OregonBuys Release Purchase Order Guidance

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# Introduction

This guidance document will cover how to locate and review an ***“In Progress”*** status ***Release Purchase Order***, how to submit it for approval, and how to send it to the Vendor to be fulfilled. Only a Standard Release can become an In Progress Release Purchase Order, a Direct Release will convert from a *Release Requisition* into a Release Purchase Order in Sent status.

A Basic Purchaser will use a ***Release Purchase Order*** when purchasing off an existing contract or ***Master Blanket Purchase Order***(MBPO). This is in contrast to an ***Open Market Purchase Order***, which is used when there is no existing contract.

## High Level Process Flow

The following is a high-level process overview for OregonBuys.

Figure : High Level Process Flow

A screenshot of a computer

Description automatically generated with medium confidence

# Scenario

### General

In this guidance document the **Basic Purchaser** (BP) in the agency is finding and sending a ***Release Purchase Order*** to purchase laptops from an existing ***Master Blanket Purchase Order* (MBPO)**. This Release is for the Department of Purchasing’s Accounts division.

### Item

The line item associated with this Release is an Optical Ballot Scanner. The item comes from the Release Requisition.

### Accounting

The account code segments are input on this tab.

### Vendor

The line item that came from an established ***MBPO*** and ***Release Requisition*** also includes the vendor information on this tab.

There are no Subcontractors, Distributors, or Vendor Performance associated with this vendor.

### Routing

The Routing for approvals for this document may be set manually or selected at the point that the document is Submitted for Approval.

### Attachments

The Basic Purchaser should add attachments to document background information for this Release. In addition, the Agency may have set up standard documents (for example Terms and Conditions) to be attached to all Purchase Orders for the Agency.

### Notes

It is suggested that notes related to deadlines, approval information, contact information, or other information that the Basic Purchaser deems important for tracking or approving this Release Purchase Order be added on the Reminders and Notes tabs. It would be good practice for the Agency Procurement Team to establish standard procedures for these tabs.

### Summary

The Release Requisition should be submitted for any applicable approvals and the user will see the status change to **“Ready for Approval”.**

# Prerequisites

1. A Release Requisition from a “**Standard Release”** MBPO has been created and approved
2. Information specific to the services or supplies be purchased is known (e.g., quantity, price, shipping and billing addresses, etc.

# Locating the In-Progress Release Purchase Order

### Method 1 – Using the Purchase Order Viewer

1. A Department Access (DA) user from an organization will submit a **Release Requisition** from a **Standard Release Master Blanket Purchase Order**. The ***Requisition*** is approved, and the status is now ***Gone to PO****.*
2. The **Basic Purchasing** (BP) user will locate the ***In Progress*** ***Purchase Order*** as follows.
   1. If the ***In-Progress Purchase Order*** is assigned to you, it can be located by expanding the left navigation bar and clicking on ***Purchase Orders***.

Graphical user interface, application, website

Description automatically generated

The following image shows the menu options when the icon on the top of the left navigation bar is clicked.

Graphical user interface, application, website

Description automatically generated

1. Next, there will be a list of ***In-Progress Purchase Orders*** that are assigned to you, click the **document number** of the ***Purchase Order*** being worked on. This will then bring up the ***Summary* Tab** of that ***Purchase Order***.

Graphical user interface, application, table

Description automatically generated

1. Once ***Purchase Order*** is selected, the page will redirect to the ***Summary***tab of that ***Purchase Order***.

Graphical user interface, text, application, email

Description automatically generated

### Method 2 – Using Search

Another way to access the ***Purchase Order*** is by going back to the ***Home Page*** and entering in the ***Purchase Order number*** if known.

1. Enter in the ***Purchase Order number*** in the ***Navigation search bar*** located at the top of the page.
2. Let the system know what is being searched in the ***Navigation search bar*** by selecting ***Purchase Order*** from the **drop-down menu**.
3. Then click the **magnifying glass** to complete the search.
4. The screen will refresh twice landing back on the ***Summary* Tab** of that ***Purchase Order*.**

Graphical user interface, application, website

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# General Tab

Starting in the *General* Tab review the document and make any changes necessary

1. The ***Short Description***, ***Department*** and ***Location*** fields have been carried over from the ***Requisition*** document.
   1. If those fields or any other fields need to be modified, make the changes and then scroll down and click ***Save & Continue*.**

Graphical user interface, application

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Graphical user interface, application

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# Items Tab

1. Next, click on the ***Items*** tab. The items selected on the ***Requisition*** have been copied to the ***Purchase Order*.**
   1. Each item will have a ***Master Blanket***number and a ***Requisition*** number.
   2. The ***Master Blanket*** and ***Requisition*** numbers will show as links that can be selected if the user has access to the ***Master Blanket*** or ***Requisition*** that this ***Purchase Order*** came from.
2. To edited one of the listed items, click the item number and make any necessary changes on this screen.
3. Scroll down and click ***Save & Exit***.

Graphical user interface, text, application, email

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Graphical user interface, text, application

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# Vendor Tab

Next, review the ***Vendor* Tab**. Here the vendor will already be selected.

1. The ***Remit-to Address*** or ***PO Mailing Address*** can be updated if necessary.
   1. ***Payment, Freight, Shipping Terms****,* or the ***Shipping Method*** can also be selected on this page.
   2. ***Vendor Terms to the PO*** can also be applied if needed. This saves vendor terms to the document.
   3. Once all changes are made, click ***Save & Continue*.**

Graphical user interface, text, application

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# Address Tab

1. Next, review the ***Address Tab*** for any changes that need to be made.
2. Click ***Save & Continue*** after all changes have been completed.

Graphical user interface, text, application, email

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# Card Payment Tab

1. Next, review the ***Card Payment Tab*** for any changes that need to be made.
2. Click ***Save & Continue*** after all changes have been completed.

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# Accounting Tab

1. Next, review the ***Account Tab*** for any changes that need to be made.

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# Routing Tab

1. Next, review the ***Routing* *Tab*** for any changes that need to be made.

Graphical user interface, application

Description automatically generated

# Attachments Tab

1. Next, review the ***Attachment Tab*** for any changes that need to be made.

Graphical user interface, text, application

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# Notes Tab

1. Next, review the ***Notes* *Tab*** for any changes that need to be made.
2. Click ***Save & Cont*inue** after all changes have been completed.

Graphical user interface, text, application

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# Change Orders Tab

1. Next, review the ***Change Orders Tab*** for any changes that need to be made.

Graphical user interface, application, Word

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# Reminders Tab

1. Next, review the ***Reminders Tab*** for any changes that need to be made.
2. Click ***Save & Continue*** after all changes have been completed.

A screenshot of a computer

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# Summary Tab

1. Lastly, there is the ***Summary*** ***Tab*** where the ***Purchase Order*** is ready to be submitted for approval.
2. Scroll down to the bottom of the page and click ***Submit for Approval***.

Graphical user interface

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Graphical user interface, text

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1. The ***Summary* Tab** will refresh and the status of the ***Purchase Order*** will change to ***Ready for Approval****.*

Graphical user interface, text, application, Word

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# Purchase Order Approval

On the ***Home Page*** the ***POs Ready to Send*** status box will have a **“1”** in it, indicating that there is a ***Purchase Order*** ready to send.

1. Click on the box to see the list of ***Purchase Orders*.**
2. Click on the **document number** to open it.

Graphical user interface, text, application

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1. Once the ***Purchase Order*** is opened, the page will redirect to the ***Summary* *Tab*.**
   1. The status will show as ***Ready to Send*.**
   2. This allows the ***Purchase Order*** to be reviewed one more time before sending it to the Vendor.
2. Once reviewed and ready to send, scroll down to the bottom of the page and click ***Save & Continue***.
3. The page will refresh and the status in the top right corner will change to **“*Sent”.***
   1. The vendor is then emailed about the ***Purchase Order***, and they can log in to review the order and fulfill it as well.

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