

If you are creating a purchase order with multiple lines that will be charged to the same account string, you may use the **Preferences** function to save time.

Creating a multiple-line purchase order

- 1 Navigate to **Document Production > Purchase Orders**.

A blank Purchase Orders screen will display.

- 2 Enter the purchase order header details.

Field	Action	Comment
Type	This field will default to <i>Standard Purchase Order</i> and should not be changed.	
Supplier	Select the appropriate supplier from the List of Values (LOV).	
Site	Select the appropriate site from the LOV, if it is not populated.	This field will populate automatically if a single site is recorded against the supplier record.
Contact	This field will default from the record of the Supplier selected above.	If the supplier has multiple contacts this field will be blank, click on the LOV to view and select the appropriate contact.
Ship-To	This field will default to your department as recorded in your user profile.	Check that this location is correct. If incorrect, select the appropriate department from the LOV.
Bill-To	Select the appropriate department from the LOV.	
Buyer	This will default to your name.	
Description	Enter a description of the purchase (including the name of the person who requested the purchase order).	Enter a description up to 240 characters. Note: only the first 35 characters will display in the Special Instructions section of the printed order.

- 3 Click the **Save** icon on the toolbar to save the purchase order.

Themis will automatically allocate a purchase order number (displayed in the *PO, Rev* field).

- 4 Select **Tools > Preferences** from the Menu bar.

The Purchase Order Preferences screen will display.

- 5 Click on the LOV for the Charge Account field.
- 6 Enter your default general ledger charge account then click the **OK** button to close the screen.
- 7 Click the **Apply** button to save your account preferences.
A confirmation message advising “New preferences now in effect” will display on the bottom left of your Themis screen.
- 8 Close the Preferences screen to return to your purchase order.
Note: these preferences will only remain in use while in the Purchase Order screen. Once you return to the Navigator they will be discarded.
- 9 Enter the line details for each purchase.

Field	Action	Comment
Num	This field default to the first line number available.	
Type	Select the type of purchase form the LOV.	Note: if you are purchasing an asset, select the appropriate asset type based on the dollar amount of the item.
Item	Leave this field blank.	This field is only used when purchasing Inventory items from the Chemistry Store.
Description	Enter a description of the good/services being purchased.	
UOM	The unit of measure (UOM) will default to <i>Each</i> . If required, select an alternative value from the LOV.	If you selected a <i>Service</i> type above, this field will default to <i>Dollar</i> and cannot be changed.
Quantity	Enter the quantity of goods/services being purchased.	If you selected a <i>Service</i> type above, enter the total amount of the service being provided.
Price	Enter the per unit price of the item (excluding GST).	If you selected a <i>Service</i> type above the price field will default to <i>1</i> and cannot be changed.
[] (Descriptive Flex Field)	If you are purchasing an asset, select either <i>Single</i> or <i>Multiple Asset</i> from the LOV.	

Note: you do not have to access the Shipment screen if the goods are all being delivered to your department.

- 10 Click the **Save** icon on the toolbar.
- 11 Click the **Approve** button to send the purchase order to your Financial Approver.
The Approve Document screen will display. Check your approver details (update if necessary) and click **OK** to submit the purchase order.

Themis will automatically generate a workflow notification that will display in the approver’s workbench and, if the purchase order is not actioned on the same day, an overnight email will be sent to the approver.