General Purchase Order Steps

Steps to ordering goods and services with a Purchase Order

http://workday.miami.edu

Ordering Goods or Services With A Purchase Order

- Review the Payment Matrix to see all payment methods: Purchase Order, PCard, Check Request or Reimbursement.
- Make sure the supplier is approved and available in Workday. See the Onboarding Quick Start Tutorial for details.

1. Create an Order – Create and submit a purchase requisition (req). When the req is completely approved, it will automatically close. Then a purchase order (po) is issued and appears on each line item in the req. For non-catalog items contact the supplier for a quote before starting the process below.

2. Send PO to Supplier - The PO is sent to the supplier either by Workday or manually by the Purchasing Buyers.

3. Deliver of Goods/Services – The supplier will provide the goods or services listed in the PO.

4. Invoices – The supplier should send the invoice to Accounts Payable (AP).
   If the supplier instead sends the invoice to the department, the department will need to find the PO number. This appears in the requisition on the line item on the right hand side. Then submit the PO number and invoice to AP by going to Workday, click UM Quicklinks, and #2 Submit Invoice. Do not create a “Supplier Invoice.” This verbiage is misleading and is not the same as paying an invoice.

5. Change Orders - In some cases, the invoice and PO do not match. Therefore, AP 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 contact the AP rep and advise them there is enough money on the PO to pay the invoice.