

QUICK REFERENCE GUIDE

Add a Purchase Order by Copying from an Existing Purchase Order

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Add a Purchase Order by Copying from an Existing Purchase Order

Buyers can save a great deal of time creating a purchase order by copying from an existing purchase order. It can be especially helpful for adding purchase orders with multiple lines.

There are three different methods for copying existing documents into a new purchase order. SWIFT's Procurement Team recommends only using the **Copy from Purchase Order** option here.

- **Requisition:** There are certain circumstances that require sourcing a requisition directly into a purchase order. For that scenario, refer to the Expedite Requisition process. This process is described in the **Requisition Process Quick Reference Guide Contract**:
- Copy contract information at the individual line level of the new purchase order. Use the *Contract Search* feature on the **Contract** tab. This process is described in the **Creating Purchase Order User Guide** in Lesson 2.

These purchasing reference guides can be found on the SWIFT Training and Support web pages:

<https://mn.gov/mmb/accounting/swift/training-support/index.jsp>

- **Navigation:** Training and Support, Reference Guides, Procurement, Purchasing

Be very careful when copying an existing purchase order into a new purchase order.

Make sure that everything copied correctly. Also, check the fields that may be different. Chartfields may have changed between fiscal years.

- Doc Types impact the information on a purchase order.
- Update any Descriptions that refer to a previous fiscal year.
- Taxes may need to be updated.'

Process Steps to Add a Purchase Order by Copying from an Existing Document

1. Create a new purchase order.

- **Navigation:** Purchasing, Purchase Orders, Add/Update POs.
- On the Purchase Order page, the **Add a New Value** tab defaults. On this page, enter the *Business Unit* and click on the **Add** button.

The screenshot shows a web interface for adding a purchase order. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red box. Below the tabs, there is a 'Business Unit' field with a search icon, containing the text 'G1001'. Below this is a 'PO ID:' field with a 'NEXT' button. At the bottom left, there is an 'Add' button highlighted with a red box.

2. **Copy an existing purchase order.**

- On the Header, go to the *Copy From* drop down menu. Select "Purchase Order".

Maintain Purchase Order

Purchase Order

Business Unit: G1001 Origin:

PO ID: NEXT [Approval Exception](#)

Copy From:

- On the **Copy Purchase Order from Purchase Order page**, enter information about the desired purchase order. For example, enter the *PO ID*. Click **Search**.
- On the **Select PO** page, click the **Select** check box of the current purchase order. Click **OK**.

Copy Purchase Order from Purchase Order

PO Selection Criteria

PO ID: PO Date:

Vendor: Status:

Vendor ID: Origin:

Buyer: Item ID:

PO Reference: Category:

Select PO Personalize | Find | View All | | First 1 of 1

Select	PO ID	PO Date	PO Status	Vendor ID	Vendor
<input checked="" type="checkbox"/>	3000003131	06/25/2015	Complete	0000237572	ALLSTEEL I-001

3. **Respond to the message.**

- It means that SWIFT will overwrite any information that you may have entered on this new purchase order. Click **OK**.

Message

Copying from a PO will overwrite the existing PO. Continue? (10200,449)

If you continue, the system will overwrite the existing PO Header, Lines, and Schedules. If you do not wish to do this, select 'Cancel'.

4. **Carefully review the details from the existing purchase order that was copied over.**

Some fields copy the default. Update these fields as necessary. **Always** verify the fields from the copied purchase order.

If you have questions about the steps, refer to the **Creating Purchase Orders User Guide**.

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