General Purchase Order Steps

Use this tutorial to review the steps to ordering goods and services with a Purchase Order.

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Ordering Goods or Services with A Purchase Order - Review the Payment Matrix to see all payment methods: Purchase Order, PCard, Check Request or Reimbursement.

1. **Onboard the Supplier** - Review the supplier information in Workday to confirm they have been onboarded for purchase requisitions (reqs). If they are not, try using a supplier that is already in the system. If no other current supplier can be used, complete a New Supplier Request form.
2. **Obtain a Quote** - Contact the supplier to get a quote. Note, if the supplier has a catalog in UMarketplace, this step can be skipped.
3. **Create a Requisition** - Create a purchase req, add items to the shopping cart, and submit the req. (i.e.: RQ-0000123456)
   a. Creating Service Requisitions (non-catalog)
   b. Creating Goods Requisitions (UMarketplace)
   c. Creating Goods Requisitions (ad-hoc)
4. **Obtain Approval(s)** - Check the status of the Requisition’s approval(s). Once fully approved the req automatically closes. A purchase order (PO) is automatically generated and sent to the supplier. To view the PO number (i.e.: PO-0000123456), open the req, find the line item, and scroll to the right.
5. **Delivery** - The supplier will deliver the goods or render services. Should you have questions with arrival dates, contact the supplier and provide them with the PO number.
6. **Invoicing** - The supplier will send an invoice. The invoice should go directly to UM Accounts Payable. If instead the invoice is sent to the department, submit the invoice to Accounts Payable through the Workday UM Quicklinks icon.
7. **Change Orders** - In some cases, the invoice and PO do not match. Therefore, Accounts Payable will reach out to the department to request a change order. Once the change is submitted, it must go through the full approval again. After the change order is completely approved, the department can submit the invoice to Accounts Payable through the Workday UM Quicklinks icon.
8. **Close the Purchase Order** - Most POs do not automatically close. Once the check has been sent, the department can close the PO.