

How to Dispatch a Purchase Order By Fax - PeopleSoft 7.5

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

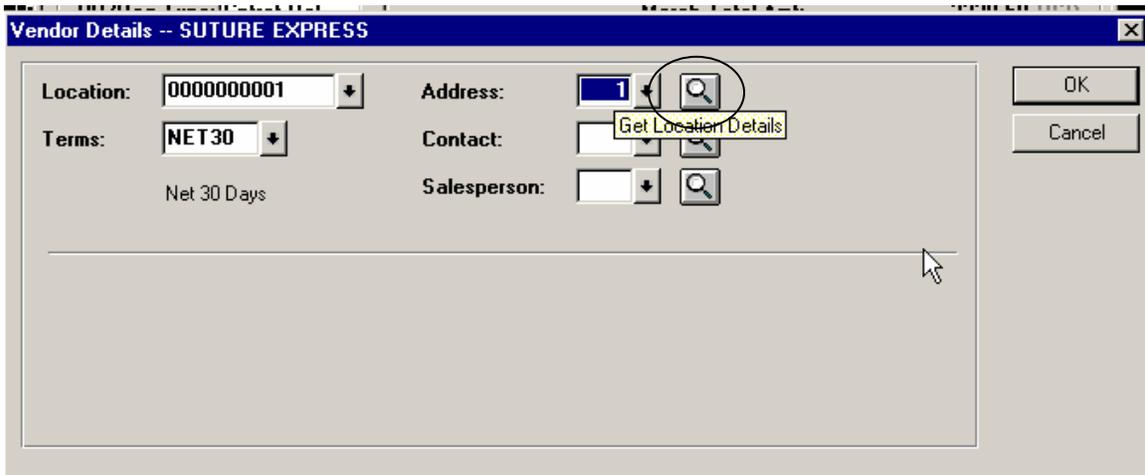
Although it is not mandatory to dispatch purchase orders by fax in PeopleSoft, here are some benefits of dispatching a PO by fax:

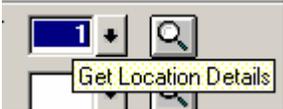
- Reduces processing time by eliminating the need to print and walk to the fax machine
- Reduces processing errors since the system delivers a hard copy of PO to the vendor
- The system notifies the user by email of a successful fax transmittal
- A PDF of the PO with the fax cover page is attached to 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



<p>Step 4</p> <p>Expected Results:</p>	<p>Click on Get Location Details button</p>  <p>The Location Details display</p>
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<p>Step 5</p> <p>Expected Results:</p>	<p>Verify the correct fax number displays on the Vendor Details panel. (If the correct fax number does not display, open a helpdesk ticket)</p> <p>The fax number is verified.</p>
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Step 6	Click OK
Expected Results:	The PO Header panel displays.

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

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

Step 9	Select: Process, Dispatch Purchase orders , Update/Display NOTE: 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: HCSDA PO ID: 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 Control ID: DISPATCH

Run Location: Client Server
 Server: PSNT_PRD

Output Destination: File Printer Window
 File/Printer: C:\TEMP\

Run Date/Time: Date: 01/07/2005 Time: 11:33:00 AM
 [Reset to current Date/Time]

Run Recurrence: Once
 Name: [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 Save . This will prevent accidental re-dispatching of the purchase order to the vendor.
Expected Results:	The dispatch method is changed.

End of Procedure