



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Adding a Shipping Line to a Purchase Order

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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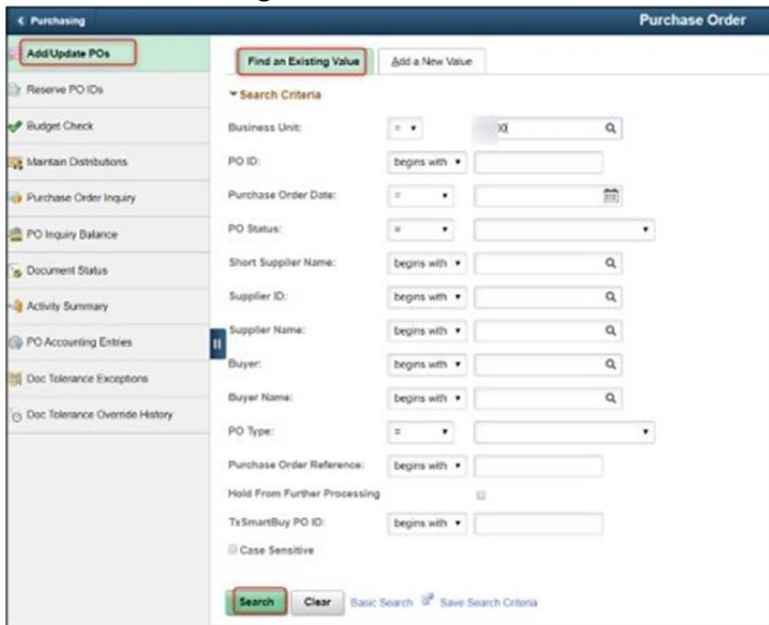
Adding a Shipping Line to a Purchase Order

Navigation

Dashboard: Purchasing; **Tile:** Purchase Order

From the **Purchase Order** tile:

1. Select **Add/Update POs** in the left-hand menu.
2. Select **Find an Existing Value** tab.



3. Enter **Search Criteria** to find the PO that needs an additional line for shipping cost.
4. Select **Search**.
5. Select the plus sign (+) at the end of the PO Line to add a new row.

Line	Item	Description	PO Qty *UOM	Price	Merchandise Amount	Status			
1		Desk	1.0000 EA	150.00000	150.00	Approved			+

6. Enter the number of rows that need to be added.

Enter number of rows to add:

OK
Cancel

7. Select **OK**.

Note: If the PO was in *Dispatched* status, a message displays warning that this action will create a change order.

Message

This action will create a change order. (10250,178)

This PO has been dispatched, add/delete/change a line or schedule will create a change order.

OK

Select **OK** to continue.

- Enter values (in the new line) for the DESCRIPTION, PO QTY, UOM, and PRICE fields.

Line	Item	Description	PO Qty	*UOM	Price	Merchandise Amount	Status
1		Desk	1.0000	EA	150.00000	150.00	Approved
2		Shipping	1.0000	ea	40	0.00	Approved

- Select the **Class/Item** tab.

Line	Item	Description	*NIGP Class	NIGP Item	Purchasing Method	Purchasing Category Code
1		Desk	005	05	DG	E
2		Shipping	005	05	DG	E

- Enter the same NIGP CLASS and NIGP ITEM that was used for the item being shipped.

- Select **Attributes** tab.

Line	Item	Description	Physical Nature	*Price Qty	*Price Date	Amount Only	Unit Allocation Amt
1		Desk	Goods	Schedu	PO	<input type="checkbox"/>	
2		Shipping	Goods	Schedu	PO	<input checked="" type="checkbox"/>	

- Select the AMOUNT ONLY checkbox.

A message displays to confirm a quantity and the choice of AMOUNT ONLY.

Message

The PO Qty will be 1 for an amount only line, the system will reprice the PO line. Continue? (10200,273)

The PO Qty will be 1 for an amount only PO line, the system will reprice the PO line for you.

Note: If the actual shipping costs are less than expected, the AMOUNT ONLY designation allows the price to be adjusted in receiving.

- Select **Yes**.

- Select the **Details** tab.

- Select the calendar icon (on the right side of the shipping line) to schedule the shipment.

Line	Item	Description	PO Qty	*UOM	Price	Merchandise Amount	Status
1		Desk	1.0000	EA	150.00000	150.00	Approved
2		Shipping	1.0000	EA	40.00000	40.00	Approved

- Select the Distribution/ChartField icon (third icon from the right).

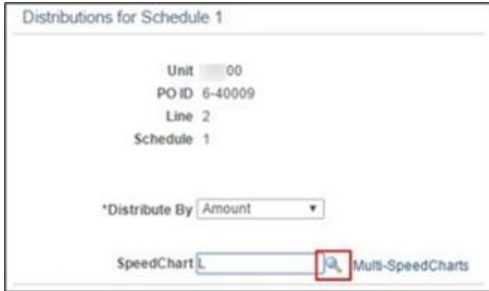
Sched	*Due Date	*Ship To	*PO Qty	Price	Merchandise Amount	Status
1	03/22/2016	458-002	1.0000	40.00000	40.00	Active

17. Populate ChartField elements manually.

Note: To find which budget was used for the item being shipped, navigate to that PO Line's distribution and get the ChartField elements. You **must** use the same *Account* code that was used for the item being shipped.

–OR–

Select the **SpeedChart** search icon (magnifying glass).

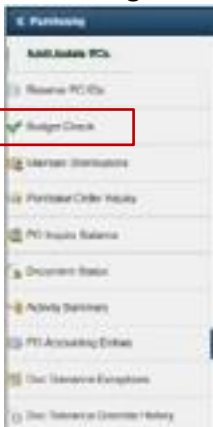


Note: You can leave the screen blank or enter a few characters to narrow the search.

18. Select the **SpeedChart**.



19. Add the **same** *Account* code that was used for the item being shipped
20. Enter any other required ChartField elements not populated by the SpeedChart.
21. Select **OK**.
22. Select **Return to Main Page**.
23. **Save** the purchase order.
24. **Approve** the purchase order.
25. Run a **Budget Check** on the purchase order.



26. **Dispatch** the purchase order.

Revision History

Date	Description of Change	Changed By
Dec. 9, 2024	Initial release.	J. Goodman