

Create Purchase Order from Requisition – Add Special Terms

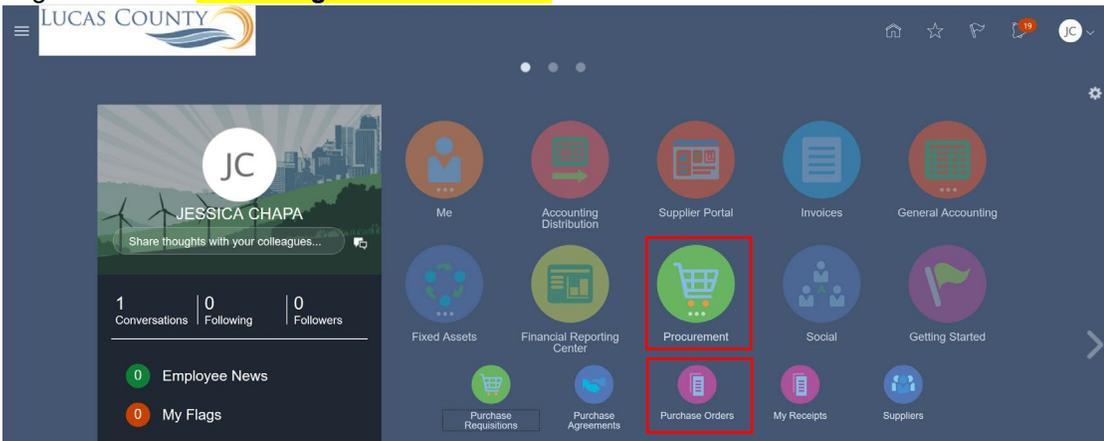
Audience: Purchasing

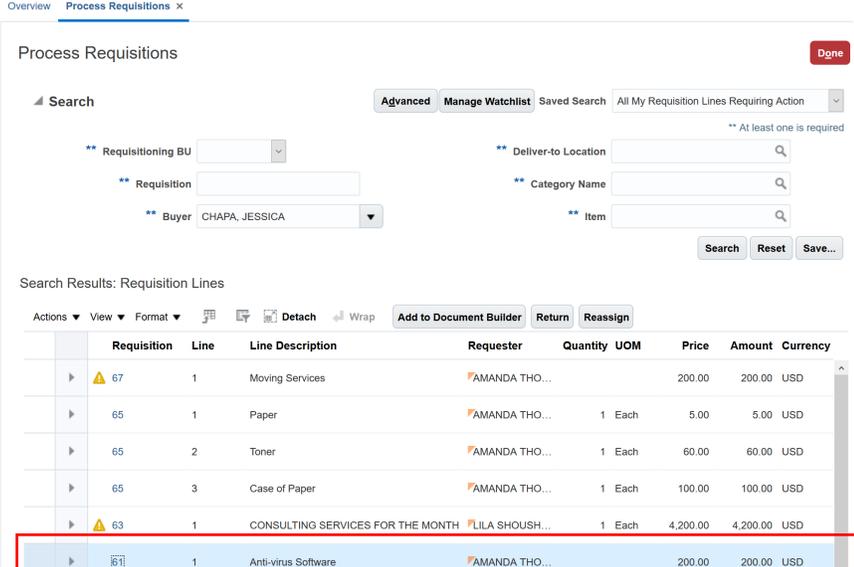
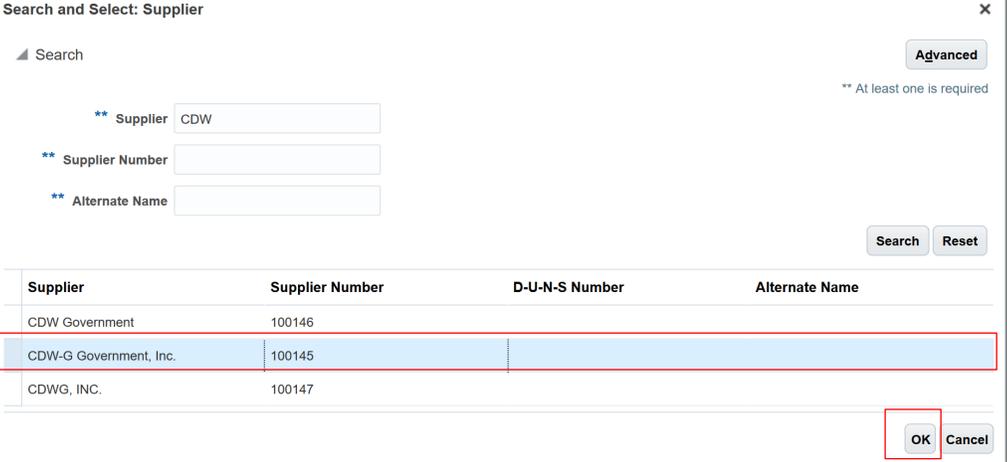
Purpose: You can create contract terms templates in the Contract Terms Library to insert appropriate terms and conditions into contracts during contract authoring. You can apply the templates manually while authoring contracts or the application can apply the templates automatically using defaulting rules you set up.

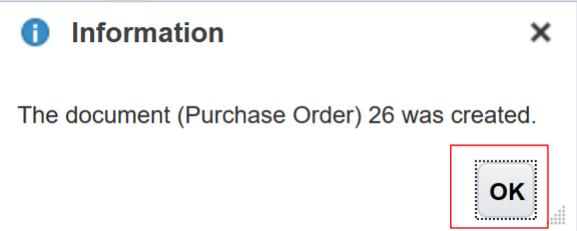
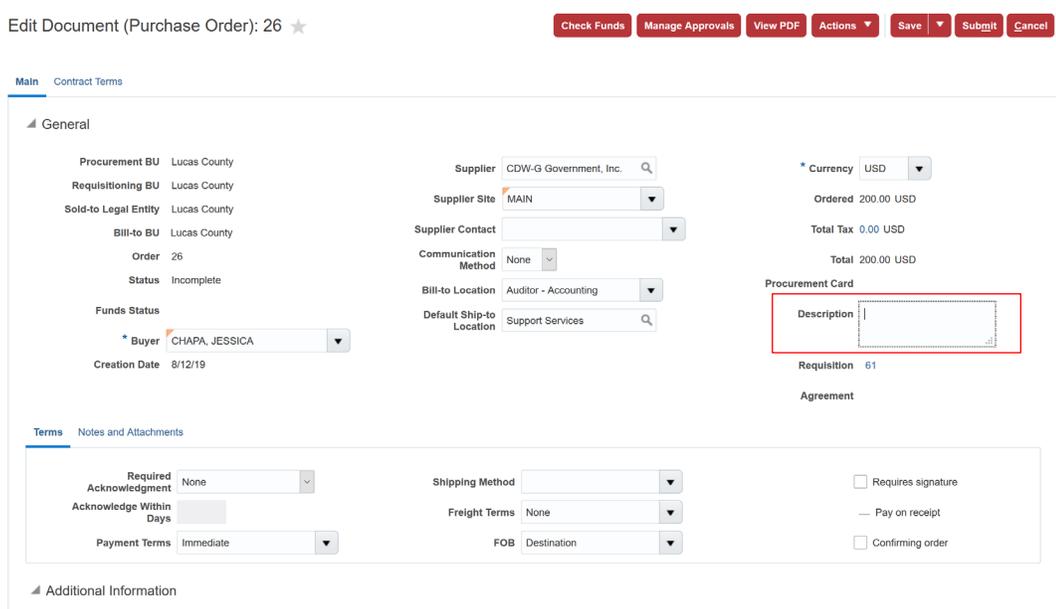
Contract terms templates:

- Contain sections and clauses from the Contract Terms Library.
- Are created in the Contract Terms Library separately. You cannot create them directly from an existing contract.
- Are specific to one business unit.
- Apply to enterprise contracts of the contract types you specify in the template.
- Are specific to either sell-intent or buy-intent contracts.
- Can default contract terms directly on purchase orders and sourcing documents, and on enterprise contracts. For these documents, contract terms templates can also include contract deliverables which can be used to track the completion of contractual tasks in the contract.

This job aid will assist with creating a purchase order from a requisition and adding special terms.

Step	Action
1	Log into Oracle. Home Page -> Procurement. 
2	Click the Procurement button.
3	Click the Purchase Orders button.
4	Click the Tasks icon.

	<p>Requisitions</p> <ul style="list-style-type: none"> • Process Requisitions • Import Requisitions • View Requisition Lines <p>Orders</p> <ul style="list-style-type: none"> • Manage Orders 																																																															
5	Click the Process Requisitions link.																																																															
6	<p>Highlight and select a requisition for processing.</p>  <p>Search Results: Requisition Lines</p> <table border="1"> <thead> <tr> <th>Requisition</th> <th>Line</th> <th>Line Description</th> <th>Requester</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Amount</th> <th>Currency</th> </tr> </thead> <tbody> <tr> <td>67</td> <td>1</td> <td>Moving Services</td> <td>AMANDA THO...</td> <td></td> <td></td> <td>200.00</td> <td>200.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>1</td> <td>Paper</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>5.00</td> <td>5.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>2</td> <td>Toner</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>60.00</td> <td>60.00</td> <td>USD</td> </tr> <tr> <td>65</td> <td>3</td> <td>Case of Paper</td> <td>AMANDA THO...</td> <td>1</td> <td>Each</td> <td>100.00</td> <td>100.00</td> <td>USD</td> </tr> <tr> <td>63</td> <td>1</td> <td>CONSULTING SERVICES FOR THE MONTH</td> <td>LILA SHOUSH...</td> <td>1</td> <td>Each</td> <td>4,200.00</td> <td>4,200.00</td> <td>USD</td> </tr> <tr> <td>61</td> <td>1</td> <td>Anti-virus Software</td> <td>AMANDA THO...</td> <td></td> <td></td> <td>200.00</td> <td>200.00</td> <td>USD</td> </tr> </tbody> </table>	Requisition	Line	Line Description	Requester	Quantity	UOM	Price	Amount	Currency	67	1	Moving Services	AMANDA THO...			200.00	200.00	USD	65	1	Paper	AMANDA THO...	1	Each	5.00	5.00	USD	65	2	Toner	AMANDA THO...	1	Each	60.00	60.00	USD	65	3	Case of Paper	AMANDA THO...	1	Each	100.00	100.00	USD	63	1	CONSULTING SERVICES FOR THE MONTH	LILA SHOUSH...	1	Each	4,200.00	4,200.00	USD	61	1	Anti-virus Software	AMANDA THO...			200.00	200.00	USD
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7	<p>Click the Add to Document Builder button.</p> 																																																															
8	Click in the Supplier field.																																																															
9	Enter the Supplier into the Supplier field.																																																															
10	<p>Select Supplier from the list.</p>  <p>Search and Select: Supplier</p> <p>Supplier: CDW</p> <table border="1"> <thead> <tr> <th>Supplier</th> <th>Supplier Number</th> <th>D-U-N-S Number</th> <th>Alternate Name</th> </tr> </thead> <tbody> <tr> <td>CDW Government</td> <td>100146</td> <td></td> <td></td> </tr> <tr> <td>CDW-G Government, Inc.</td> <td>100145</td> <td></td> <td></td> </tr> <tr> <td>CDWG, INC.</td> <td>100147</td> <td></td> <td></td> </tr> </tbody> </table>	Supplier	Supplier Number	D-U-N-S Number	Alternate Name	CDW Government	100146			CDW-G Government, Inc.	100145			CDWG, INC.	100147																																																	
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<p>12</p>	<p>Click the Create button.</p>  <p>Document Builder</p> <p>Requisitioning BU Lucas County</p> <p>Sold-to Legal Entity Lucas County</p> <p>Type New Order</p> <p>Source Agreement</p> <p>Style Purchase Order</p> <p>Supplier CDW-G Government, Inc.</p> <p>Supplier Site MAIN</p> <p>Currency USD</p> <p>Your Document Builder contains 1 lines.</p> <p>Recently Added Lines</p> <p>Anti-virus Software 200.00 USD Total 200.00 USD</p> <p>Edit Create Clear</p>
<p>13</p>	<p>Click the OK button.</p>  <p>Information</p> <p>The document (Purchase Order) 26 was created.</p> <p>OK</p>
<p>14</p>	<p>Click in the Description field.</p>  <p>Edit Document (Purchase Order): 26 ★</p> <p>Check Funds Manage Approvals View PDF Actions Save Submit Cancel</p> <p>Main Contract Terms</p> <p>General</p> <p>Procurement BU Lucas County Requisitioning BU Lucas County Sold-to Legal Entity Lucas County Bill-to BU Lucas County Order 26 Status Incomplete Funds Status Buyer CHAPA, JESSICA Creation Date 8/12/19</p> <p>Supplier CDW-G Government, Inc. Supplier Site MAIN Supplier Contact Communication Method None Bill-to Location Auditor - Accounting Default Ship-to Location Support Services</p> <p>Currency USD Ordered 200.00 USD Total Tax 0.00 USD Total 200.00 USD</p> <p>Procurement Card</p> <p>Description</p> <p>Requisition 61 Agreement</p> <p>Terms Notes and Attachments</p> <p>Required Acknowledgment None Acknowledge Within Days Payment Terms Immediate</p> <p>Shipping Method Freight Terms None FOB Destination</p> <p>Requires signature Pay on receipt Confirming order</p> <p>Additional Information</p>
<p>15</p>	<p>Enter a description for the Purchase Order into the Description field.</p>
<p>16</p>	<p>Click the Schedules tab to view.</p>

17	<p>Click the Distributions tab.</p>
18	<p>Click the Check Funds button.</p>
19	<p>Click the OK button.</p>
20	<p>Click Contract Terms tab.</p>
21	<p>Select Add Contract Terms.</p>
22	<p>Select Authoring Party = Internal. Contract Source = Terms Template.</p>
23	<p>Search and select Contract Terms Template = Services Agreement.</p>

24	Select OK .
25	Additional Contract Terms may be added by selecting the + icon.
27	Click the Manage Approvals button.
28	Click the Cancel button to return to previous screen.
29	Click the View PDF button.
30	Click the Submit button to complete the process.
31	Click the OK button.