

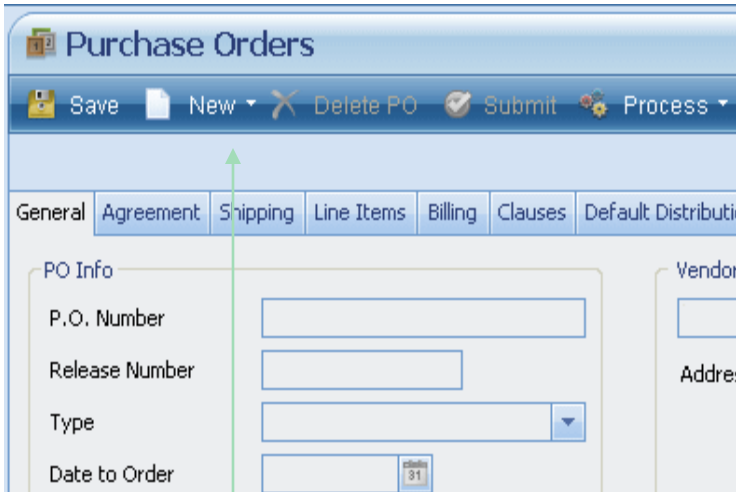
Deltek Vision® 7.x Purchasing  
Create a Standard Purchase Order  
Quick Reference Card  
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1. Select **Purchasing, Purchase Orders** from the Vision main menu. If your Vision main menu doesn't include Purchasing, please see your system administrator about your access rights.

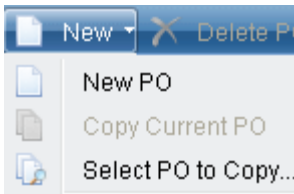


The Purchase Orders screen opens.

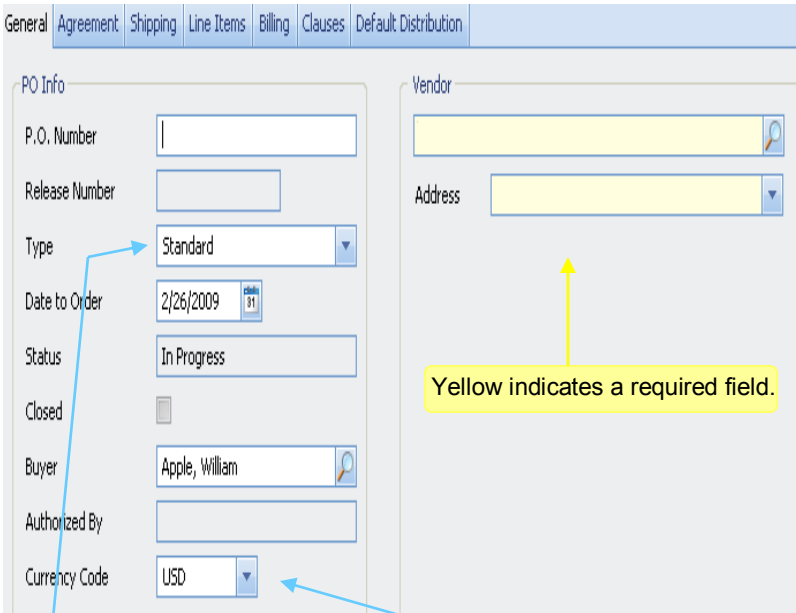
If **Require purchase orders to be approved** is selected on the General tab of **Configuration, Purchasing, Company Settings**, and you can **Approve P.O.** on the Buyer/Approver tab, the toolbar also displays these buttons:



2. Click the drop-down arrow in the **New** button.



3. Select **New PO**. Purchase Orders opens to the General Tab:

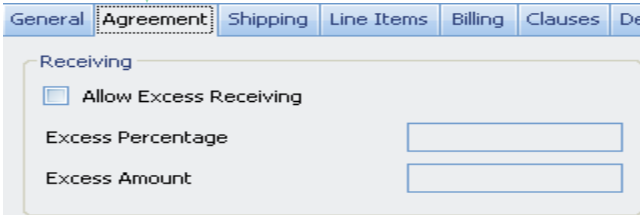


The **Type** is **Standard**.

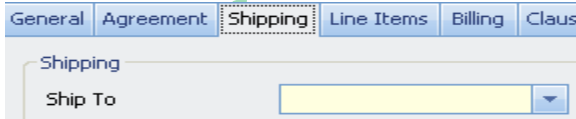
If you have the Multicurrency application, the **Currency Code** field appears. Use it to specify the purchase order's transaction currency.

This card gives you the procedure for creating a standard purchase order. To create a blanket or service order, please see the Vision online help.

4. Optional. Select the Agreement tab and complete the fields.

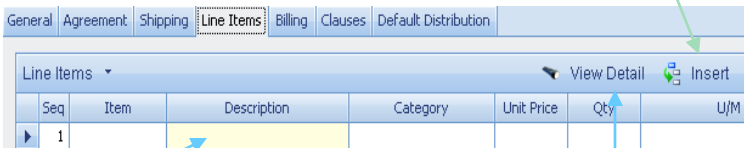


5. Select the Shipping tab and complete the fields.



- If a **Default Ship To** code is specified on the General tab of **Configuration, Purchasing, Company Settings**, it populates this field. You can accept the default or select another address.
- If the **Modify Ship-To Address** option is selected on the General tab of **Configuration, Purchasing, Company Settings**, you can select [Other] from this drop-down list and complete the address fields on this tab.

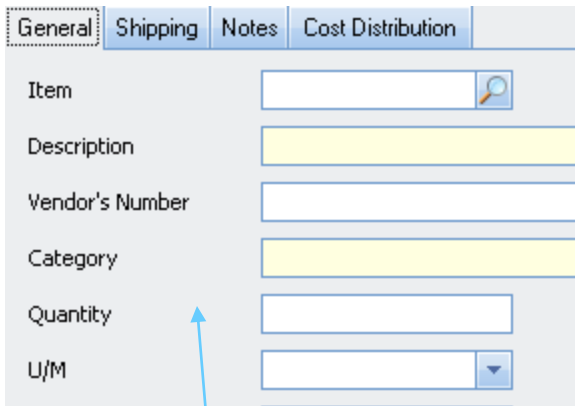
6. Select the Line Items tab, then click the **Insert** option.



When you click the **Insert** option, Vision adds a blank row and activates the **View Detail** option.

7. Complete the fields in the blank row.

8. Optional. Click the **View Detail** option to open the Line Item Detail Dialog:



Use this dialog as needed, to override a ship-to code, enter notes, and specify unit- or percentage-based cost allocation.

Continued on reverse

Deltek Vision® 7.x Purchasing  
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Quick Reference Card (cont'd)  
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If a **Default Bill To** code is specified on the General tab of **Configuration, Purchasing, Company Settings**, it appears here. You can accept the default, or specify a different **Bill To** code.

If the **Vendor** you specified in Step 4 has Pay Terms set up in the Vendor Info Center, they populate this field. You can leave this field as populated, or specify different pay terms.

9. Select the Billing tab and complete the fields:

General Agreement Shipping Line Items **Billing** Clauses Default Distribution

Bill To [Dropdown] Pay Terms [Dropdown]

10. Optional. Select the Clauses tab and complete the fields:

General Agreement Shipping Line Items **Billing** **Clauses** Default Distribution

Clause Area Top Clause [Dropdown]

11. Select the Default Distribution tab, then click the **Insert** option.

General Agreement Shipping Line Items **Billing** **Clauses** **Default Distribution**

- When you click the **Insert** option, Vision adds a blank row.
- If **Cost Distribution in P.O.** is selected on the General tab of **Configuration, Purchasing, Company Settings**, you must specify at least one project to which to charge the purchase order's line item's cost.
  - Make sure the total percentage (**PCT**) of all rows equals 100.

12. Click the **Save** button when you are through completing the Purchase Order tabs.

Save New Delete PO Submit Process

<New P.O.>

General Agreement Shipping Line Items **Billing** **Clauses** Default Distribution

- The **Delete PO** and **Submit** buttons become active.
- The purchase order's number and type appear in the context area and also, unless already entered or auto-populated, in the **P.O. Number** field:

Save New Delete PO Submit Process

**P.O. Number 4 (Standard)**

General Agreement Shipping Line Items **Billing** **Clauses** Default Distribution

PO Info

P.O. Number 4

Release Number

Type Standard [Dropdown]

Vendor Feder.

Address

13. Click the **Submit** button to submit the purchase order for approval.

14. Select **Print, Print Current PO** to open the Print Options dialog:

General **Layout**

Report Name Purchase Order

Clauses

☐ Print Top Clause ☐ Print Description

☐ Print Bottom Clause

Purchase Order Type

Select Type to Print Standard [Dropdown]

Purchase Order Version

☒ Draft

☐ Final (Mark as Printed)

☐ Reprint

In the dialog, select from these options:

**Draft** - Print out the purchase order before it is approved.

**Final (Mark as Printed)** - Approval of the purchase order enables this option. Select it to "final print" the purchase order. Then, when you click **Run**, Vision creates a committed expense for each line item and changes the purchase order's **Status** to Printed.

**Reprint** - Print the final purchase order any time after it is approved, without affecting its status or committed expenses.