PURCHASE ORDER TYPES
(CHART BELOW)

Confirming Invoice – To be used when you already have an invoice and the PO does not need to be sent to the vendor. Using this PO Type will prevent a hard copy PO from printing. No receiving is required on this order type.
Confirming Order – To be used when calling in the PO number to the vendor. If you do not plan to send a hard copy PO, use **"Phone"** dispatch method. If you do want to send a PO, select **"Print"** for the dispatch method and select the Standard Comment language of **"Confirming Order"** so the vendor will not double ship the order.
Prepaid Order - A Prepaid Order is the mechanism to use when a check needs to go to the vendor with the Purchase Order, whether it is a check for the full amount of the order or a partial payment (deposit, down payment, retainer etc.) The pdf file of the PO will be routed to an AP person so they can have the check cut to go with the order. No receiving is required on this order type.
Quote Order – Always use this order type when a vendor has given you a quote for the product or service you are ordering. The University should never pay more than what a vendor has quoted. When you use this order type, the system will warn the accounts payable staff that an invoice is for more than the order price and should not be paid at the higher amount.
Regular Order – Just your ordinary order!
Standing Order - A Standing Order is an order that establishes a relationship between a vendor and the University that creates efficiencies for both parties. Though these orders can be created to cover many scenarios, an illustrative example would be when a Facilities Department needs to shop at a local hardware store. The Department knows that, over the course of a fiscal year, they may spend about $4000 at the hardware store. So that they do not have to create a purchase order each and every time an employee goes to that store, a Standing Order is used. Once a Standing Order has been established with the vendor, employees need only to go to the store, pick up what they need, and tell the vendor what PO # to charge it to. Standing Orders allow several departments to have similar relationships (separate Standing Orders) with the vendor without confusion over who is paying for what. No receiving is required on this order type. ***NOTE: When setting up Standing Orders enter the Dollar Amount in the Quantity field and the Unit price as 1.***
Standing Order - Fixed Payment – This is an order that will span a period of time against which several payments of the same amount will be posted, e.g., leases. No receiving is required on this order type.
Standing Order Gov't FY – These are just like regular Standing Orders, only their effective date is the federal government's fiscal year: October 1 – September 30. No receiving is required on this order type.

The following orders are required by Facilities Management to encumber construction projects:

Construction Contract **- All construction contracts are to be entered into the Purchasing System as purchase orders which will create an encumbrance against the project account.**
Construction Quote – PO Type to be used when entering an order for construction that is not covered by a contract.
Design Contract - All design contracts are to be entered into the Purchasing System as purchase orders which will create an encumbrance against the project account.
The following PO types are only for organizing your POs. There is no requirement or functionality associated with these types.

Library Acquisitions – May be used for Library Acquisitions, if desired.
Personal Services **–** May be used to designate orders that are associated with Personal Services Contracts. (If they are multiple payment orders they may be set up like a Standing Order, i.e., give them a PO Type of Personal Services so that you can segregate them, but set them up like they are a standing order so you can post many invoices against them.)
Sponsored Programs - May be used to designate orders that are associated with Sponsored Programs Contracts. (If they are multiple payment orders they may be set up like a Standing Order, i.e., give them a PO Type of Sponsored Programs so that you can segregate them, but set them up like they are a standing order so you can post many invoices against them.)

PURCHASE ORDER TYPES

TYPE	WHEN USED	HEADER COMMENT	PRINT HARD COPY*	RECEIVING REQUIRED
Confirming Invoice (CI)	Have not yet created the PO But have received the products & an invoice	Yes Standard Comment	No	No
Confirming Order (CO)	Have placed or will verbally place the order the order via phone.	Yes Standard Comment	Yes if Print dispatch No if Phone dispatch	Yes
Prepaid Order (PP) (include partial payment)	When check must accompany PO	Yes Standard & Freestyle	Yes (to Accts Payable only)	No
Quote Order (QO)	When you have received a written quote from the Vendor. Allows no tolerance in invoice amount	Not Required	Yes	Yes
Regular Order (RO)	DEFAULT – When no other type is more appropriate	Not Required	Yes	Yes
Standing Order (SO) Switch Qty & Amt or Use Amt Only checkbox	To make multiple low dollar purchases over an extended amount of time (usually 1 year) Most often used from July 1 to June 30	Yes	Yes	No Department should sign off on Invoice
Standing Order-Govt FY (SG)	Same as a SO but for Government Accounts Fiscal Year October 1st to September 30	Yes	Yes	No Department should sign off on Invoice
Standing Order- Fixed Payment (SF)	Used to make consistent payments over an extended amount of time for the same dollar amount. For example (contracts with monthly payments, rent, leases, etc.)	Yes	Yes	No Department should sign off on Invoice
Personal Services……. Switch Qty & Amt or Use Amt Only checkbox	Used to designate Personal Services contracts.	Not Required	Yes	Yes

DO NOT USE THE FOLLOWING ORDER TYPES IF YOU DO NOT BELONG TO THE DEPARTMENT LISTED

Construction Contracts……Facilities
Construction Quotes……Facilities .
Design Contracts…….Facilities
Library Acquisitions……Library
Sponsored Programs……Sponsored Programs

* PRINT HARD COPY: Information provided in this column is based on the PeopleSoft Default that is set. You may alter whether or not a PO prints based on the Dispatch Method you choose ("More PO Defaults") page. Prepaid Orders dispatch to Accounts Payable and can't be altered. If you choose the Phone Dispatch Method a purchase order will not print.