

PO Entry: Setting Preferences

The purpose for setting Preferences is to save time and keystrokes while entering purchase orders. Preferences may be set in cases where a PO Department Buyer has more than one purchase order to enter during an AIS session, where some of the information will be identical, e.g., Procurement Organization, Requestor (person entering the order), and Location (Deliver-To address). Setting preferences is optional.

- To set preferences, select the Responsibility:
 - **SIU PO Department Buyer**;
 - Then select, **Purchase Orders > Purchase Orders**.
- When the SIU Purchase Orders [New] - window appears, you can set preferences for the session using the **Tool** menu.
- Click on the Tools menu and select Preferences.
- The Purchase Order Preferences (SIU Operating Unit) window appears.
- It is recommended that you populate the following fields on this form.
 - Organization - (i.e., Springfield Procurement Org)
 - Requestor - (Last name, First Name of person entering the purchase order)
 - Location - (Deliver-To address of person that prepared the order)
- Click in the **Organization** field and type **spf**, then press Tab.
 - The field will populate with Springfield Procurement Organization.
- Click in the **Requester** field and type several characters of the Preparer's last name, then press Tab.
 - If you type in enough characters of the Preparer's last name to make it unique, when you press tab the field will populate with the person's first and last name.
 - If you don't type enough of the Preparer's last name to make it unique, when you press Tab, a pick list will appear, from which you can select the correct name.
- Click in the **Location** field and type several characters of the location where you want the goods delivered, then press tab.
 - If you type in enough characters of the Location to make it unique, when you press tab the field will populate with the Deliver-To Location.
- If you don't type enough of the Location to make it unique, when you press Tab, a pick list will appear. You can select the correct Deliver-To Location using the picklist.
- Once the Location field is populated, the system automatically advances to the Project Information tabbed region. None of these fields need to be populated
- **Save** the data entered in the Main tabbed region by clicking the Apply button.
- These Preferences will remain in effect until you exit AIS.
- Preferences must **be reset** upon each re-entry into AIS.
- Close the Setting Preferences window, using your preferred method; you are ready to begin entering the PO.