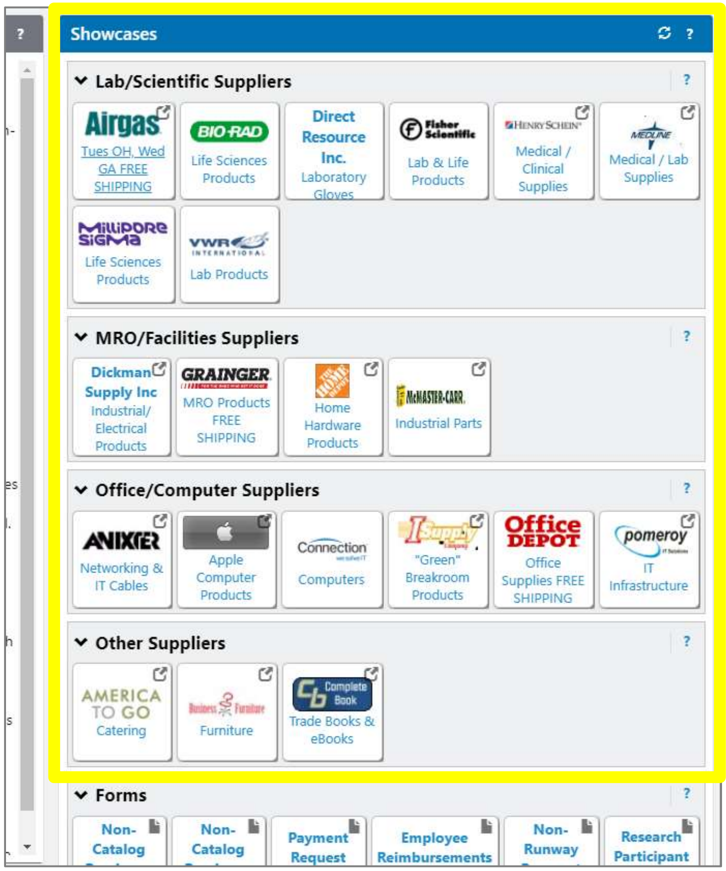
How to Create a Purchase Order (PO)

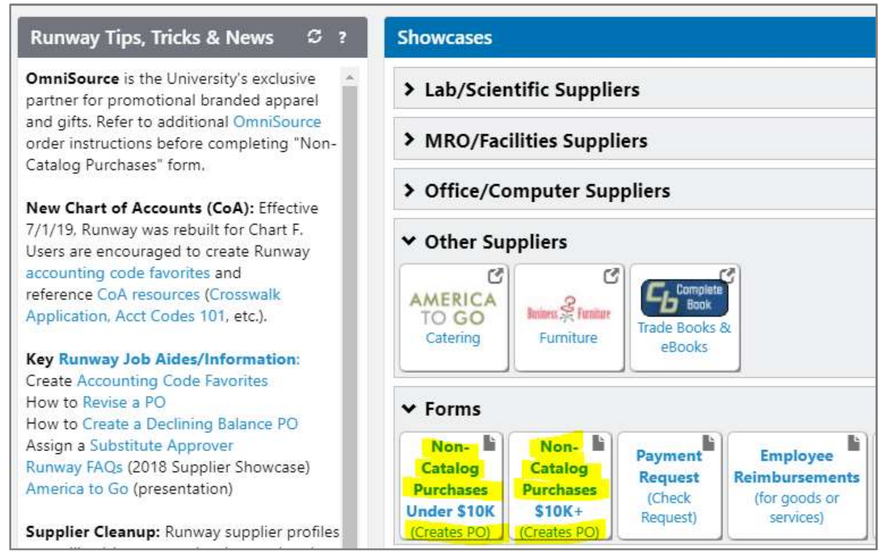
NOTE: A Runway Purchase Order (PO) is a document issued to a supplier to initiate a request for goods or services, or to confirm an order by including the supplier's quote. The PO is systematically created after the Runway Purchase Requisition (PR) is approved and completed. The PR is created when Runway users submit a cart after completing the **Non-Catalog Purchases** form or selecting goods within a Runway punch-out catalog.

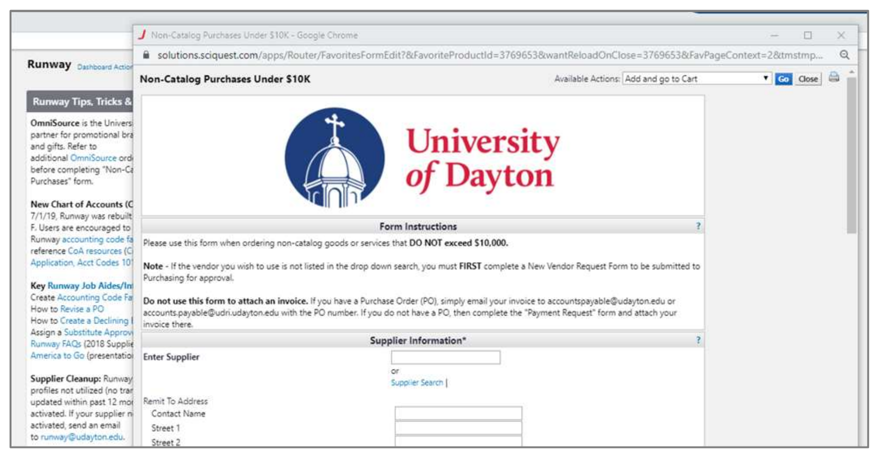
How to Create a Purchase Order

1. **Option A: Goods available in a Runway catalog.** Select a catalog icon within the Runway Showcases section, add your products in the "punch-out" catalog, and "check out" to return to Runway. This will populate your specific items in a Runway cart without the need to complete a form. Skip to step 7 to proceed with your shopping cart.

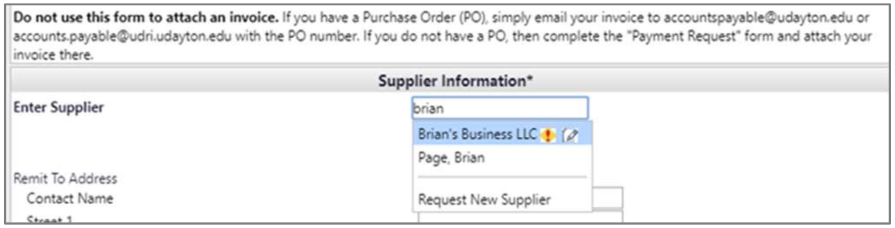


1. **Option B: Runway catalogs do not offer the required goods/services.** Open the appropriate Non-Catalog Purchases form on the Runway home shopping page under the "Forms" section. As applicable, use this form to attach a Supplier's quote for specific goods or services (required for purchases over $10K and suggested for complex, smaller purchases). **Do not use this form to attach an invoice.** (This form initiates an order; supplier payments are initiated when AP enters the PO invoice against the specific PO.)



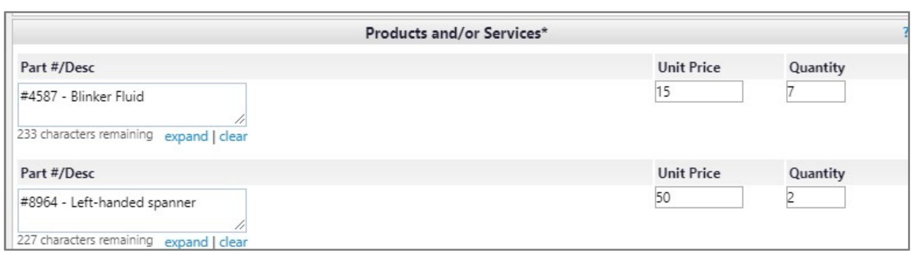


2. After opening the form, begin entering the Supplier name and select the specific Supplier from the drop down. (If your Supplier is not displayed within the drop down list, go to the Runway home shopping page and select "Request New Supplier" from the "Quick Links" section.)

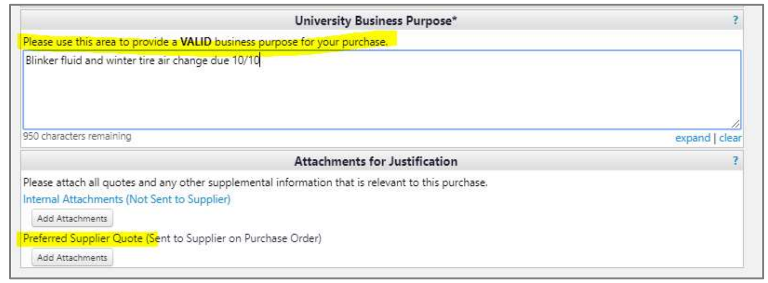


3. Confirm that the fulfillment center and distribution e-mail address are correct. (Supplier quotes typically contain this information.)

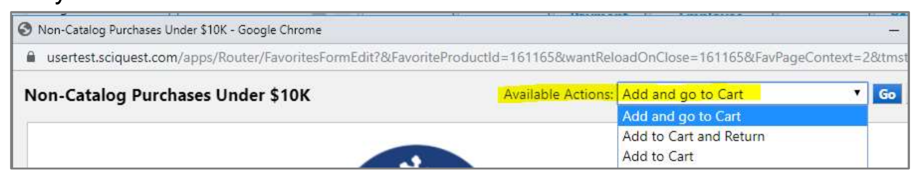
4. Fill out the Part #/Desc sections with detailed information about the goods and/or services you would like the company to provide along with the quantity and unit price. (Note: A declining balance PO is created by entering "1" as the quantity and including the entire dollar amount as the "unit price" for that line item. Then, the supplier submits small dollar invoices against the PO line item and Invoice Owner approval is required for each.)

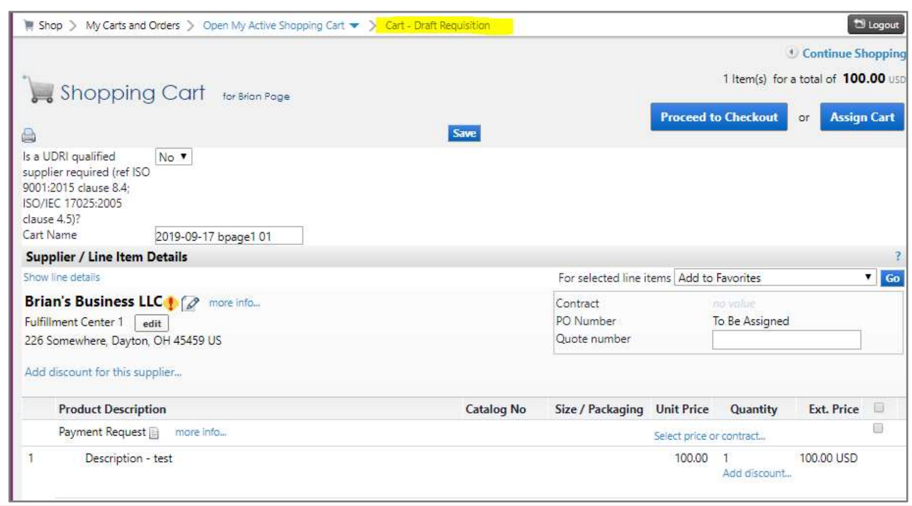


5. Complete the **University Business Purpose** section with justification for the order. The supplier's quote and any additional documentation can be included in the **Attachments** section. Documentation for internal (University) review should be uploaded under **Internal Attachments** and additional documentation for the Supplier (i.e. supplier quote, calibration specs, etc.) should be uploaded under the **Preferred Supplier Quote**, which is distributed to the supplier with the PO.

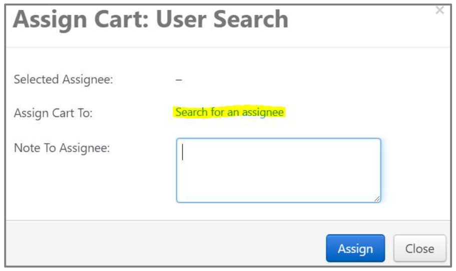


6. Scroll back to the top of the Non-Catalog Purchases form and select "Add and Go to Cart" from the dropdown and click the Go button. Then the **Cart - Draft Requisition** page will open, which provides a summary of your order items.

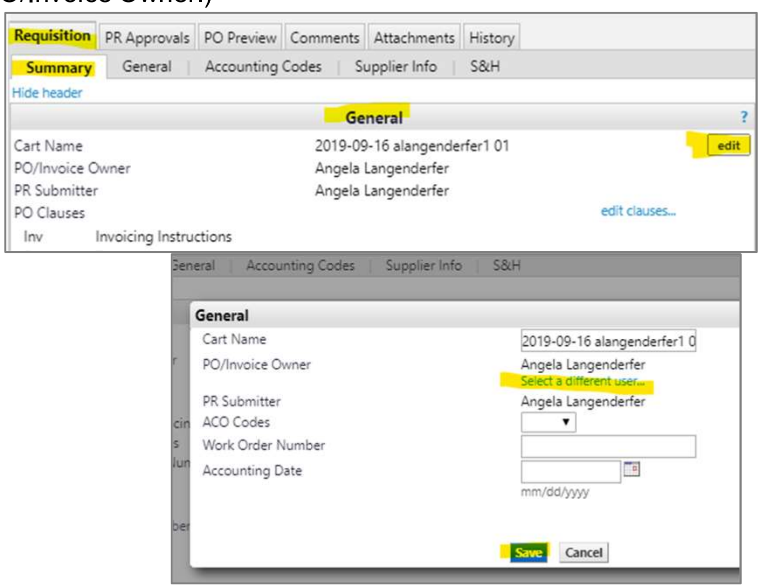




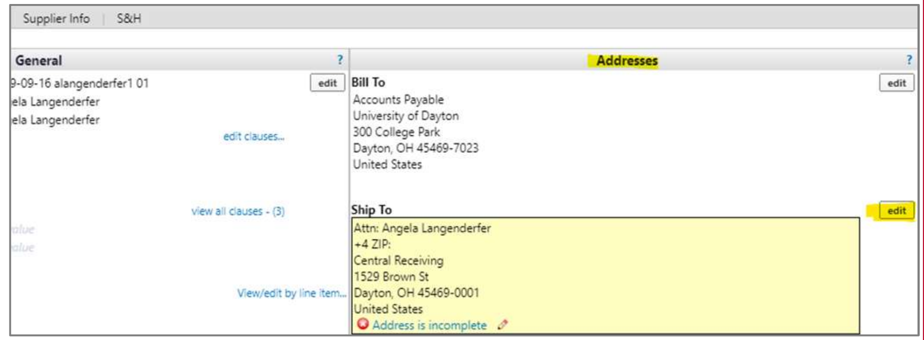
7. Next, select "Proceed to Checkout" and add the required Shopping Cart information or "Assign Cart" to another user to complete. (The Ship To address and the complete FOAPAL are required.) To assign the cart to another user, select **Assign Cart** in the upper right-hand corner and use the **Search for an assignee** link on the pop-up to search for your designated Requester by name, username, or other search criteria. You may also include a note to the Assignee.



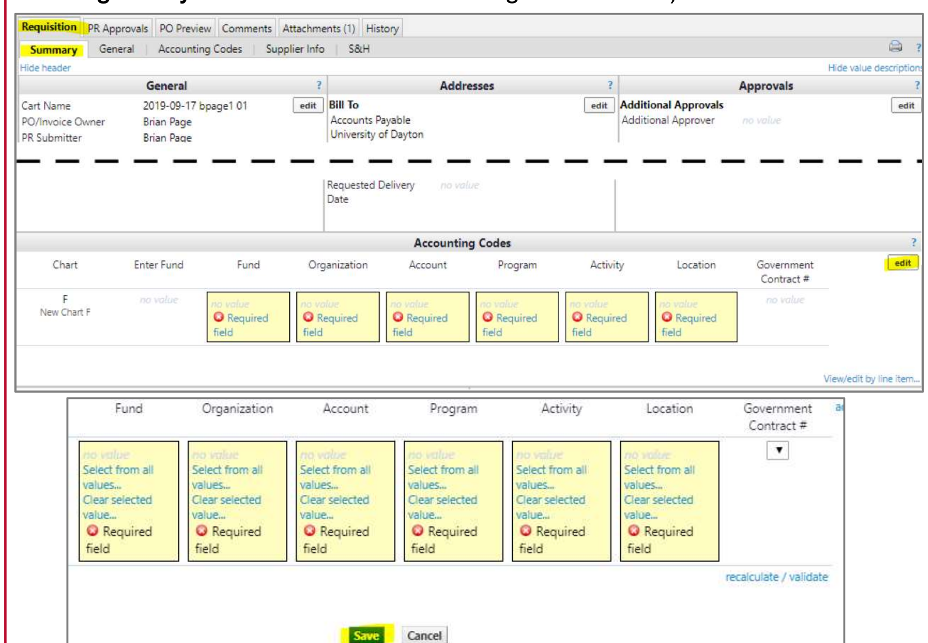
8. Additionally, the system default for the PO/Invoice Owner is the user who creates the original cart. If another user will be responsible for approving the invoices, then the PO/Invoice Owner should be changed before submitting the order. Go to **Requisition>Summary** and select **Edit** in the **General** section. Then, "**Select a different user**" and "save". (Document visibility and invoice approval routing is based on PO/Invoice Owner.)



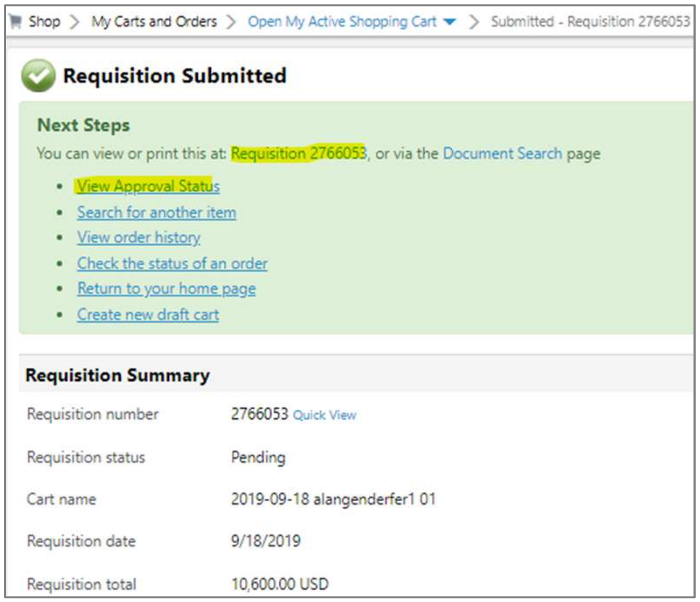
9. Next, use the **Edit** button in the **Addresses > Ship To** section to add the correct user to receive the goods and their associated +4 Zip for their campus location.

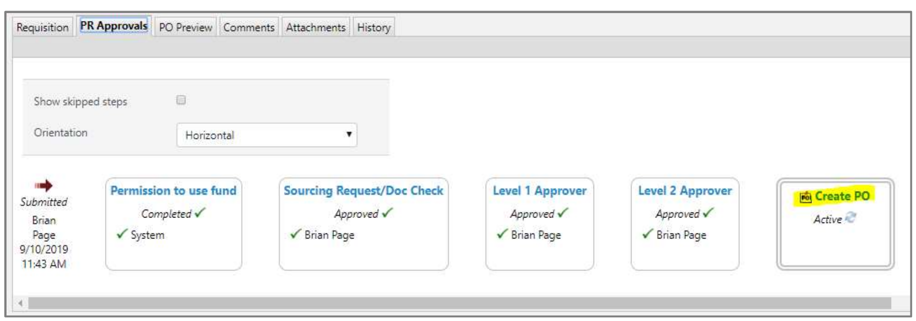


10. Finally, every order requires a complete FOAPAL (fund, org, account, program, activity, location). Go to the **Accounting Codes** section and select **Edit,** then **Select from all values** to search and select each value. (Additional FOAPAL guidance can be found at **go.udayton.edu/coa** under "Training Resources".)

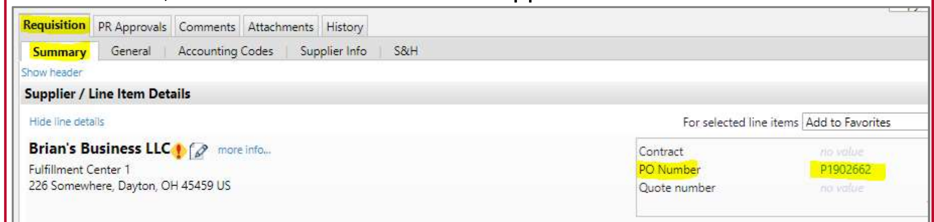


11. Finally, select the **Place Order** button in the top right of the screen to submit your order. A green confirmation screen will display a summary of the PR submitted, including a link to **View Approval Status** and the assigned requisition number. The Purchase Requisition (PR) will route according to the PR Approvals. Once all approvals are completed, Runway will systematically create the PO and distribute it to the Supplier.

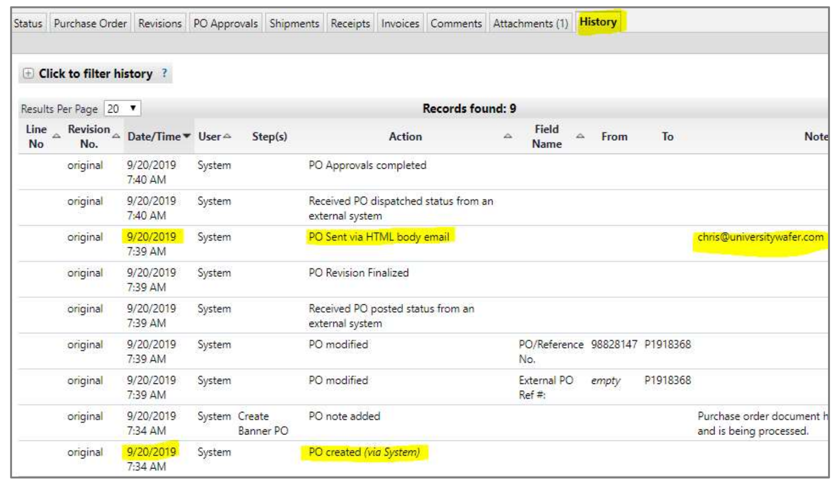




12. The PO number is listed on the PR document under the **Requisition>Summary** section and can be selected to view the PO. (Initially, Runway assigns a placeholder number until all PR workflows are completed and Banner replaces this number with the actual "**P**" number, which is distributed to the Supplier.



13. The **History** tab of the PO displays the date and time of system steps and PO updates, including the specific type (email, fax, cXML) of PO distribution.



14. The **Invoices** tab of the PO displays the applied invoices, payment status and line item status. If a user receives the PO invoice, simply scan and **email to accountspayable@udayton.edu with the PO** number so AP can apply the invoice for payment against the PO.