How to Query a Purchase/Blanket/Change Order

Description: The Purchase/Blanket/Change Order Query Form is a query-only form, which consists of a main window and eleven additional windows. It displays documents which are completed, approved, closed, cancelled, or in process. All information attached to the purchase, blanket, or change order document defaults into the various fields and windows on this form. You also have additional navigational options on each window to view related information. **You cannot update from this form. All fields are protected.**

Form Name/Direct Access: FPIPURR

Menu: Purchasing Query Menu *FINPOQRY

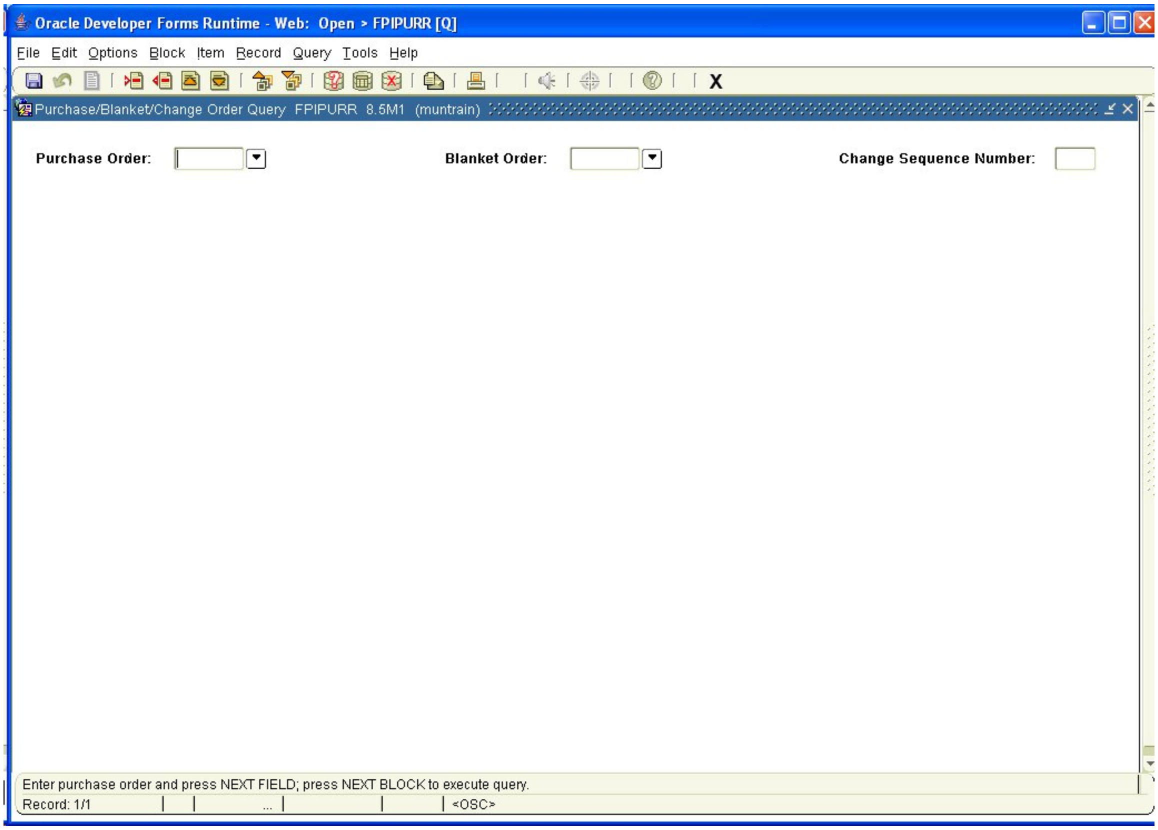
Navigation: Products Menu
- Finance System Menu
  - Purchasing and Procurement System Menu
    - Purchase Order Processing Menu
      - Purchasing Query Menu
        - Purchase/Blanket/ Change Order Query Form

General Note:

The flashlight icon provides a list of valid entries for applicable fields and fields with blue text can be double-clicked to get a list of valid entries.

Instructions:

1. Select *Purchase/Blanket/Change Order Query Form*:

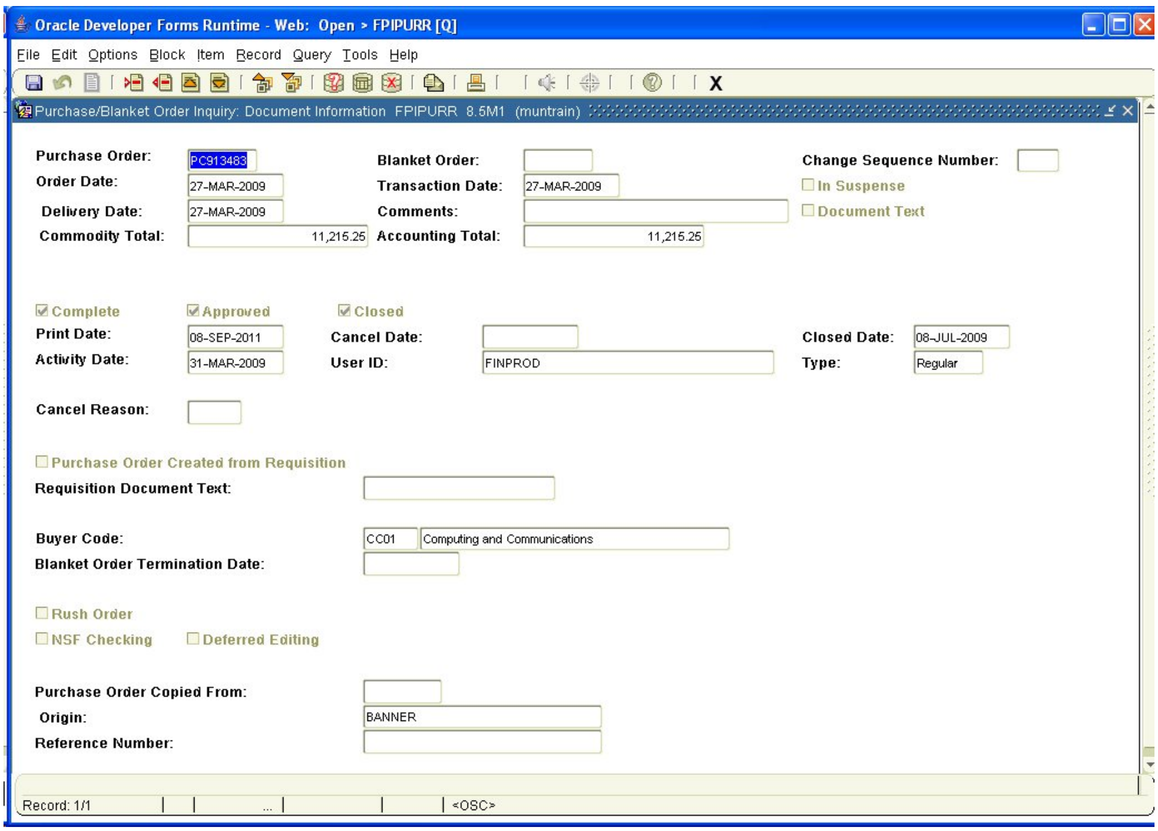


Purchase Order: If the specific purchase order (PO) number required is known, you can enter it here. If not, use the search icon (flashlight), F9 from the keyboard or *List* from the *Help* menu to initiate a query. Execute a query to see the possible POs (click the *Execute Query* button on the tool bar, F8 from the keyboard or select *Execute* from the *Query* menu). Double click to select the PO. If the PO you select is associated with a BO, the *Blanket Order* field will populate with the appropriate code.

Blanket Order: If the specific blanket order (BO) number required is known, you can enter it here. If not, use the search icon (flashlight), F9 from the keyboard or *List* from the *Help* menu to initiate a query. Execute a query to see the possible BOs (click the *Execute Query* button on the tool bar, F8 from the keyboard or select *Execute* from the *Query* menu). Double click to select the BO.

Change Seq #: Number representing the change order sequence, if applicable, of the document you want to query. To view a change order, enter this number along with the PO or BO number. Note that when you execute a query as instructed above to select a PO or BO, if you choose a change order, this field will populate based on your selection, but can be overwritten. To view the original order prior to any changes, enter a zero (0) in this field.

2. *Next Block* (use ctrl page down, the toolbar button or on the main menu, select *Block* then *Next*).



This screen shows the *Purchase/Blanket Order Inquiry: Document Information.* Since this is an inquiry form, all applicable information will populate for you based on PO, BO, change sequence number combination you selected on the first screen. The fields are display only, so are non-data enterable. Much of the information displayed here carries forward to each of the following windows. Thus the description will not be repeated.

Purchase Order: Code representing the PO.

Blanket Order: Code representing the BO.

Change Seq #: Number representing the change order sequence, if applicable.

Order Date: The date the goods/service were ordered.

Trans Date:	The date the transaction was processed and posted to the ledgers.
In Suspense:	Checkbox indicates whether the PO/BO header is in suspense.
Delivery Date:	The date the goods/service are to be delivered.
Comments:	Comments, if there were any, on the PO/BO.
Document Text:	Checkbox indicates whether text exists associated with the PO/BO.
Commodity Total:	Total amount of the commodity record on the PO/BO.
Accounting Total:	Total amount of the accounting record on the PO/BO.
Complete:	Will be checked only if the PO/BO is complete.
Approved:	Will be checked only if the PO/BO is approved.
Type:	Defines the type of PO. *Regular* indicates a regular PO. *Standing* indicates a standing PO.
Print Date:	Shows the date the PO/BO was printed if applicable.
Cancel Date:	The date the PO/BO was cancelled if applicable.
Closed Date:	The date the PO/BO was closed if applicable.
Activity Date:	The date that the PO/BO was created or last updated.
User ID:	The user id of the person that created the PO/BO or the last person to handle the PO/BO in any way.
Cancel Reason:	Shows the *Reason Code* for a cancelled PO/BO (refer to job aid for form FPAPDEL).
Purchase Order Created From Req:	Checkbox that indicates if the PO was created from a requisition. If checked, the PO was created from a requisition. If blank, it was not.
Requisition Document Text:	Will be blank.
Buyer Code:	Code and name of the buyer granted purchasing authority on the PO/BO.

Blanket Order Termination Date: Date the blanket order is no longer effective.

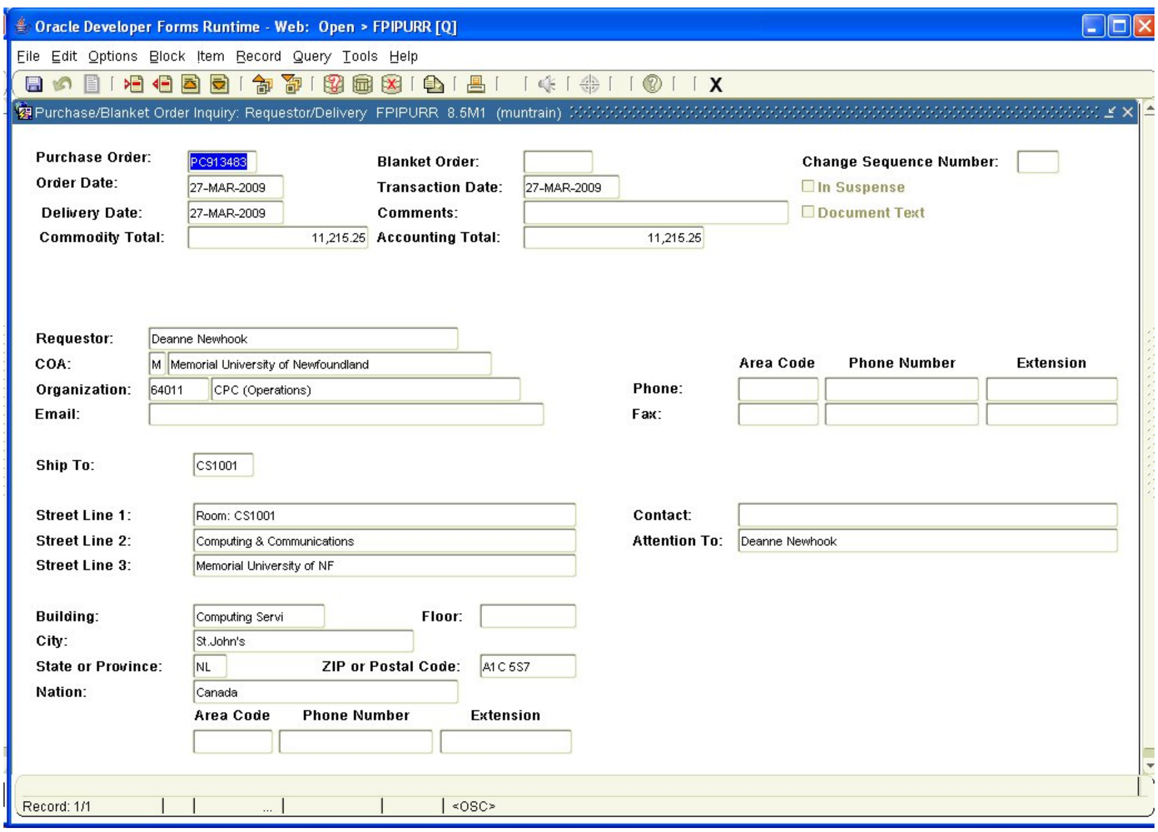
Rush Order: Not used. Will be blank.

NSF Checking: Box will be checked if NSF checking is used in the system. *NSF Checking* checks for budget availability.

Deferred Editing: Not used. Will be blank.

Purchase Order Copied From: Shows if and from which PO/BO the current PO/BO was copied.

3. *Next Block.*

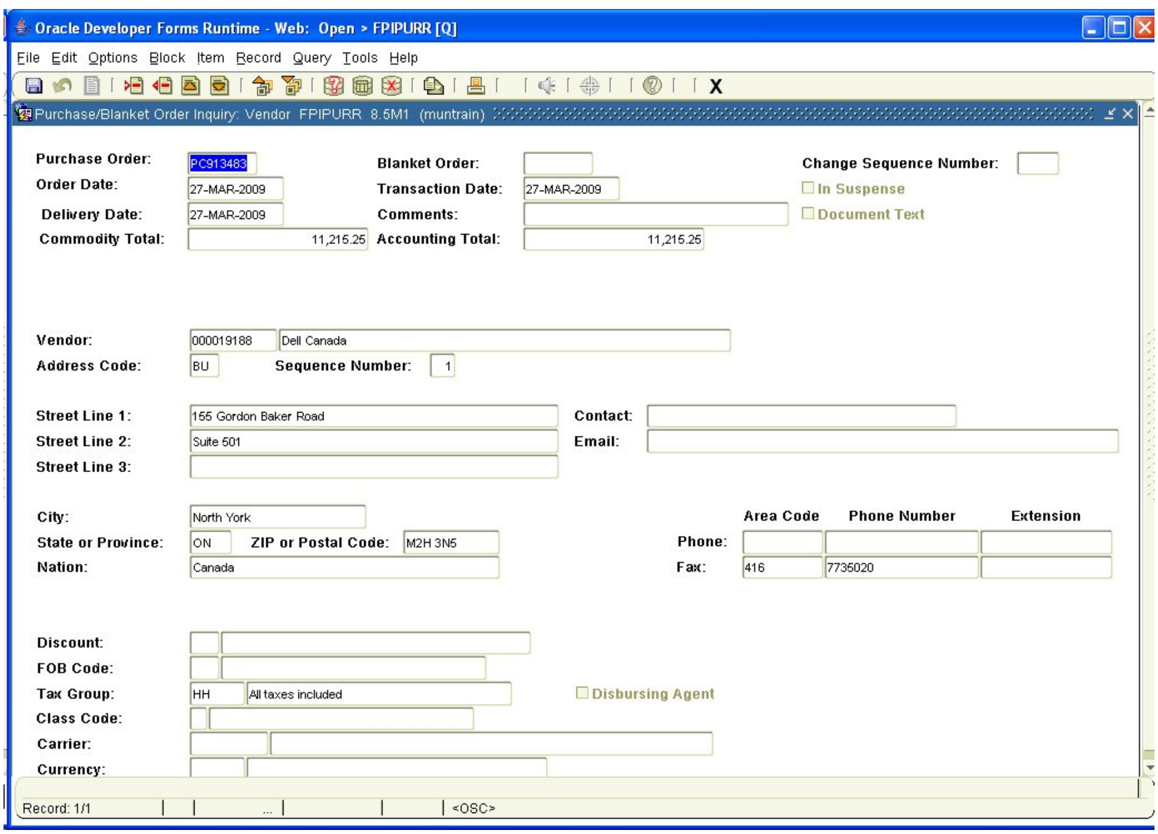


This screen shows the *Purchase/Blanket Order Inquiry: Requestor/Delivery* information that was entered when the PO/BO was originally created.

Requestor: Name of the person who entered the request.

COA:	Code representing Memorial University's chart of accounts.
Organization:	*Organization* from the COA.
Email:	Email address of the requestor.
Phone:	Phone number of the requestor.
Fax:	Fax number of the requestor.
Ship To:	Room number to which the goods are to be shipped.
Address:	Based on the *Ship To* code.
Phone:	Based on the *Ship To* code.
Contact:	Based on the *Ship To* code.
Attention To:	Name of the person to whom the goods or services are to be shipped.

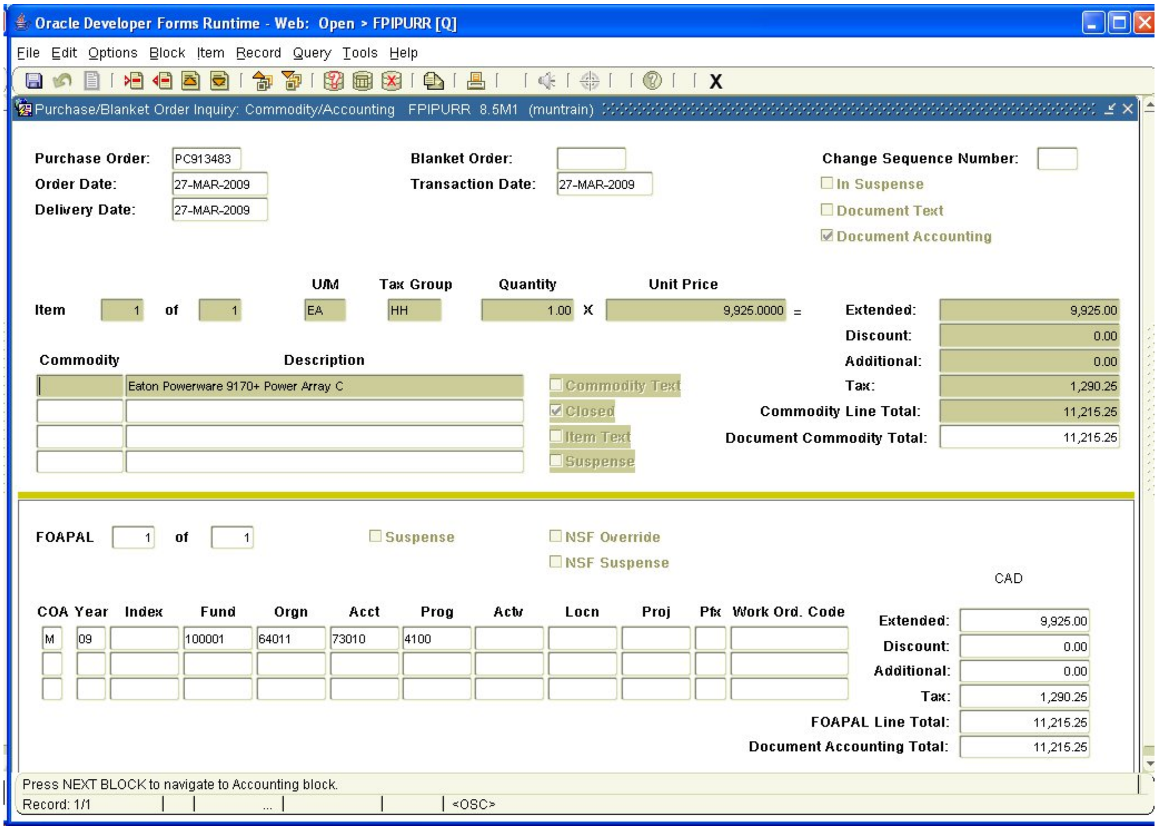
4. *Next Block*.



This screen shows the *Purchase/Blanket Order Inquiry: Vendor* information that was entered when the current PO/BO was originally created.

Vendor:	Code and name of the vendor to whom the PO/BO was issued.
Address Code:	Code representing the vendor address type.
Seq #:	Address type sequence number.
Address:	Address of the vendor.
Phone:	Area code and phone number of the vendor.
Ext:	Phone extension of the vendor.
Fax:	Fax number of the vendor.
Ext:	Fax extension of the vendor.
Contact:	Name or title of the primary contact for the vendor.
Email:	E-mail address of the contact person.
Discount:	Not used. Leave blank.
FOB Code:	Code representing the point at which the university owns the goods. In most circumstances use *FOB Destination.*
Tax Group:	Code and title of the group of tax rates that was applied to this request.
Disbursing Agent:	Not used. Leave blank.
Class Code:	Not used. Leave blank.
Carrier:	Not used. Leave blank.
Currency:	Code and description of currency used to pay the vendor invoice. There are only two options, Canadian (CDN) and US (USD). **This field is only populated for USD. If the vendor is Canadian or foreign, this field will be blank.**

5. *Next Block.*



This screen shows the *Purchase/Blanket Order Inquiry: Commodity/Accounting* information that was entered when the original PO/BO was created.

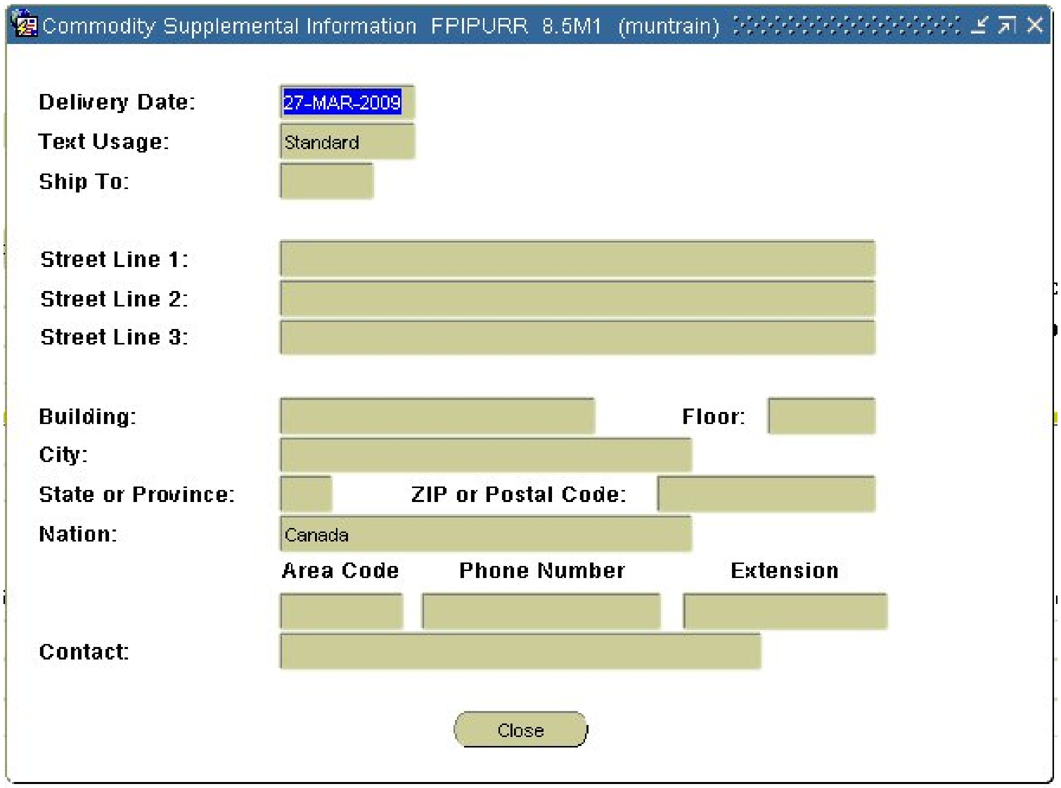
Doc Acctg:	This box defaults to a check mark.
Item:	Item number of the commodities on the PO/BO.
U/M:	Unit of Measure. This is the code representing the unit of measure of the commodity.
Tax Grp:	Code and title of the group of tax rates that was applied to this PO/BO.
Qty:	Quantity of a specific item to be ordered. Calculates with the *Unit Price* field to establish the extended cost.
Unit Price:	Price of the commodity per unit. Calculates with the *Quantity* field to establish the extended cost
Ext Cost:	Extended Cost. Total extended cost of the commodity based on the quantity multiplied by unit price.
Commodity:	Commodity codes. Not used. Will always be blank

Desc:	Description of the goods/services being purchased.
Comm Text:	Not used. Will be blank.
Closed:	Checkbox indicates whether this purchase order is closed. If selected, this purchase order is closed. If cleared, this PO/BO is open.
Item Text:	Will have a check mark indicating if text exists for the item.
In Suspense:	Checkbox indicates whether this commodity is in suspense. If selected, the commodity is in suspense. If cleared, the commodity is not in suspense.
Disc:	Not used.
Addtl:	Additional amount. This may be shipping etc.
Tax:	Tax amount based on the group of tax rates that was applied to this PO/BO.
Comm Line Total:	Total amount of the current commodity record calculated as extended cost less discount amount plus additional amount plus tax amount.
Doc Comm Total:	Total amount of all the commodities entered on the document.
BO Balance:	If this PO is referencing a BO, this field represents the total remaining balance on the BO after the PO was created. **Note that this field is visible only if this PO is assigned to a BO.**

6. Select *Commodity Supplemental Information* from the *Options* menu at the top of the screen to view any supplemental information that may have been entered. From this screen you will be able to determine if each commodity had different delivery dates and/or *Ship To* codes. Select *Close* when finished.

7. Select any of the other options from the *Options* menu at the top of the screen to review the applicable information as it was originally entered on the PO/BO.

8. *Next Block*. This will take you to the accounting information section of the record.



FOAPAL:	The code representing the specific accounting distribution and displays with the *of* field, for example, FOAPAL 1 of 2.
Suspense:	Checkbox that when checked, indicates the accounting record of the PO/BO is in suspense.
C:	Chart of accounts (COA).
Yr:	Fiscal year.
Index:	Not used. Will be blank.
Fund:	*Fund* portion of the FOAPAL from the COA.
Orgn:	*Organization* portion of the FOAPAL from the COA.
Acct:	*Account* portion of the FOAPAL from the COA.
Prog:	*Program* portion of the FOAPAL from the COA.

Actv:	*Activity* portion of the FOAPAL, if applicable, from the COA.
Locn:	*Location* portion of the FOAPAL, if applicable, from the COA.
Proj:	Not used. Will be blank.
NSF Override:	Not used. Will be blank.
NSF Suspense:	Not used. Will be blank.
Ext:	Total extended cost for the highlighted accounting distribution.
Disc:	Not used. Will be blank.
Addtl:	Total additional costs such as shipping (if applicable) for the highlighted accounting distribution.
Tax:	Total taxes for the highlighted accounting distribution.
FOAPAL Line Total:	Total amount of the current FOAPAL line record (accounting distribution) calculated as extended cost less discount amount plus additional amount plus tax amount.
Document Acctg Total:	Total amount of all accounting distributions (FOAPALs) entered on the document.

9. *Next Block*. This will take you back to the *Purchase/Blanket Order Inquiry: Document Information* screen.

10. *Exit* to leave the form or *Rollback* (use the toolbar button or select *File* from the main menu, then *Rollback*) to query on another PO/BO.