

Below is the procedure for creating Confirming Orders (formerly referred to as Bill Only PO):

1. Create a text line order for the service/item that requires payment:

General Data																	
Name of Shopping Cart:	CFREEL 02/29/2012 11:36	Approval Note															
Default Settings:	<input checked="" type="checkbox"/> Set Values																
Item Shopping Cart:	<input checked="" type="checkbox"/> Make accessible to my Purchasing Substitutes																
Approval Process:	Display / Edit Agents																
Document Changes:	Display																
Default Address:	D102416668 - Levine Science Research Center 308 Research Drive , Durham , 27																
Item Overview																	
Total Val. (Gross)	1,280.00	USD															
Details	Add Item	Copy	Paste	Duplicate	Delete	Change All											
Line Number	Item #	Supplier	Supplier ID	Supplier Cat #	Description	Quantity	UoM	Price	Account Category	Account Assignment	Account Assignment Description	GL Acct	G/L Description	Matl Grp	Delivery Dt.	Room No	Goods Recipient
* 1	1	NANTUCKET CAFE & CATERING(57054)	57054		Food for recruits	4	TR	320.00	Cost C			346437	FOOD (TAXABL	006	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel

2. Locate the *Special Need* column for the line item. Click the arrow icon and select *Confirming Order* from the drop down list:

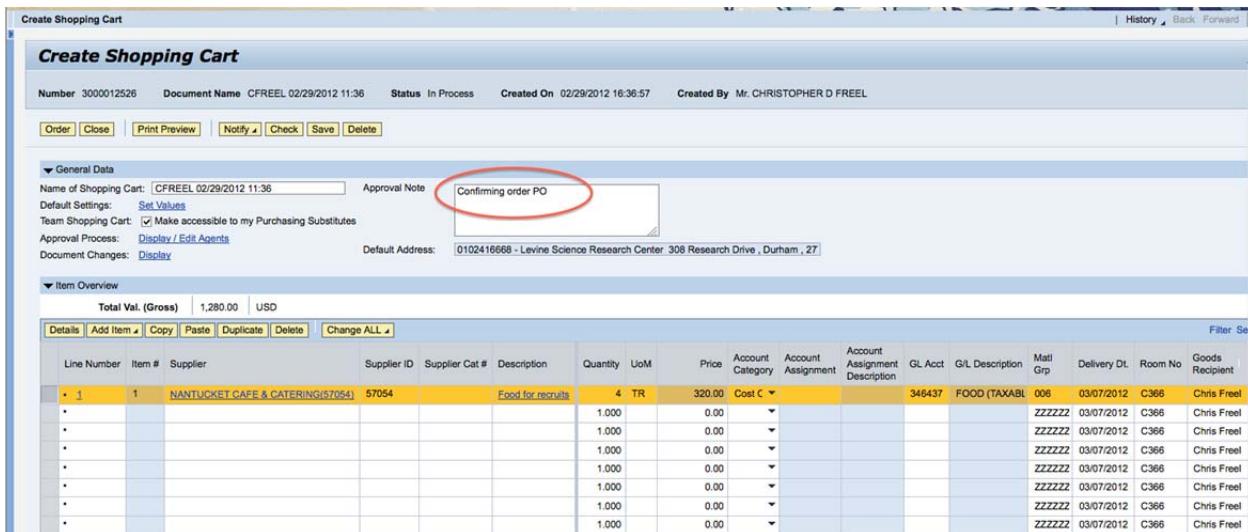
Details														Filter			
Line Number	Item #	Supplier	Supplier ID	Supplier Cat #	Description	GL Acct	G/L Description	Matl Grp	Delivery Dt.	Room No	Goods Recipient	Notes	Attach.	Special Need	Matl Grp Desc	Item Status	AC Assignment
* 1	1	NANTUCKET CAFE & CATERING(57054)	57054		Food for recruits	346437	FOOD (TAXABL	006	03/07/2012	C366	Chris Freel	0	0	Food			Cost Cent
*														None			
*														Bill only PO	RM Initial Default		
*														New Address	RM Initial Default		
*														New Vendor	RM Initial Default		
*														SRM Initial Default			
*														SRM Initial Default			
*														SRM Initial Default			
*														SRM Initial Default			

3. Add a note in the *Supplier Text* field in *Details* indicating that the order is a confirming order for the payment of an invoice and attach a copy of the invoice:

Details														Filter			
Line Number	Item #	Supplier	Supplier ID	Supplier Cat #	Description	Quantity	UoM	Price	Account Category	Account Assignment	Account Assignment Description	GL Acct	G/L Description	Matl Grp	Delivery Dt.	Room No	Goods Recipient
* 1	1	NANTUCKET CAFE & CATERING(57054)	57054		Food for recruits	4	TR	320.00	Cost C			346437	FOOD (TAXABL	006	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel
*						1.000		0.00						ZZZZZZ	03/07/2012	C366	Chris Freel

Details for item 1 Food for recruits																	
Item Data		Account Assignment		Notes and Attachments		Delivery Address		Supplier Info		Approval Process Overview							
Notes																	
<input type="button" value="Clear"/>																	
Category		Description															
Supplier Text (Appears on PO)		Confirming order for payment on invoice															
Internal Note		Empty															
Attachments		Add Attachment		Edit Description		Versioning		Delete		Create Profile							
Category		Description		File Name		Version		Processor		Visible Internally only		Checked Out		Type	Size (KB)	Changed By	Changed On
Standard Attachment		nantucket_invoice		nantucket_invoice.docx		1				<input checked="" type="checkbox"/>		<input type="checkbox"/>		docx	26	CFREEL	02/29/2012

4. Add "Confirming Order PO" or "Special Needs PO" to the Approval Note filed at the top of the cart:



The screenshot shows the 'Create Shopping Cart' page. At the top, there are tabs for 'History', 'Back', and 'Forward'. Below the tabs, the page header includes 'Number 3000012526', 'Document Name CFREEL 02/29/2012 11:36', 'Status In Process', 'Created On 02/29/2012 16:36:57', and 'Created By Mr. CHRISTOPHER D FREEL'. Below the header are buttons for 'Order', 'Close', 'Print Preview', 'Notify', 'Check', 'Save', and 'Delete'. A section titled 'General Data' contains fields for 'Name of Shopping Cart: CFREEL 02/29/2012 11:36', 'Approval Note' (which has 'Confirming order PO' typed into it and is circled in red), 'Default Settings' (with a link to 'Set Values'), 'Team Shopping Cart' (with a checked checkbox for 'Make accessible to my Purchasing Substitutes'), 'Approval Process' (with links to 'Display / Edit Agents' and 'Display'), and 'Document Changes' (with a link to 'Display'). Below this is a section titled 'Item Overview' with a table showing item details. The table has columns for Line Number, Item #, Supplier, Supplier ID, Supplier Cat #, Description, Quantity, UoM, Price, Account Category, Account Assignment, Account Assignment Description, GL Acct, G/L Description, Matl Grp, Delivery Dt., Room No, and Goods Recipient. There are seven rows of data in the table, all with the same values: Line Number 1, Item # 1, Supplier NANTUCKET CAFE & CATERING(57054), Supplier ID 57054, Supplier Cat # Food for recruits, Description Food for recruits, Quantity 4, UoM TR, Price 320.00, Account Category Cost C, Account Assignment 346437, Account Assignment Description FOOD (TAXABL, GL Acct 006, G/L Description FOOD (TAXABL, Matl Grp ZZZZZZ, Delivery Dt. 03/07/2012, Room No C366, and Goods Recipient Chris Freel). The first row is highlighted with yellow.

This creates a Buy@Duke cart that is marked **Special Needs**. The cart routes through the business unit and institutional approval process, if applicable. After approvals are complete, the cart routes to Procurement for processing. All purchase order numbers for **Confirming Order** transactions are assigned an 8505xxxxx purchase order number.

When Procurement processes the order, the invoice is printed and the purchase order number is noted on the invoice. The attached invoice is sent to Accounts Payable for payment and the purchase order is printed. The attached invoice does not go out to the vendor.