&D: Research and Developer
- PO #: PO907
- Vendor #: 820300144 - 00 GARDEN CENTER WEST INC
- Status: In Purchasing
- Total: \$175.80
- Buttons: New PO, Save, Print Preview, Ordered, and Void PO (circled in red).

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 20080008	04/18/2008			Assigned to PO	00455	Grass Seed	11	Bag	15.00	165.00
<input checked="" type="checkbox"/>	Menu WRK80018	12/21/2007			Assigned to PO		Fertilizer	9	Bag	1.20	10.80

## VOIDED ENCUMBRANCES

If a purchase order has been ordered with encumbered line items and then is voided, the application will send a TC225 for each encumbered line item. For these line items, if the **MOD** field is blank, STARS will treat it as a partial just as if the user had entered a “P”. If the user enters an “F”, STARS will finalize it.

## REJECT A PURCHASE ORDER

An approver can reject a purchase order after it has been approved. The purchase order would go back to the purchaser for changes. The purchaser can edit and re-save the purchase order, keeping the same purchase order number, vendor information, etc.

On the **PO** screen, click **Reject**.

Figure 3 - Reject a purchase order

The screenshot shows the 'PO' screen with the following details:

- Department: R&D: Research and Developer
- PO #: 6235-Sx
- Vendor #: 731459340 - 01 OPTICAL SURVEILLANCE SYSTEMS INC
- Status: Ready for Approval
- Total: \$445.00
- Buttons: New PO, Save, Print Preview, Ordered, Reject (circled in red), and Void PO.

Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	333-ABC	Binoculars	3	Each	89.00	267.00
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Ordered	8456AMC	Binoculars	2	Each	89.00	178.00