A Purchase Order specifies the intent to purchase goods or services from a vendor and is processed by Procurement and Supply Chain Management (referenced as Procurement). Purchase Order documents are created from approved Purchase Requisitions. Departments in Duke University Health System (Company Codes 0020 or higher) submit Purchase Requisitions either electronically in SAP or by a paper form only for standing purchase orders. Departments in Duke University (Company Code 0010) submit Purchase Requisitions through Buy@Duke.

**A Purchase Order document is:**

- Created from the **Buy@Duke shopping carts** once submitted and approved (depending on a department’s dollar threshold preference some carts may not need to be approved). Based on the goods or services purchased, some carts will need additional approval by Procurement Services or other designated areas.

- Created from an **electronic purchase requisition** done by a department. This method is used by departments that fall under the series of Health System company codes and enter requisitions directly into SAP. The changing of an electronic Purchase Requisition into a Purchase Order is done automatically by SAP if certain criteria are met, or manually by Procurement if needed.

The Purchase Order is then faxed to or electronically sent to the vendor.
## Purchase Order Types

<table>
<thead>
<tr>
<th>Type</th>
<th>Document Reference no. begins with:</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NB</td>
<td>452xxxxxxx</td>
<td>Regular or “normal business” including one time PO and SAP electronic requisitions</td>
</tr>
<tr>
<td>ECPO</td>
<td>455xxxxxxx</td>
<td>Regular one time PO – Buy@Duke</td>
</tr>
<tr>
<td>RSU</td>
<td>627xxxxxxx</td>
<td>Re-supply</td>
</tr>
<tr>
<td>SH</td>
<td>459xxxxxxx</td>
<td>Special handling</td>
</tr>
<tr>
<td>FO</td>
<td>46xxxxxxx 4605xxxxxx</td>
<td>SAP Framework / Standing Order created via a paper requisition Buy@Duke Standing Order</td>
</tr>
<tr>
<td>WOFO</td>
<td>441xxxxxxx</td>
<td>Work Order / Framework Order w/o Acct. Assignment</td>
</tr>
<tr>
<td>CFA</td>
<td>488xxxxxxx</td>
<td>Construction Framework / Standing Order</td>
</tr>
<tr>
<td>MRP</td>
<td>553xxxxxxx</td>
<td>Central inventory</td>
</tr>
<tr>
<td>PDAD</td>
<td>564xxxxxxx</td>
<td>Computer generated for cart inventory</td>
</tr>
<tr>
<td>APS</td>
<td>776xxxxxxx</td>
<td>Auto Payment Schedule</td>
</tr>
<tr>
<td>BOP</td>
<td>85xxxxxxx 8505xxxxxx</td>
<td>Bill Only / Confirming Orders (Do not ship) – used mostly for consignment items Buy@Duke Bill Only / Confirming Orders</td>
</tr>
</tbody>
</table>
Display a Purchase Order in SAP (Document Number is Known) – Transaction Code ME23

Note: For researching Buy@Duke shopping carts and Purchase Orders, see the Buy@Duke Step-by-Step User Guide or videos linked in the tool or at this link: http://finance.duke.edu/procurement/training/index.php#tr164

2. On the Display: Purchase Order Initial Screen, enter the document number in the Purchase order field.
3. Click on the Item Overview button to display the Display: Purchase Order: Item Overview screen.
4. Use the steps outlined in the guide and the buttons on the toolbar to display key pieces of information

Note: Transaction Code ME23N (not on User Menu) is an alternate way to enter a PO number and display the key fields of information using tabs in the bottom section of the screen. If using that transaction, click on the Other Purchase Order button to enter the PO number and use tabs to navigate to key pieces of information without having to open and close windows.

5. When ready, click on the Back button to exit the transaction.
Display a List of Purchase Orders in SAP (Document Number is Not Known) – Transaction Code ME2K

Note: For researching Buy@Duke shopping carts and Purchase Orders, see the Buy@Duke Step-by-Step User Guide or videos linked in the tool or at this link: http://finance.duke.edu/procurement/training/index.php#tr164

1. Via the User Menu: Purchasing → Purchasing Documents List Display → Purch. Orders: by Account Assignment

2. On the List Display of Purchase Orders screen, enter a single value or range of Cost Centers or a single value or range of WBS Elements to find a purchase order expensed to the selected cost object.

Note: Date(s) can also be used as additional criteria for narrowing a search. If these initial criteria don’t work, try removing excess criteria like Plant and/or Purchasing group. Leave BEST as scope of list.

3. Click on the Execute button to display the Purchase Orders per Account Assignment screen.

4. From the resulting list, double click on the desired Purchase Order number to display the screens for that Purchase Order.

5. When ready, click on the Back button to exit the transaction.
Display a Purchase Order from the an Invoice Document Referencing a PO

1. From the Display Invoice #: Document Overview screen, double click on the Purchase order number located in the PurchOrder field in the bottom section of the invoice document.

2. Click on the Back button to return to Item Overview screen, when ready.

To Display a Purchase Order from a Commitment on a Report

1. Double click on the commitment line item for a Purchase order.
   - If a line item for a Purchase Order contains a positive dollar amount, the Purchase Order is considered open and has NOT had a goods receipt done or an invoice processed for the Purchase Order.
   - If a line item for a Purchase Order contains a zero dollar amount, the Purchase Order is considered closed and HAS changed from a commitment to an actual line item when the Goods Receipt or Invoice document was entered into SAP.

Note: These zero dollar line items will appear on a commitment line item report from the drill-down of a summary report. The zeros can be eliminated when executing a Commitment Line Item report by clicking on the “Open items only” box on the initial selection screen before executing the report.
Example of Purchase Order Document (NB and RSU):
The examples below show the Display Purchase Order: Item Overview screens (examples = Buy@Duke electronic catalog order and a text order).

Key Pieces of Information for Each Line Item of a PO
1. The item number for reference if drilling into the document from the Commitment Line Item report or from the link in the invoice document.
2. An SAP material number populated only IF this item was ordered from materials listed in SAP (primarily used by Hospitals/Health System).
3. Either the short text description corresponding to an SAP material number OR a description of the item entered as text on the requisition.
4. The Purchase order quantity, unit of measure, and delivery date.
5. The net price for one item per unit of measure (not per quantity).
6. The Material group indicates the group to which the service or material belongs and if the cart was populated from an electronic catalog or not (EC01 = electronic catalog, others = text orders, e.g., 009 = Lab Equipment & Supplies).
Find Who Created the Purchase Order

From the Purchase Order document (*Display: Purchase Order: Item Overview* screen):

1. Click once in the **box to the left of the line item** to select.
2. Follow the menu path: **Header → Statistics → General**.

3. On the *Display Purchase Order: Header Statistics* screen, review the **Created by** field.

4. IF NEEDED, use transaction code **ZTCD** to look up the identity of a user for the User ID that is listed in the Created by field as noted below:
   - On the ZTCD screen, enter the User ID and then click on the **Execute** button. The name will be listed on the next screen.
   - The user may belong to Procurement or be the submitter/approver of a shopping cart in Buy@Duke. If WF-BATCH is listed, then no approvals were needed and the PO was created automatically.

5. Click on the **Overview** button to return to *Display Purchase Order: Item Overview* screen.
See the Purchase Order History (Goods Receipt or Invoice Documents)

From the Purchase Order document (*Display: Purchase Order: Item Overview* screen):

1. Click once in the box to the left of the line item to select.
2. Click on the PO history button.
3. On the Order History… screen, click once on any of the IR (Invoice Receipt) or GR (Goods Receipt) documents to display the accounting documents as needed.
4. Click on the Back button to return to the *Display Purchase Order: Item Overview* screen.
See the Accounts Charged, Delivery Location, and Goods Recipient

From the Purchase Order document (Display: Purchase Order: Item Overview screen):

1. Click once in the box to the left of the line item to select.
2. Click on the Account Assignments button.
3. On the Account Assignment for Item #### screen, review the fields below as needed:
   - **Cost Center** or **WBS Element** = identifies the cost object (the Duke department, area, or the Project) to be charged for these items.
   - **Unloading Point** = specific location (room number or floor) where the delivery is to be made within a building per the delivery address.
   - **Goods Recipient** = first initial and last name of person who should receive the item when delivered.

   *Note: If more than one line was selected, click on the ✓ Continue button to move to the next line’s information.*

4. Click on the ✓ Continue button to return to the Display Purchase Order: Item Overview screen.
See the Vendor Address/Phone Information
From the Purchase Order document (*Display: Purchase Order: Item Overview* screen):

1. Click once in the **box to the left of the line item** to select.
2. Follow the menu path: **Header → Vendor address**.

3. On the *Display Purchase Order: Vendor Address* screen, review the fields as needed.

4. Click on the **Overview** button to return to the *Display Purchase Order: Item Overview* screen.
View the Referencing Purchase Requisition (DUHS ONLY)
From the Purchase Order document (Display: Purchase Order: Item Overview screen):

1. Click once in the box to the left of the line item to select
2. Follow the menu path: Environment → Purchase requisition.
3. On the Display: Purchase Requisition: Item #### screen, review the fields of data needed (see Purchase Requisition section in this Guide).
4. To view the Overview screen for the requisition with all line items, click on the Overview button (different button than in a Purchase Order).
5. Click on the Back button to return to the Display Purchase Order: Item Overview screen.