

## How to Order by Item Group

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Select New Order – Order by Group. The Order by Group Page will open.
3. Select the Order Group. The choices are :
4. If you selected Item Group, Item Category, USDA Category, MPO, or Vendor, select the corresponding search selection.
5. Select **Generate**. The Order by Item Page will open with all of the items found that match your search.
6. Enter   for all desired items.
7. Select **Save** to save the order and submit later or select **Submit Order** at the top of the screen to submit now. A confirmation screen will open.
8. Select .

## How to Order by Vendor

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Select New Order – Order by Vendor. The Order by Group Page opens with the Vendor radio button selected
3. Select the desired Vendor from the drop-down box next to the Vendor radio button.
4. Select **Generate**. The Order by Vendor Page will open with all of the items found that match your search.
5. Enter   for all desired items.
6. Select **Save** to save the order and submit later or select **Submit Order** at the top of the screen to submit now. A confirmation screen will open.
7. Select .

## Track

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.

### View All Open Orders

When you select the View All Open Orders link on the Purchasing Page, the Order Search Page will open with all open orders displayed at the bottom of the screen.

### View All Orders

When you select the View All Orders link on the Purchasing Page, the Order Search Page will open with all orders displayed at the bottom of the screen.

### View Saved Orders

When you select the View Saved Orders link on the Purchasing Page, the Order Search Page will open with all saved orders displayed at the bottom of the screen.

## View Submitted Orders

When you select the View Submitted Orders link on the Purchasing Page, the Order Search Page will open with all submitted orders displayed at the bottom of the screen.

## View Approved Orders

When you select the View Approved Orders link on the Purchasing Page, the Order Search Page will open with all open orders displayed at the bottom of the screen.

## View Released Orders

When you select the View Released Orders link on the Purchasing Page, the Order Search Page will open with all released orders displayed at the bottom of the screen.

## View Received Orders

When you select the View Received Orders link on the Purchasing Page, the Order Search Page will open with all received orders displayed.

## Receive

### How to Receive Orders

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Select Receive - Receive Order link. The Order Search Page will open.
3. Select the order by selecting the order number (Order #). The Order Details Page will open with the items in the order displayed.
4. Confirm the received qty and units and update if needed.

5. Select **Receive Order** to receive this order. You will receive a confirmation message.

6. Select **OK**.  
The Status will changed to **Received**

### How to Return Items


1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Under Receive, select the Receive Order link. The Order Search Page will open.
3. Select the order by selecting the order number (Order #). The Order Details Page will open with the items in the order displayed.
4. Enter the quantity and units of the item you wish to return into the Returned column:

Returned Qty	Units
<input type="text" value="0"/>	CASE

5. Select **Receive Order** to return the items. You will receive a confirmation message.
6. Select **OK**.

## Transfer

### How to Transfer Items Out

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Under Transfer, select Transfer Items Out. The Transfer Items Out Page will open.
3. Select the Transfer from site from the drop-down box. This will default to your site.
4. Select the Transfer to site from the drop-down box. This is the site that you would like to transfer the item(s) to.
5. Enter the item that you would like to transfer into **Add Item :**  and select **Add**. The item will appear on the screen.
6. Enter the Transfer Qty and Units to transfer.
7. Repeat steps 5 and 6 for all items you would like to transfer.
8. Select  to delete any unwanted items.
9. Once you have entered all items, select **Transfer Items Out**. You will receive a confirmation message.
10. Select **OK**. You will receive a message that the items were transferred to the other site.

## How to Receive Transferred Items

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Under Transfer, select the Receive Transferred Items link. The Order Search Page will open with all open orders In Transit displayed at the bottom of the screen.
3. Select the desired order by clicking on the order number in the Order # field. The items in the order will be displayed.

4. Enter

Received Qty   Units	Returned Qty   Units
10   CASE	10   CASE

5. Select **Receive Order**

6. Select **OK**

## Submit Orders

1. Select **Purchasing** from the Main Menu. The Purchasing Page will open.
2. Under Management, select Submit Orders. The Order Search Page will open with all saved orders displayed at the bottom of the screen.
3. Select the desired order by clicking Edit in the Action column. All of the items in the order will display.
4. Change the Saved order if needed. You can add items or change quantities.
5. Select **Submit Order**
6. Select **OK**

## Order Status

**Not Saved**

The order's status is Not Saved when an order is first created and has not yet been saved.

**Saved**

You have created an order and you have saved it, but you are not quite ready to Submit it. You can continue to add or remove items from a saved order.

**Submitted**

You have submitted the order and you are waiting for the Central Office to approve it. You can delete items and change quantities.

**Released**

The Central Office has approved and released the order. You can no longer add or remove items.

**Released - In Transit**

Issued requisitions, including site to site transfers, have a Released-In Transit status until you receive the items into your inventory.

**Received - Partial**

The status will be Received - Partial if you have received some of the items on the order and are waiting on the remainder items.

**Received**

All items on the order have been received into inventory.

## Notes