

## How to Dispatch a Purchase Order By Fax - PeopleSoft 7.5

This documentation provides the steps necessary to dispatch a Purchase Order by Fax.

Although it is not mandatory to dispatch purchase orders by fax in PeopleSoft, here are some benefits of dispatching a PO by fax:

- Reduces processing time by eliminating the need to print and walk to the fax machine
- Reduces processing errors since the system delivers a hard copy of PO to the vendor
- The system notifies the user by email of a successful fax transmittal
- A PDF of the PO with the fax cover page is attached to the email notification
- The PDF file can be forwarded to the receiving or ordering department
- User has the option to call the vendor to confirm availability and shipment date
- And much more.....

Step 1	Select: Go, Administer Procurement, Manage Purchase Orders
Expected Results:	The Manage Purchase Orders window displays.

Step 2	Create PO, edit, budget check and approve PO using the normal procedures.
Expected Results:	The PO is ready to be dispatched.

Step 3	On PO Header Panel, click on Vendor Information button to verify if the correct fax number exists.
Expected Results:	The Vendor Details panel displays



Step 4	Click on Get Location Details button
	Get Location Details
Expected	The Location Details display
<b>Results:</b>	

۷	endor Details SUTURE EXPRESS		×
	Location: 000000001 +	Address:	OK
	Terms: NET30 +	Contact:	Cancel
	Net 30 Days	Salesperson:	
		Location Details	
	General - 01	Phone: 913/384-2220	
	11691 WEST 85TH STREET QUIVIRA BUSINESS PARK	Fax: 913/384-3730	
	LENEXA KS 66214-1515 USA		

Step 5	Verify the correct fax number displays on the Vendor Details panel. (If the correct fax number does not display, open a helpdesk ticket)
Expected Results:	The fax number is verified.



Step 6	Click OK
Expected Results:	The PO Header panel displays.

Manage Purchase Orders - Use - Purchase Order	_ 🗆 ×
<u>File Edit View Go Favorites Use Process Inquire Report Help</u>	
Lines Description 8000 Schedule Header Comments Order By Catalog Po Wrk Po Rel Display	Po Contract W
Unit: EKLMC P0/Req: 00025230	
Vendor:         SUTURE EXP-001         PO/Ref Date:         12/16/2004	
PO/Req Type: Cntrct Rel 👻 Merch Total Amt:	3339.50 USD
PO/Reg Ref: 7020 FW ENDOPOUCH Adjustment:	
Origin: ONL  On-Line En  PO/Req Total Amountt:	3339.50
Bill Addrs: EKLMC + Status Values	
Tax Exempt ID: PO/Ref Status: Approved	
Process Control Option Receipt: Not Recvd	
Hold From Further Processing     Budget Check: Valid	
Image: Print     Image: Actions       Image: Print     Image: Print	
Post Document Acctg Date: EDI	
Template: Phone Print	

Step 7	After verifying the correct fax number exists, change <b>Dispatch Method</b> from <b>Print</b> to <b>Fax</b> .
Expected Results:	The Dispatch method is changed.

Step 8	Click: Save.
Expected Results:	The changes to the PO are saved.



## How to Dispatch a Purchase Order by Fax PeopleSoft Financials 7.5 Issue Date: February 2005

Step 9	Select: Process, <b>Dispatch Purchase orders</b> , Update/Display <b>NOTE:</b> If this is the first time you are running this process, you will need to Add instead of Update/Display
Expected Results:	A dialog box displays.



Step 10	Enter or select the following Business Unit: PO ID:	HCSDA 05-609283
Expected Results:	Correct data entry.	

Step 11	Uncheck "Test Dispatch" flag if it is checked.
Expected Results:	Correct data entry.

Step 12	Click: Run
Expected Results:	Correct data entry.



Process Scheduler Request		×
Operator ID: POMORO Run C	Control ID: DISPATCH	
- Run Location	Output Destination	
C Client      Server	● File O Printer C Window	
Server: PSNT_PRD	File/Printer: C:\TEMP\	ОК
Run Date/Time:	Run Recurrence	Cancel
Date: 01/07/2005	Once 💌	
Time: 11:33:00 AM	Name:	
Reset to current Date/Time New Update Delete		
Description	Name Process Type Descr	
PO Dispatch/Print	POP0005 SQR Report	

Step 13	Run Location: Server – Select PSNT_PRD Output Destination: File/Printer: C:\TEMP\
Expected Results:	Correct data entry.

Step 14	Review the process monitor to verify if dispatch process was successful. If dispatch is successful, user should receive an email informing him/her if the fax transmittal was successful within ten minutes. Be sure to read the email. If email message indicates the fax transmittal was not successful, or if you don't receive an email within 15 minutes of dispatch, open a helpdesk ticket.
Expected Results:	The status of the process is checked in the Process Monitor.

Step 15	Return to Step 7 and change the dispatch method to print and <b>Save</b> . This will prevent accidental re-dispatching of the purchase order to the vendor.
Expected Results:	The dispatch method is changed.

## **End of Procedure**