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PURCHASING USER MANUAL

SPLITTING PURCHASE ORDER LINE ITEMS

INTRODUCTION

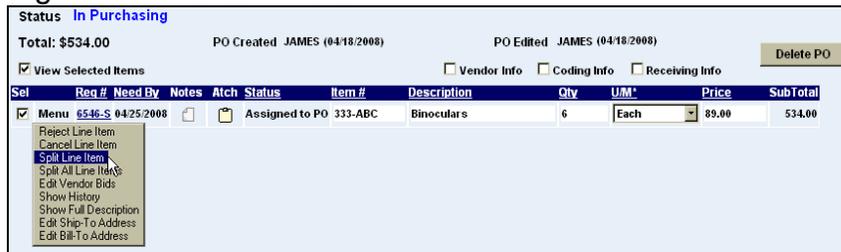
A purchaser can split a requisition line item in order to purchase different model numbers or descriptions. For example, a single line item request for a computer may need to be split into separate purchase order line items as a computer, monitor, keyboard, and mouse. A purchaser can change the Item #, Description, Quantity, Unit of Measurement, and Price. A purchaser cannot split requisition line items to change the fiscal coding.

TO SPLIT PURCHASE ORDER LINE ITEMS

After selecting the requisition line items and saving the purchase order, Use the line item **Menu** on the **PO** screen.

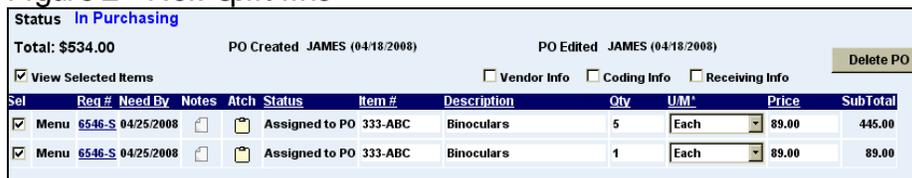
1. Click **Menu** next to the line item that you need to split.
2. Click **Split Line Item**. (If the quantity (**Qty**) is greater than 2, you can also click **Split All Line Items** to create separate rows for each single item.)

Figure 1 - Line item menu



3. Click **OK** in the confirmation dialogue box.
4. The split line will be a duplicate of the original. The quantity (**Qty**) of the new line is '1' and the original line's quantity is reduced by one. If the original line is a quantity of 1, the duplicate line will be a quantity of 0 and the Price will be duplicated.

Figure 2 - New split line



- Change the line items as needed. A purchaser can change only the Item #, Description, Quantity, Unit of Measurement, and Price. If the fiscal coding needs to be changed, the purchase must use the Menu to select Reject Line Item, and then the fiscal coding can be changed on the request. Do not use special characters or symbols, including &, ', “, <, and \, in the **Description** field.

Figure 3 - Changed item number and quantity

Status In Purchasing											
Total: \$534.00			PO Created JAMES (04/18/2008)			PO Edited JAMES (04/18/2008)			<input type="button" value="Delete PO"/>		
<input checked="" type="checkbox"/> View Selected Items <input type="checkbox"/> Vendor Info <input type="checkbox"/> Coding Info <input type="checkbox"/> Receiving Info											
Sel	Req #	Need By	Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Assigned to PO	333-ABC	Binoculars	3	Each	89.00	445
<input checked="" type="checkbox"/>	Menu 6546-S	04/25/2008			Assigned to PO	8456AMC	Binoculars	2	Each	89.00	89

- Click **Save** when finished.
- Depending on your agency's process, the purchase order can be approved and/or ordered when finished. NOTE: Split lines can be deleted, but the original line cannot.
- The requisition will be automatically updated and the requester can also see the split items on the **Requisitions** screen.

Figure 4 - Requisition with split line items

Status Requisition Approval Reports										
Department RAD: Research and Development			Req # 6546-S		Tracking # 298		<input type="button" value="New Requisition"/>		<input type="button" value="Save"/>	
Need by 04/25/2008			All or Nothing <input type="checkbox"/>		Req Notes <input type="checkbox"/>		Req Atch <input type="checkbox"/>			
Desc Binoculars										
Status Ordered										
Requested by JAMES (04/18/2008)					Edited by JAMES (04/18/2008)					
<input type="button" value="Add Item"/>										
Total: \$445.00			<input type="checkbox"/> Vendor Info <input type="checkbox"/> Coding Info <input type="checkbox"/> Receiving Info							
Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow	
Menu	<input type="checkbox"/>	Ordered	333-ABC	Binoculars	3	Each	89.00	267.00	walkthru	
Menu	<input type="checkbox"/>	Ordered	8456AMC	Binoculars	2	Each	89.00	178.00	walkthru	