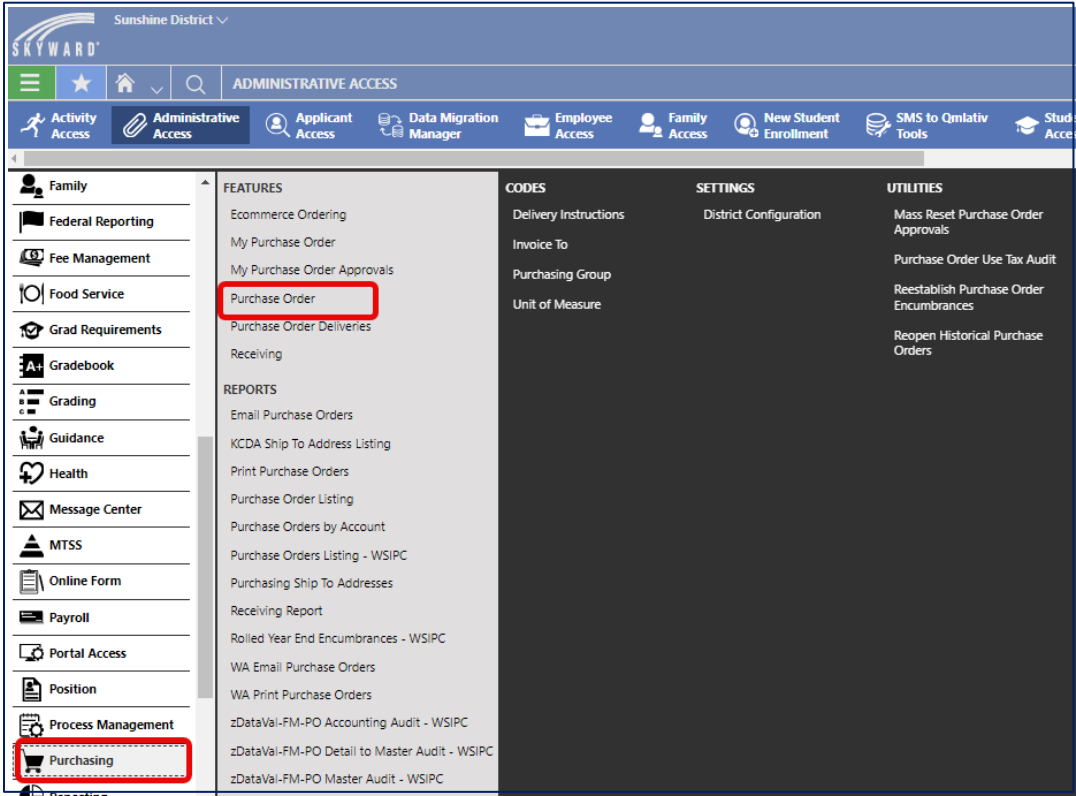
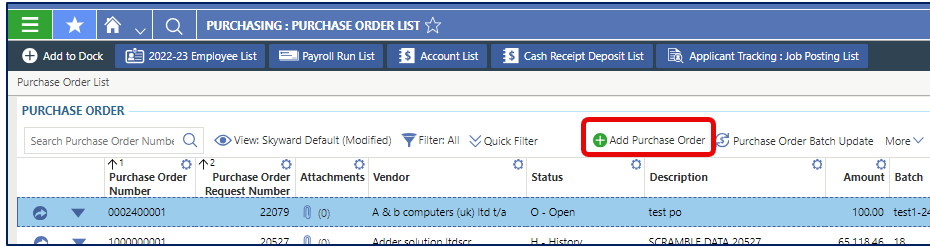


Purchase Orders in Skyward Qmlativ

Creating Purchase Orders

Menu Path: Administrative Access > Purchasing > Features > Purchase Order





1. Select Add Purchase Order.
Anything that has a red asterisk (*) must be included in the Purchase Order
2. Select your **Purchasing Group** for the location you are creating the Purchase Order.
3. Select your **Fiscal Year**.
4. Select **Blanket** if you are using this for a generic order in which you do not know which items you are purchasing.
5. If you are using eCommerce select the **Shop Online**.
6. Select **Vendor** (which must be setup prior to creating the Purchase Order).
7. Add a description for items being purchased for your own reference.
8. Enter a unique **Batch** number.
9. Add **Ship To** address.
10. Click on **Save and Add Detail**.

Add Purchase Order
Enter Purchase Order Details

Save & Add Detail Save Cancel

PURCHASE ORDER DETAILS

Attachments Add Attachments

*Purchasing Group 100 0110 SCRAMBLED PO GROUP

*Fiscal Year

Blanket

Warehouse

Shop Online

*Vendor A & b computers (uk) ltd t/a 10 Scramble avenue PO Box 196 Scramble, WV 55555

*Description Test

*Batch Test

*Invoice To InvoiceToDistrictNameID

*Ship To Tadeoscr, Steven B 1344 Scramble avenue Scramble, WV 55555

Delivery Instruction

Attention To Test

Commodity

Due Date

Contract

Ship Date

Has Tax

*Tax Date

11. **Purchase Order** will populate when all fields are entered.
12. **Merchandise** will default.
13. Enter a **Description**. This is what will show on your Purchase Order.
14. Select your **Quantity**.
15. **Units of Measure** i.e. Each, Amount, etc...
16. **Unit Cost** for each item ordered. Once that is entered **Entry Amount** and **PO Total** will populate.
17. Add **Account** code distribution.
18. Click the appropriate **Save** option at the top of the screen to save your work.

Please use Save & Submit Only

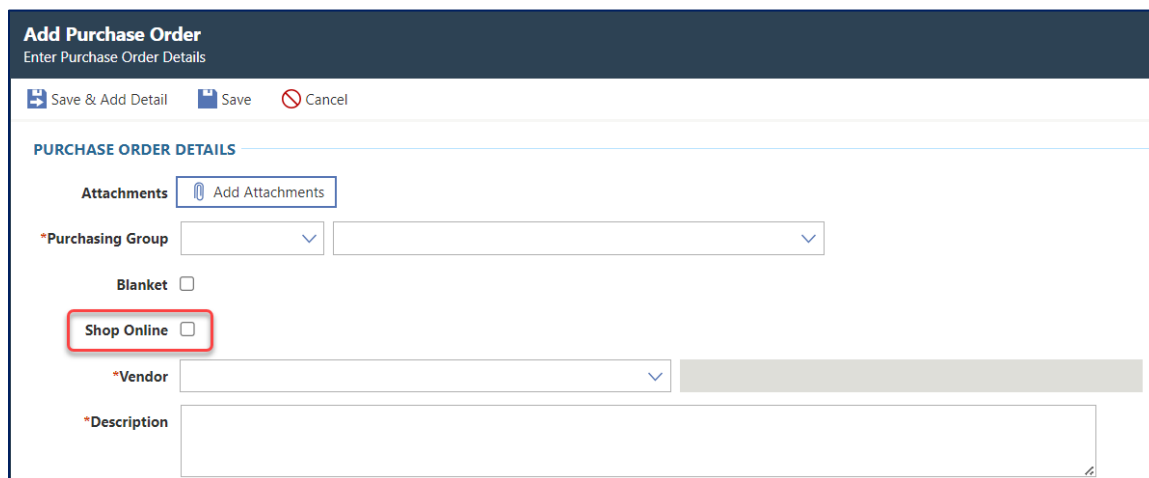
For Account Numbers please use the appropriate Account number listed on the Google Sheet "Purchase Order Account Numbers"

eCommerce Purchase Order

Menu Path: Administrative Access > Purchasing > Features > Purchase Order

NOTE: eCommerce Purchase Orders can technically be cloned, but the order will not be processed through the vendor's website. It is highly recommended that you do NOT clone an eCommerce order.

1. Select **Add Purchase Order**.
2. Complete anything that has a red asterisk (*) to be included in the Purchase Order.
3. Click box for **Shop Online**.



The screenshot shows the 'Add Purchase Order' form with the following fields and controls:

- Buttons: Save & Add Detail, Save, Cancel
- Section: PURCHASE ORDER DETAILS
- Attachments: Add Attachments
- *Purchasing Group: Two dropdown menus
- Blanket:
- Shop Online: (highlighted with a red box)
- *Vendor: A dropdown menu
- *Description: A text area

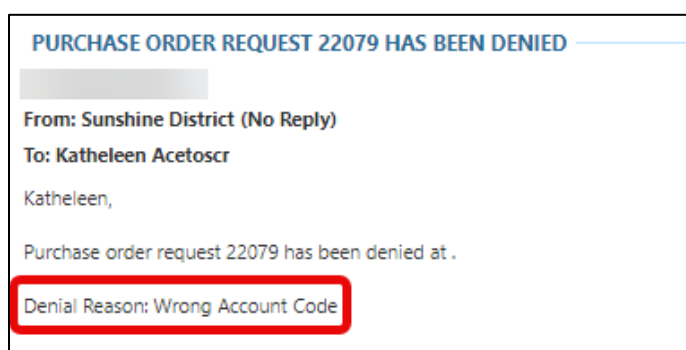
4. Ecommerce Vendors will be available to select in the **Vendor** field.
5. Click **Save and Add Detail** button. This will immediately take you out to the vendor's online ordering website.
6. Add needed items to your cart as you normally would from the vendor's website.
7. Click on the button that lets you place the order. The button might have different indicators on it depending on which vendor you are using. Examples are Submit these items for approval, Punchout, etc. Note: Once you submit the order you will be unable to make any line item (including product and product amount) changes.
8. Once you have checked out, you will be returned to the Assign Purchase Order Accountings to this Purchase Order screen.
9. Add Account Distribution.
10. **Save & Submit** or **Save** to save your work.

Editing/Resubmitting a Purchase Order

If your district uses the Approval Process for Purchase Orders, there is a possibility your Purchase Order could be denied. If your Purchase Order is Denied, you should get a message in your "My Messages."



The denial message should contain information as to why the Purchase Order was denied.



If the Purchase Order can be corrected, you can edit the Purchase Order and make the necessary changes for resubmission.

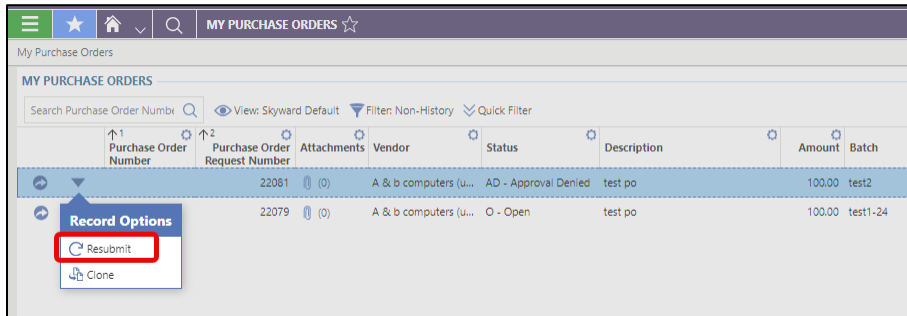
Menu Path: Administrative Access > Purchasing > Features > My Purchase Orders

1. Locate and **Open** the Purchase Order you need to edit by highlighting and selecting the Open Arrow on the left.
2. Select the **General** tab of the Purchase Order Details tab on the left, depending on what details need to be edited.
3. Where applicable, add/change the details on the Purchase Order to correct it.

NOTE: If you need to edit a specific detail line item, select the Purchase Order detail tab, highlight the detail line to be edited, and select the Open Arrow button to the left. This will open the specific detail line to make changes.

4. Select **Save Changes** or **Save and Back** to save your work.
5. Return to My Purchase Order List.

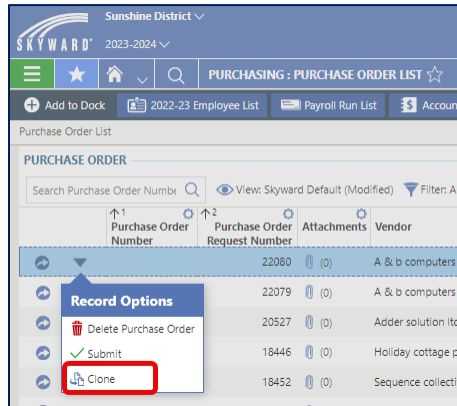
6. Select the **Down Arrow** to the left of the Purchase Order to Resubmit.
7. Select **Resubmit**.



Clone Purchase Order

Menu Path: Administrative Access > Purchasing > Features > Purchase Order

1. Click the drop-down arrow on the Purchase Order you wish to **Clone**.



2. Click **Save & Submit**, **Save & Add Another**, or **Save** to your work.