



Onslow County Schools Purchasing Dept

**Online Purchasing Training**

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**PO Entry**

# PO ENTRY

## Entering a Purchase Order – Process Steps:

1. Type “4” for Purchasing and press “enter”

The screenshot shows a software window titled "DHORNAGES2" with a menu of functions. The window title bar includes "File Edit View Communication Actions Window Help" and a toolbar with various icons. The main content area displays the following text:

SunPac Financials Rev 6.03 FY:7 ADM:670  
2/21/07

1. Accounts Payable      5. Fixed Assets      9. Food Service  
2. General Ledger  
3. Payroll (SPEED)  
4. Purchasing            8. Budgeting

At the bottom, there is a "Select Function:" input field with a red arrow pointing to it. Below the input field are several function keys: F3=Exit, F6=NCEP, F7=About, F8=Messages, F10=CmdEntry, and F18=Printouts.

The status bar at the bottom of the window shows "MA a" on the left, "22/021" in the center, and "Xerox Doc Centre 220/230 P52 on 10.1.7.18" on the right.

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2. Type "2" and press "enter". (Note: ALWAYS use option 2 for keying in new PO's)

SunPac Financials  
2/21/07

PO Processing

- 1 PO Entry/Adj (V1)
- 2 PO Entry/Adj (V2)
- 3 PO Edit Report
- 4 Approve POs
- 5 Print POs
- 6 Cancel/Uncancel PO
- 7 Purchasing Jrnl
- 8 Hold/Release POs
- 9 Enter PO Receipts

Inquiry/Update

- 13 System File
- 14 Vendor File
- 15 PO History File
- 16 PO Comments File

Purchasing Menu

Inquiry/Lookup

- 20 GL Account Inquiry
- 21 Vendor PO Inquiry
- 22 Vendor AP Inquiry

File Sort/List

- 26 Vendor Sort/List
- 27 System File List

NCEP Functions

- 32 Username X-Reference
- 33 Vendor Name Matching
- 34 Participation Rpt
- 35 NIGP Commod. Import

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Rprts/Oth Functions

- 39 Change MBE Code
- 40 Open POs by Account
- 41 Open POs by Vendor
- 42 Opn POs/Ship-To Code
- 43 Move POs To Hist
- 44 Purge PO History
- 45 Commodity Codes Rpt
- 46 PO Status List
- 47 Recycle Codes Report
- 48 MBE Codes Report
- 49 PO Hist By Account
- 50 Multi PO Cancel
- 51 YR End Roll
- 52 POs Needing Approval
- 53 Vendor/Commodities
- 54 Vendor/Commod. Rpt

Select Function: \_

F3=Exit F6=NCEP F7=About F8=Messages F10=CmdEntry F18=Printouts

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## PO ENTRY

3. Go to “Vendor Number Lookup” for next step if you don’t know the vendor number.

4. Vendor Number:

a. Once you have selected your vendor number from the “Vendor Number Lookup” you will be brought back to this screen with your vendor number listed.

b. OR if you know the vendor number, Type the Vendor number.

SunPac Financials PO Entry/Adjust (V2) Rev 6.03 FY:7 ADM:670

Admin: 670 PO#: \_\_\_\_\_ Vendor No: 101496 Batch ID: \_\_\_\_\_

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F3=Exit F6=PO# Lookup F7=Vendor Lookup

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## PO ENTRY

5. Type the Batch ID and press “enter”.

**NOTE:** The Batch ID should consist of “Your School Code Number” + “Current Date” or “Your Initials” + “Current Date” (Example: Bell Fork Elem is code 304 and the date you are keying in the PO is 2/21/07, you would use “304022107” or by your initials “DAH022107”).

SunPac Financials PO Entry/Adjust (V2) Rev 6.03 FY:7 ADM:670

Admin: 670 PO#: \_\_\_\_\_ Vendor No: 101496 Batch ID: DAH022107

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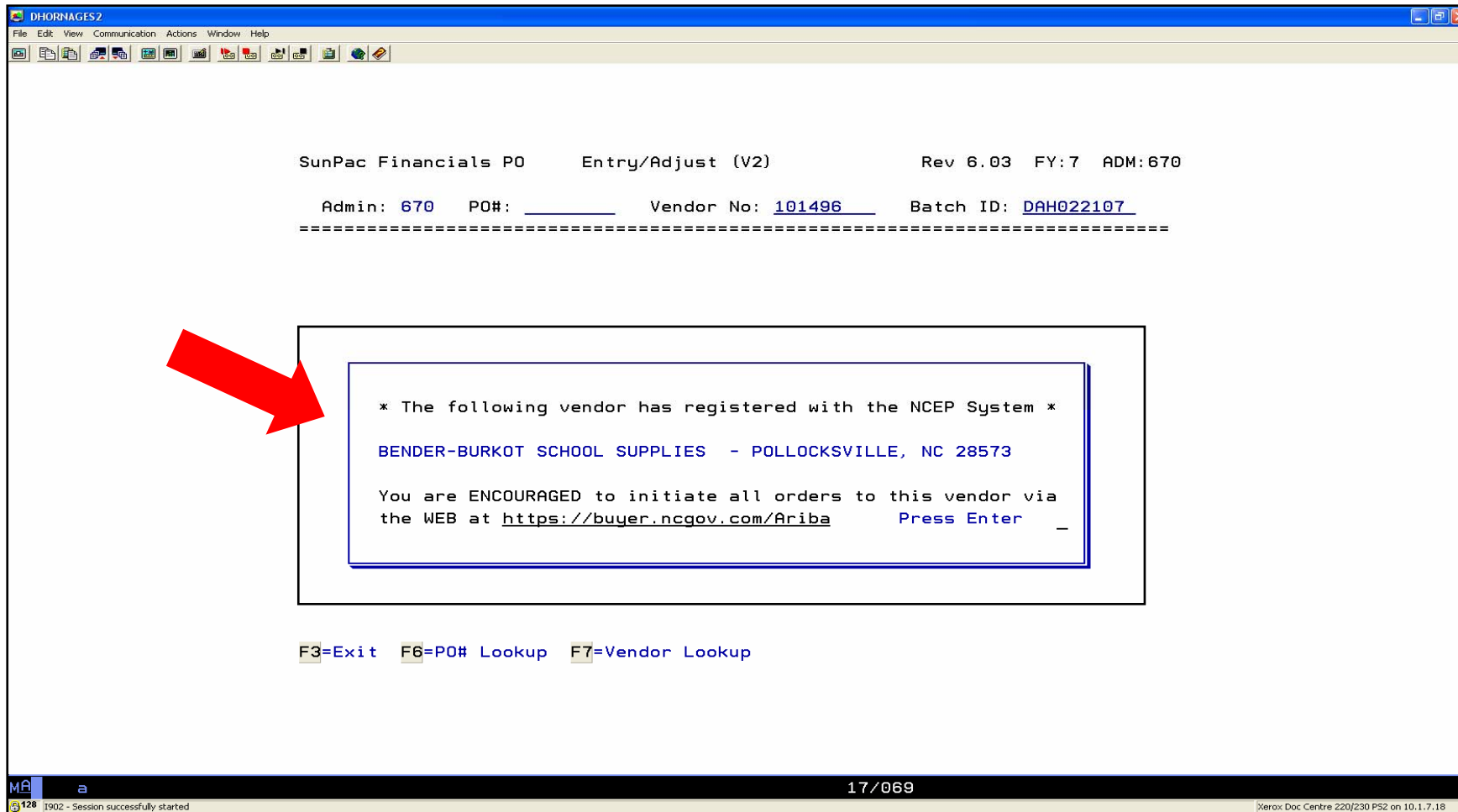
F3=Exit F6=PO# Lookup F7=Vendor Lookup

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## PO ENTRY

6. This Screen will only appear if the vendor you selected is a Registered E-Procurement Vendor.



7. Disregard this “POPUP” screen. Entry of orders through the E-Procurement Website has not been implemented in this initial phase in Onslow County Schools. Additional training will be provided prior to implementation of the next phase. Note: This popup screen will only show if the vendor is a Registered E-Procurement Vendor.

8. “Enter” to get the next screen

# PO ENTRY

9. This screen will automatically show the vendor name and your default "Deliver To" and "Ship To" information. Verify that this information is correct. Note: If the order needs to be shipped to "Fixed Assets" for tagging purposes, change the "Ship To" code to "000".

SunPac Financials PO      Entry/Adjust (V2)      Rev 6.03 FY:7 ADM:670  
Addition

Admin: 670   PO#: Auto PO#   Vendor No: 101496   Batch ID: DAH022107

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Vendor: BENDER-BURKOT SCHOOL SUPPLIES - POLLOCKSVILLE, NC 28573  
Acct: \_\_\_\_\_ Bal: \_\_\_\_\_ .00

Desc: \_\_\_\_\_      Ref# 1: \_\_\_\_\_  
Ref# 2: \_\_\_\_\_

Mdse:	_____ .00	
Tax:	_____ .00	
Frft:	_____ .00	
Disc:	_____ .00	
=====		
Total:	.00	Taxable? Y

Deliver To: DANNY SHEPARD

Ship To: ONSLOW COUNTY SCHOOLS  
820 / PO DIST CENTER / PURCHASING DEPT  
200 BROADHURST ROAD  
JACKSONVILLE, NC 28540

Bill To: 000

PO Date:	<u>22107</u>	PO Status:	ON HOLD
Deliv Date:	_____	Entered By:	DEBBIE
Expire Date:	<u>63007</u>	Amt Invd:	.00
		EP Vendor?	Y   EP PO? N

F3=Exit   F4=D/F/T   F5=Details   F6=HdrCmts   F7=LineCmts   F8=StatusFlags  
F10=FA Flags   F15=ChgVendor   F17=AcctLookup   F20=Update

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## PO ENTRY

10. **Acct:** Type “your budget code” and press “Tab Key”. (Note: You don’t have to key in the decimals as the system will automatically show the decimals)
11. **Desc:** Type “Funds or Supplies” (i.e. “Instructional Supplies”, “Instructional Funds”, etc) and press “Tab Key”

DHORNAGES2

File Edit View Communication Actions Window Help

SunPac Financials PO Entry/Adjust (V2) Rev 6.03 FY:7 ADM:670  
Addition

Admin: 670 PO#: Auto PO# Vendor No: 101496 Batch ID: DAH022107

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Vendor: ~~BENDER-BURKOT SCHOOL SUPPLIES~~ - POLLOCKSVILLE, NC 28573

Acct: 26320801412000820 Bal: .00

Desc: INSTRUCTIONAL SUPPLIES Ref# 1: X  
Ref# 2: DAH

Mdse: .00 Deliver To: DANNY SHEPARD  
Tax: .00  
Frt: .00  
Disc: .00

Total: .00 Taxable? Y Ship To: ONSLOW COUNTY SCHOOLS  
820 / PO DIST CENTER / PURCHASING DEPT  
200 BROADHURST ROAD  
JACKSONVILLE, NC 28540

Tax Percents Bill To: 000

State 4.25 PO Date: 22107 PO Status: ON HOLD  
County: 2.50 Deliv Date: \_\_\_\_\_ Entered By: DEBBIE  
Local: \_\_\_\_\_ Expire Date: 63007 Amt Invd: .00  
EP Vendor? Y EP PO? N

F3=Exit F4=D/F/T F5=Details F6=HdrCmts F7=LineCmts F8=StatusFlags  
F10=FA Flags F15=ChgVendor F17=AcctLookup F20=Update

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## PO ENTRY

- Reference #1:** Type "X" and press "Tab Key" (**NOTE:** This is a "X" required field)
- Reference #2:** Type "Your Initials" or "School # or Initials" and press "Enter"

DHORNAGES2

File Edit View Communication Actions Window Help

SunPac Financials PO Entry/Adjust (V2) Rev 6.03 FY:7 ADM:670  
Addition

Admin: 670 PO#: Auto PO# Vendor No: 101496 Batch ID: DAH022107

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Vendor: BENDER-BURKOT SCHOOL SUPPLIES - POLLOCKSVILLE, NC 28573  
Acct: 26320801412000820 Bal: \_\_\_\_\_ .00  
Desc: INSTRUCTIONAL SUPPLIES

Mdse: \_\_\_\_\_ .00 Deliver To: DANNY SHEPARD  
Tax: \_\_\_\_\_ .00  
Frt: \_\_\_\_\_ .00  
Disc: \_\_\_\_\_ .00  
=====

Total: \_\_\_\_\_ .00 Taxable? Y

Ship To: ONSLOW COUNTY SCHOOLS  
820 / PO DIST CENTER / PURCHASING DEPT  
200 BROADHURST ROAD  
JACKSONVILLE, NC 28540

Bill To: 000

Tax Percents PO Date: 22107 PO Status: ON HOLD  
State 4.25 Deliv Date: \_\_\_\_\_ Entered By: DEBBIE  
County: 2.50 Expire Date: 63007 Amt Invd: \_\_\_\_\_ .00  
Local: \_\_\_\_\_ EP Vendor? Y EP PO? N

F3=Exit F4=D/F/T F5=Details F6=HdrCmts F7=LineCmts F8=StatusFlags  
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MA b 08/063

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14. **NOTE: DO NOT** use the “F6 Key” for Header Comment, and the “F7 Key” for Line Comments on the Entry/Adjustment Screen. Registered E-Procurement vendors **DO NOT** receive any information that is keyed on these screens even though it prints out on your purchase order. ALL comments must be keyed in on the “F5” detail line screen using the “F7 Key”.

DHORNAGES2

File Edit View Communication Actions Window Help

SunPac Financials PO Entry/Adjust (V2) Rev 6.03 FY:7 ADM:670  
Addition

Admin: 670 PO#: Auto PO# Vendor No: 101496 Batch ID: DAH022107

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Vendor: BENDER-BURKOT SCHOOL SUPPLIES - POLLOCKSVILLE, NC 28573  
Acct: 2.6320.801.412.000.820.00 SUPPLIES & MATERIALS Bal: 1798.42  
Desc: INSTRUCTIONAL SUPPLIES Ref# 1: X  
Ref# 2: DAH

Mdse: .00 Deliver To: DANNY SHEPARD  
Tax: .00  
Frt: .00  
Disc: .00

=====  
Total: .00 Taxable? Y

Ship To: ONSLOW COUNTY SCHOOLS  
820 / PO DIST CENTER / PURCHASING DEPT  
200 BROADHURST ROAD  
JACKSONVILLE, NC 28540

Bill To: 000

Tax Percents  
State 4.25  
County: 2.50  
Local: \_\_\_\_\_

PO Date: 22107 PO Status: ON HOLD  
Deliv Date: 22107 Entered By: DEBBIE  
Expire Date: 63007 Amt Invd: .00  
EP Vendor? Y EP PO? N

F3=Exit F4=D/F/T F5=Details F6=HdrCmts F7=LineCmts F8=StatusFlags  
F10=FA Flags F15=ChgVendor F17=AcctLookup F20=Update

