

Additional POR Creation Features

This page contains information that is helpful to know about creating POR from a template, saving a draft POR, and editing POR items.


Edit POR Items

If you need to edit a POR item that you've added simple click the item box with the item title or click the Purchase button

1 x Dell Keyboard Ship To: SRSC This is a basic black dell keyboard Part #2342343	PER ITEM \$10.00	TOTAL \$10.00	 Purchase
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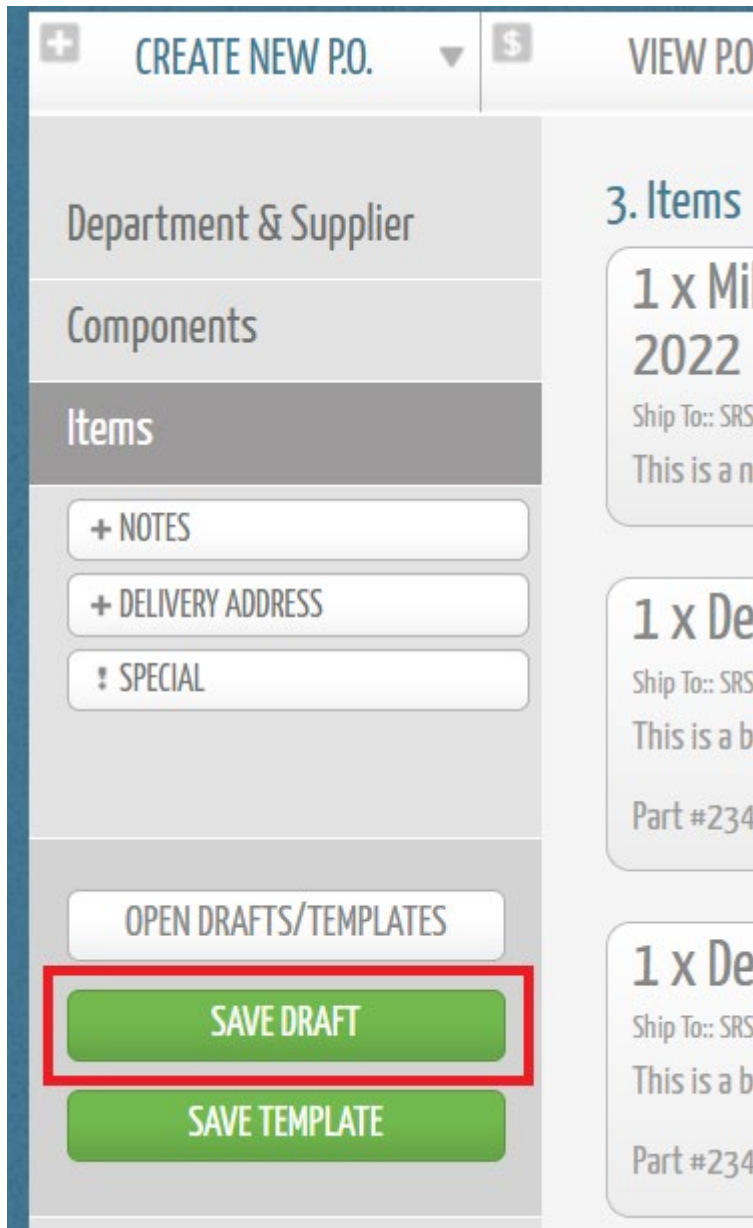
Deleting POR Items

If you need to delete an item, simply click the trash can icon on the item

1 x Dell Keyboard Ship To: SRSC This is a basic black dell keyboard Part #2342343	PER ITEM \$10.00	TOTAL \$10.00	 Purchase
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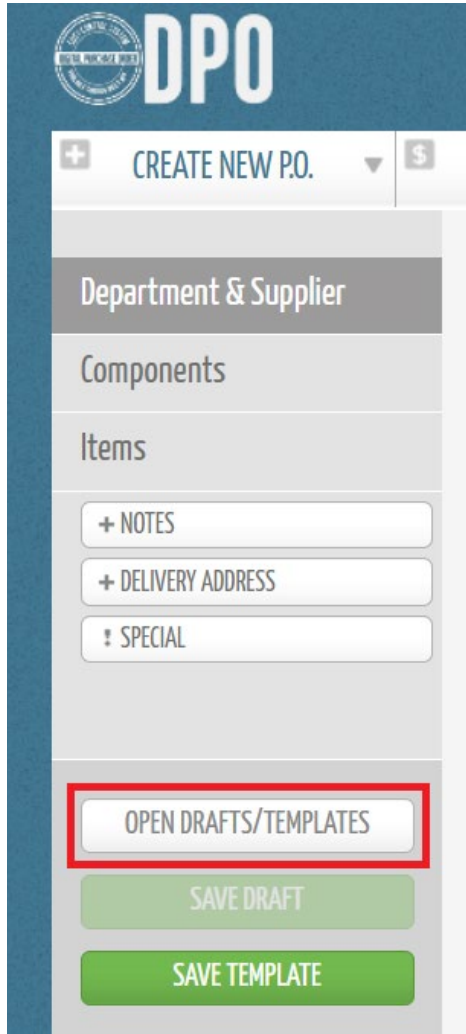
Saving a POR Draft

If you are working on a POR and want to save it to finish later, simply click **Save Draft** on the left side bar. Give the draft a name and description and click **Save**. The POR will now say **Draft Mode Active** under Save Template on the left. You can then click **View P.O.'S** or close the page navigate away from the draft. You'll receive a warning but you can ignore this. **Don't click Finish Draft or it will submit the POR.**




Retrieving a POR Draft

To open a previously saved draft POR click **CREATE NEW P.O.** at the top of the screen and then click **Open Drafts / Templates** in the bottom of the left sidebar.



Your list of saved drafts will appear where you can click **Open Draft** on the POR you'd like to complete.

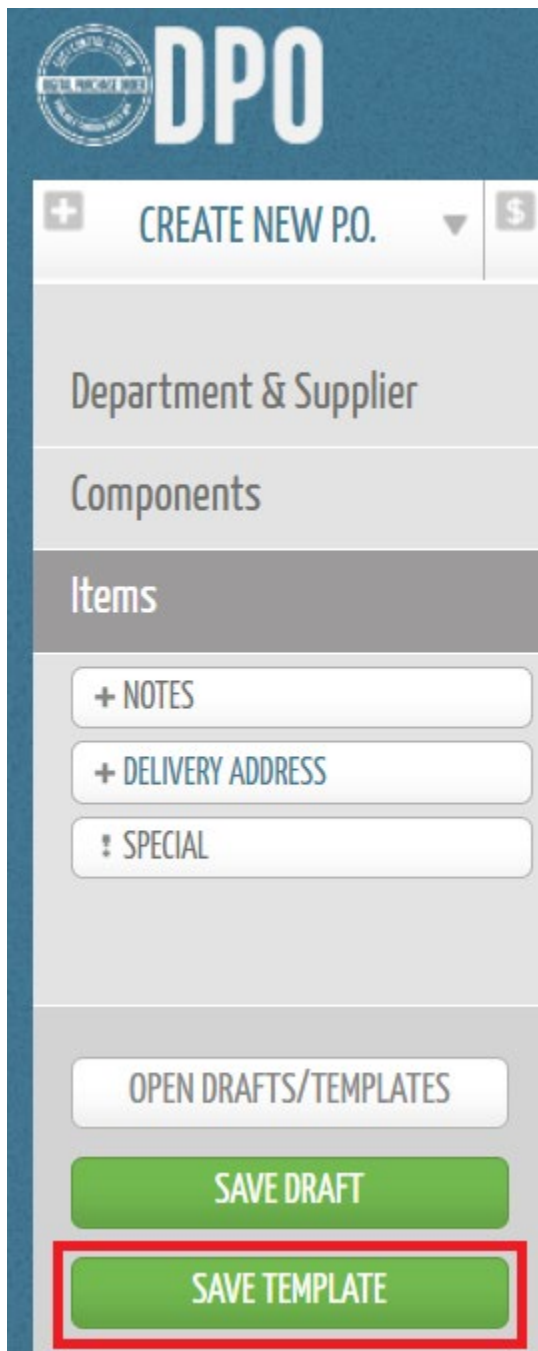
MANAGE DRAFTS & TEMPLATES		
Name	Last Saved	
RSFC Office Computer	6/27/2022 4:39 PM	↔ OPEN DRAFT 

1 Drafts

Click **Finish Draft** in the bottom right when you are completely done with the POR.

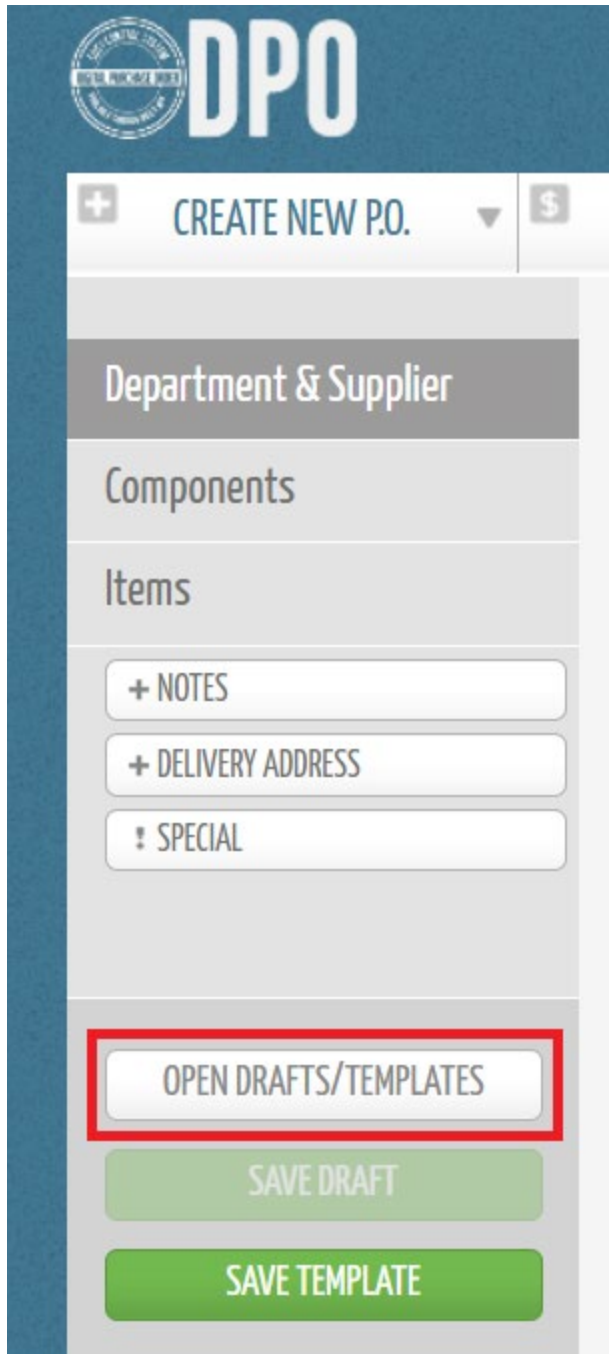
Saving a POR as a Template

The POR system has the ability to create template PORs for use in the future. This is nice if you purchase something frequently and don't want to recreate a POR from scratch often. Simply create your POR with all of the items you'd like in the template and then click **Save Template** in the lower left hand sidebar. Enter a Template Name and description and click **Save**. You can click back to **View POs** or close the page. You'll receive a warning but you can ignore this.



Create a POR From a Template

To create a POR from a template simply click **CREATE NEW P.O.** in the top left of the POR System. Then click **Open Drafts / Templates** in the left side bar.



The screenshot shows the DPO system interface. At the top left, there is a circular logo with the text 'DPO' next to it. Below the logo, there is a button labeled 'CREATE NEW P.O.' with a plus sign on the left and a dollar sign on the right. Below this button, there are several sections: 'Department & Supplier', 'Components', and 'Items'. Under the 'Items' section, there are three buttons: '+ NOTES', '+ DELIVERY ADDRESS', and '! SPECIAL'. At the bottom of the interface, there are three buttons: 'OPEN DRAFTS/TEMPLATES' (highlighted with a red box), 'SAVE DRAFT', and 'SAVE TEMPLATE'.

You'll then see your list of drafts and templates. Click **Open Template** to retrieve your template POR. Edit as needed and submit.

Create a Copy of a POR From an Existing POR

At some time you may want to create a POR from an existing POR in the system so you don't have to reenter all of the information or to use it as a template shortcut. Simply go to **VIEW P.O.'s** section and find the POR you want to copy. Click the **copy icon** in the top right of the POR listing (if you hover it says "Create a new Purchase Order based on this one"). It will take you to the POR and you can now edit this copy and submit it with less work than creating it from scratch.

