Dispatch Purchase Orders by Batch

Quick Tip: Dispatch Purchase Order by Batch

Currently users dispatch Purchase Orders one at a time. This can take from 3-5 minutes per Purchase Order. If a User dispatches 50 in a given day they would spend between 2.5 – 4 hours a day on dispatching Purchase Orders alone.

PeopleSoft offers users the ability to dispatch Purchase Orders in Batches. In the time it takes a user to dispatch one Purchase Order they could dispatch 50, saving between 2-3.5 hours a day.

Navigation:

Purchasing>Purchase Orders>Reconcile Pos>Reconciliation Workbench

Reconciliation WorkBench

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Business Unit: 58000

WorkBench ID: begins with

Description: begins with

Case Sensitive

Search  Clear  Basic Search  Save Search Criteria

Find an Existing Value  Add a New Value

Input the Workbench ID and click the Search button.
Input your Buyer ID and click the Approved Radio box located in the Status section.
Dispatch Purchase Orders by Batch

Click the button.

Click the link to review all eligible Purchase Orders.
Dispatch Purchase Orders by Batch

- You can deselect a Purchase Order from being dispatched by clicking the Radio Box located to the left of the Purchase Order number.

Click the tab.

- The Budget Status must equal Valid or you need to deselect the Purchase Order.

- You can go to the Maintain Purchase Order by clicking the icon located to the far right of the Purchase Order number

When you are ready to dispatch the Purchase Order click the button at the bottom of the page.
Dispatch Purchase Orders by Batch

Reconciliation WorkBench

Processing Results

Business Unit: 58000  WorkBench ID: DISPATCHPO
Description: DISPATCH PURCHASE ORDERS

Select PO's for Further Processing

Not Qualified | View All | Qualified | Flat | View All | Download | 1 of 20

<table>
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Select All □ Clear All

Proceed □ Yes □ No

This will take you to the Processing Results page. There are two sections:

- **Not Qualified**
  - You can identify the reason the Purchase Order is not qualified to be dispatched by clicking the icon located to the right of the Purchase Order not qualified.

- **Qualified**
  - Identifies the Purchase Orders that are qualified to be dispatched.
  - Click the button to the right of the Purchase Order if you do not want to dispatch it.
  - Be sure to click the link to review all Purchase Orders Qualified to be dispatched.

When ready click the □ Yes □ button to continue with dispatching the Purchase Order.
Dispatch Purchase Orders by Batch

Continue to Dispatch POs. (10224,41)

Yes  No

Click the **Yes** button to continue, click the **No** button to return back to the previous page without dispatching the Purchase Orders.

Reconciliation WorkBench

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<th>PO Status</th>
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<th>Last Activity</th>
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Select All  Clear All

Action: Approve  Unapprove  Cancel  Close  Dispatch  Previous
Dispatch Purchase Orders by Batch

Print Purchase Orders Dispatched

Navigation:

People Tools>Process Schedule>Process Monitor

Click on the PODISP link.
Dispatch Purchase Orders by Batch

Process Detail

Process Name: PODISP
Main Job Instance: 3728821

Left | Right

- 3728821 - PODISP Success
- 3728822 - POPO0005 Success
- 3728823 - PO PO_EMAIL Success

Click on the middle link.
Dispatch Purchase Orders by Batch

Process Detail

Process

Instance: 3728622
Name: POPC005
Run Status: Success
Distribution Status: Posted

Type: SQR Process
Description: Single PO Dispatch/Print

Run

Run Control ID: RMAXWELL
Location: Server
Server:
Recurrence:

Update Process

- Hold Request
- Queue Request
- Cancel Request
- Delete Request
- Restart Request

Date/Time

Request Created On: 12/04/2006 10:47:33AM CST
Run Anytime After: 12/04/2006 10:47:30AM CST
Began Process At: 12/04/2006 10:47:51AM CST

Actions

- Parameters
- Transfer
- Message Loc
- Batch Timings
- View Log/Trace

OK Cancel

Click on the View Log/Trace link.
Dispatch Purchase Orders by Batch

Click on the PDF link. This link will show all the purchase orders that have been selected to dispatch.