Entering Purchase Orders in FMS

1. Click 📑 Purchasing

2. Click Quick Insert 📑 located to the right of 📑 Purchase Order
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3. Enter purchase order information: (The fields listed below will be **bolded**)

Required fields (highlighted by a red box):

a. **Purchase Order** (PO Number - FMS will automatically add this for you)

b. **Contractor** (Contractor 10-Digit Number)

c. **Address Code** (Address number FMS will populate after contractor is entered.)

d. **Description** (What is the Purchase Order: 60 character limit, but can continue to extra description. Used to identify the project or job; the material being ordered. This field is at the discretion of the requestor. Unit specific rules can be applied. **Please do not use special characters such as , ; : ’ “ - etc**)

e. **Type** (What is the type – FMS will default to MISC.)

f. **Status** (PO Status – FMS will default to OPEN)

Optional fields:

a. **Place By** (Requestor 4-digit Plant Employee Number: the person requesting the PO, not necessarily the person entering the PO)

b. Date Needed (due date)

c. Date Expected (Date the item is expected to arrive if known.)

d. Review Date (Date as a reminder to the end user.)

e. Warehouse Default (assign a Warehouse)

f. Work Order Default (assign the Work Order and Phase)

* Description field: If need be, Extra Description can be selected from the View dropdown to continue your description or for extra notes. Note that a total of 2000 characters will be used from the header description and extra description combined. Anything over will be truncated in the req loader process to MPathways.

** The Place By field must be changed to contain the requestor’s 4-digit Plant Employee Number

* Contractor Field: If Contractor number is not in FMS, contact FMS Help to enter it. Please provide the Contractor Name and Contractor Number. If the contractor number is invalid, it may have expired. Contact Karen or Lynette to request MAIS to reactivate it.

Note: In case you don’t remember what to enter in the fields, you may use the Zoom icon , which allows you to select data from a list. Remember to place the cursor in the proper field to view before clicking the icon.
4. Click view drop down and select User Defined Fields from the dropdown list.

5. Enter Purchase Order User Defined Fields information (They will be bolded).

Required fields: (highlighted by a red box)

- **Requestor ID** (Unique name of someone identified by the unit as having M1 access to MPathways to create ePro Reqs.)
- **Category Code** (Translates to Plant Building and Hardware Supplies.)
- **Work Code** (The type of work that is done)
- **Ship To** (The address that the product or item should be delivered to.)
- **Bill To** (Where the supplier should mail the invoice. This is important for back end reconciliation; invoice processing.)
- **Attention To** (The person the product/item is being delivered to.)

Optional fields:

- **Buyer ID** *(REQUIRED ONLY for all transactions equal or greater than $5,000. All orders must be authorized by an approving authority within the unit.)*
- **Address Sequence No** (If there is a need to change the order address to another MPathways address code other than the default “001”, you would make that change in this field)

Notes:
- UDFs must be entered before the Purchase Order can be saved.
- UDF will display as a Bold Text in the View Dropdown if a Purchase order has UDFs entered.
- **Zoom Icon** is available for all UDFs except for Address Sequence Number and Attention To fields.

6. Click the Done Flag to return to the purchase order screen.
7. Click on the Plus sign located on lower right in the Purchase order screen to enter supplier information.

8. Select Non-Stock.

9. Click the Next icon to go to the next screen.
10. Enter Purchase Order Line Items (The fields listed below will be **bolded**)

### Required fields: (highlighted by a red box)

- **Vendor Part** (Limited to 15 characters. If necessary, the supplier part number can begin in the description if the supplier part number is more than 15 characters.)
- **Description** (60 character limit, but can continue to extra description.)
- **Sub Ledger** (Identify item ordered as material, labor, equipment, or contract.)
- **UOM** (Unit of Measure describes how the item is ordered from the supplier. i.e. each, dozen, package.)
- **Cost** (Suppliers’ selling price based upon unit of measure.)
- **Order Quantity** (Number of units being ordered; refer to unit of measure.)

### Optional fields:

- **Shipping** (If shipping charges are known at point of order entry.)

### FYI fields:

- **Sub Total** (Once unit of measure and quantity are entered, the system will calculate this automatically.)
- **Status** (Leave as Open. Will remain open until status of purchase order is closed.)
- **Line Total** (Represents the value of the PO; the system will calculate the total automatically.)

11. Click the sequence number in the Disbursement Defaults section located at the bottom right of the Purchase Order. This where the disbursement details will be added.
12. Enter Disbursement Information. (The fields listed below will be **bolded**)

**Note:** Disbursement allows the Requestor to order the item against a Work Order and Phase; validated at the point of entry. The Work Order and Phase can be looked up by the zoom icon as well.

Required fields: (highlighted by a red box)

- **a.** Quantity (Number of items)
- **Optional fields but required:**
  - **b.** Description (What is the disbursement item)
  - **c.** Work Order (Enter Work Order to be charged. For non material use PONONBILL-YYYY)
  - **d.** Phase (Phase number or shop number the place by shop person is in)

**Note:**
If the Work Order is a Yearly, the phase should contain the shop of where the Place By shop person is in.

Only one Work Order is allowed per Purchase Order. FMS can handle more than one Work Request but will error out.

13. Click the Done Flag and it will take you back to the Purchase order Line Item screen.

14. Click the Done Flag on the Purchase Order Line Item screen to take you back to the Purchase Order Header screen.

✓ If the **Purchase Order** is less than **$5000** set the Status to **FINAL**

15. When ready to save, click the Disk icon to save the PO.

**FYI - After all fields have been populated with data, the following can occur:**

✓ If the **order is less than $5,000**, the status should be changed to **FINAL** and saved. Once an order is in finalized status you cannot edit the order.

✓ If the **order is equal to or greater than $5,000**, the status should be changed to **AUTHZD** and saved. However, the PO can be saved with a status of **OPEN**, but then must be saved again with a status of **AUTHZD** by an authorized user to be sent to MPathways for processing. These orders must contain detail from the buying staff indicating a bid has taken place or the order has been reviewed and approved by Procurement Services Facilities staff.

✓ The **Placed By** field is the person requesting the PO. All error messages will be sent to this person for correction, as well as, their supervisor and Lynette Wright.