

# Standing Purchase Order

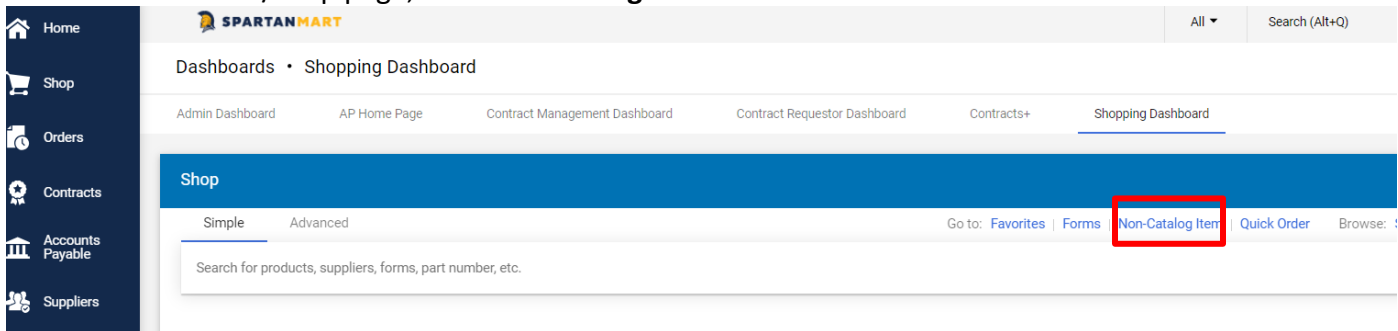
**Definition of a Standing Order:** Standing purchase orders are used to facilitate frequently recurring charges to the same vendor over a specified period of time. It allows the requester to order a particular commodity or service multiple times directly from a provider without having to generate a separate purchase order in each instance.

**\*\*A standing order Must always have a QTY of 1, Unit of measure should be LOT. Cost receipts are required for standing orders.**

Standing order usually uses the Non-catalog orders method to create a cart.

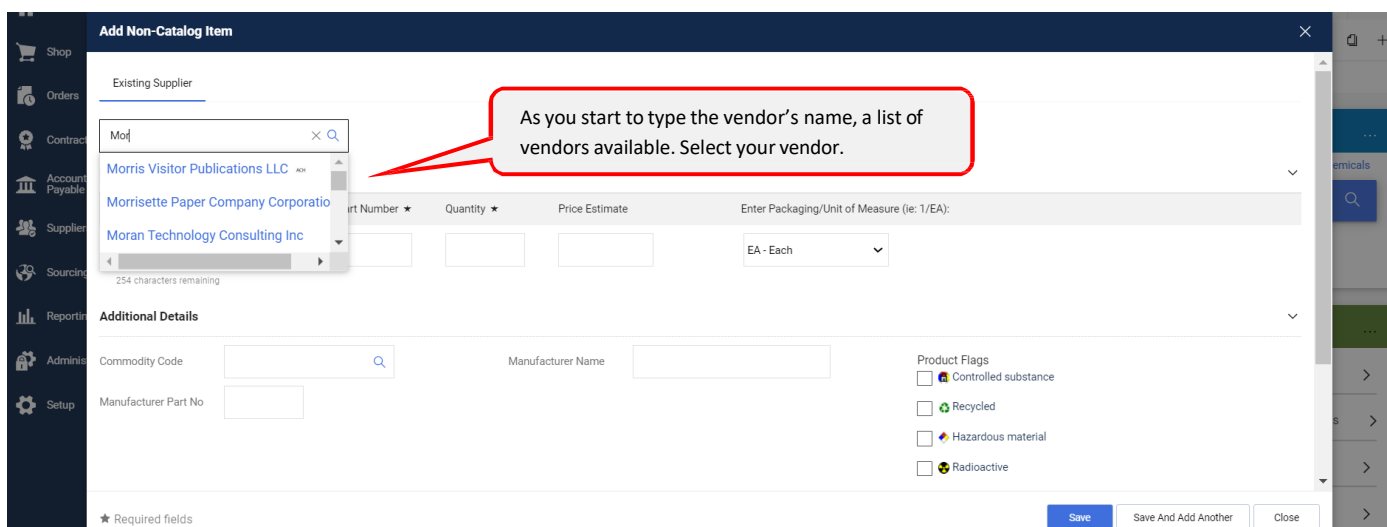
**Note: Make sure to have the vendor name, product information, and unit pricing prior to selecting the non-catalog order form.**

1. From the home/shop page, click **non-catalog item** in the 'Go to:' section.



2. Enter the supplier name in the **Enter Supplier** textbox. Notice as you type the name that a list of available suppliers is available for you to select from. Select the supplier from the list.

\*Note: If the supplier you want to use is not available, you must enter it as a new supplier (See **New Vendor**



## Ordering

3. Enter the product information for the item you want to purchase in the **Product Description** textbox, enter the catalog number in the **Catalog No.** textbox, enter the number of items you want to purchase in the **Quantity** textbox, enter the price in the **Price Estimate** textbox and select the unit of measure (UOM) in the **Packaging** textbox (the default UOM is EA-Each). These fields are all required.

**\*Note:** Example of Item Description for a standing order: Unit of Measure should be LO (for LOT). This will allow Cost receipts as deliveries occur.

Morrisette Paper Company Corporation · 1 Item · 10,000.00 USD

^ SUPPLIER DETAILS ACH

Contract no value PO Number To Be Assigned

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Standing Order for Paper towels for July 1, 2023- June 30, 2024. Contract# 123456	n/a	LO	10,000.00	1 LO	10,000.00

^ ITEM DETAILS

4. Enter the commodity code in the **Commodity Code** textbox. Since this is a non-catalog order, you will need to search for the commodity code.

- Click the magnifying glass next to the Commodity Code textbox.

Add Non-Catalog Item

Existing Supplier

Morrisette Paper Company Corporation × Q Morrisette Paper Company Corporation ACH ×

Fulfillment Address ▼ Dis

VN Purchasing Vendor 1 📍 - PO Box 20768, Greensboro, North Carolina 27420 United States

Item 7 items have been found containing '123456' in their Catalog No. [View all in search results](#)

Product Description ★	Item/Part Number ★	Quantity ★	Price Estimate
Creme Cleanser 20oz Bottle 12/Cs 221 characters remaining	123456	10	39.99

Additional Details

Commodity Code  Cleaning and janitorial supplies

Manufacturer Name

Click the magnifying glass to search for the commodity

- Enter the item in **Description contains...** textbox and click **Search**. (For help with Commodity Codes, see **Commodity Code Searches** instructions.)

The screenshot shows the 'Commodity Code Search' dialog box. At the top, there is a dark blue header with the title 'Commodity Code Search' and a close button (X). Below the header, there are three input fields: 'Code starts with...', 'paper towels', and 'Filter'. A red callout box points to the 'paper towels' field with the text 'Enter the item in the Description contains... textbox.' Another red callout box points to the 'Filter' button with the text 'Then click Filter.' Below the input fields are two buttons: 'Filter' and 'Clear All Filters'. A table with two columns, 'Code ↑' and 'Description', is shown below. The first row contains the code '14111703' and the description 'Paper towels', with a blue plus sign (+) to the right of the description. At the bottom right of the dialog box is a 'Close' button.

- You are returned a list of codes from which to select. Click the + button for the item you would like to select. **Select** the code that best fits the item you are purchasing.

This screenshot is similar to the previous one, showing the 'Commodity Code Search' dialog box. The 'Filter' button is now disabled, and the 'Clear All Filters' button is visible. The table below shows the same search results: 'Code ↑' and 'Description' columns, with the first row containing '14111703' and 'Paper towels'. The blue plus sign (+) to the right of 'Paper towels' is now highlighted with a red square. A 'Close' button is located at the bottom right of the dialog box.

5. Click **Save and Add Another** if you have other items to order, or **Save** if you have all the items you need.

**Add Non-Catalog Item**

Existing Supplier

Morrisette Paper Company Corporation

Morrisette Paper Company Corporation ACH

**Fulfillment Address** **Distribution Methods**

VN Purchasing Vendor 1 - PO Box 20768, Greensboro, North Carolina 27420 United States

**Item** 7 items have been found containing '123456' in their Catalog No. [View all in search results](#)

Product Description *	Item/Part Number *	Quantity *	Price Estimate	Enter Packaging/Unit of Measure (ie: 1/EA):
Crema Cleanser 20oz Bottle 12/Cs	123456	10	39.99	CS - Case

221 characters remaining

**Additional Details**

Commodity Code: 47130000 (Cleaning and janitorial supplies)

Manufacturer Name: [ ]

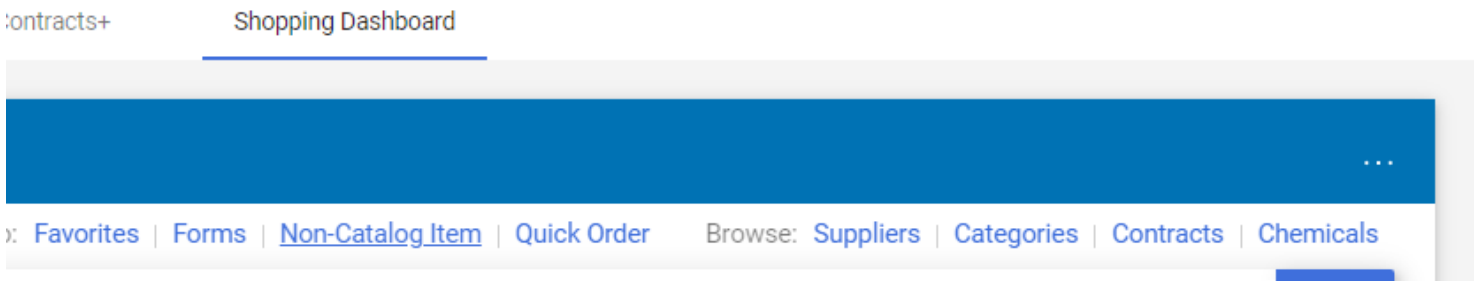
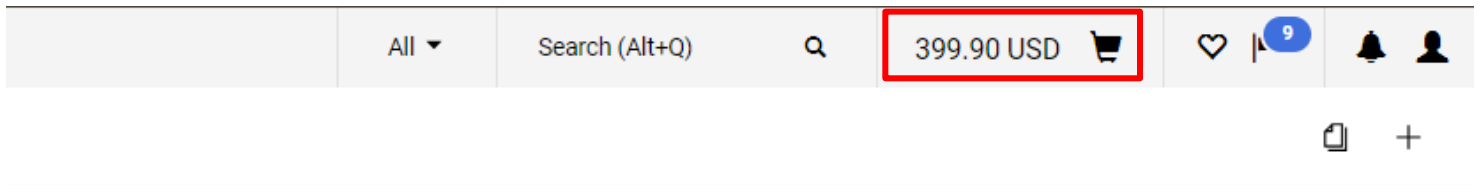
Manufacturer Part No: [ ]

Product Flags:  Controlled substance,  Recycled

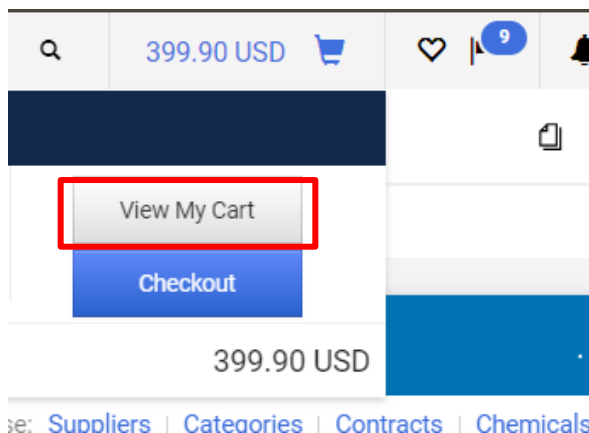
★ Required fields

Save Save And Add Another Close

6. Go to your cart by **clicking the cart** in the upper right hand corner of SpartanMart.



7. Click **View Cart**



8. You are taken to the active cart with your selected items. Name your Cart if you wish, Click Proceed to Checkout.

SPARTANMART

Shopping Cart • Shopping Cart

Assign Cart **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

**Cart Name** 2023-10-25 AWBIRCHE 01

Description

Priority Normal

Freight/Handling Pre-approved?

Bankwire

Summary

Details

For Allysa Robinson

Total (399.90 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal *	399.90
Shipping	0.00
Handling	0.00
<b>Total *</b>	<b>399.90</b>

10 Items


Morrisette Paper Company Corporation • 10 Items • 399.90 USD

9. Select the edit pencil in the General Section.

SPARTANMART

Requisition • 181695072

Summary Taxes/S&H PO Preview Comments Attachments History

**General** 

Cart Name	2024-01-19 AWBIRCHE 01
Description	no value
Priority	Normal
Prepared by	Allysa Robinson
Prepared for	Allysa Robinson
Standing PO	✗
Confirming Order	✗
Order Type	no value
Withholding	no value
Vendor Type	no value
Bankwire	✗
PO Clauses	2 <a href="#">Edit</a>   <a href="#">View details</a>

**Shipping**

**Ship To**

Contact Name Allysa Robinson, Rm 203G  
Phone +1 336-334-5997  
Email awbirche@uncg.edu  
UNCG-Procurement Services  
840 Neal St  
Greensboro, NC 27403  
United States

Shipping address code PURC99

**Delivery Options**

Expedite ✗

Ship Via Best Carrier-Best Way

Requested Delivery Date no value

Freight/Handling Pre-approved? no value

**Purchasing Dept Buyer Information**

10. Check the Standing PO check box, then Click save.

The screenshot shows the 'Edit General' window for a purchase order. The 'Standing PO' checkbox is checked and highlighted with a red box. The 'Save' button at the bottom right is also highlighted with a red box. Other fields include 'Cart Name' (2024-01-19 AWBIRCHE 01), 'Priority' (Normal), 'Prepared by' (Allysa Robinson), and 'Prepared for' (Allysa Robinson).

11. Look to make sure a green check mark appears next to the confirming order box. Click Edit button next to PO Clauses.

The screenshot shows the 'General' form for the purchase order. The 'Standing PO' field now has a green check mark next to it, indicated by a yellow arrow. The 'Confirming Order' field has a red 'X' next to it. The 'PO Clauses' field has an 'Edit' button highlighted with a red box. Other fields include 'Cart Name' (2024-01-19 AWBIRCHE 01), 'Priority' (Normal), 'Prepared by' (Allysa Robinson), and 'Prepared for' (Allysa Robinson).

12. Click check box with the PO clause named STANDING, then Click Save Changes.

STANDING	STANDING	Standing order for the following Supplies/Services as ordered by the following department for the period and amount specified below:	<input checked="" type="checkbox"/>
XMAS	XMAS	UNCG will be closed for winter holidays from Tuesday, 12/24/2024 and re-open Thursday, 01/02/2025. Please schedule deliveries accordingly.	<input type="checkbox"/>

[Save Changes](#) [Cancel](#)

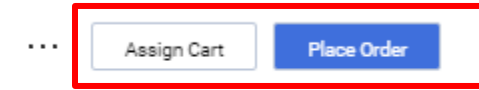
13. This PO clause will make sure that the PO does not get sent to the vendor since the order has already been placed with the vendor ( by email, by phone, in person, etc. ) Verify that Standing PO is checked and PO Clause number has increased by 1 clause.

Standing PO	<input checked="" type="checkbox"/>	
Confirming Order	<input type="checkbox"/>	
Order Type	no value	
Withholding	no value	
Vendor Type	no value	
Bankwire	<input type="checkbox"/>	
PO Clauses	3	<a href="#">Edit</a>   <a href="#">View details</a>

14. **All Standing orders** must have instructions to the vendor in the External notes section or in the Item description section on how they should handle this standing order. Click the Pencil to edit this section. Example pictured below.

<b>Internal Notes and Attachments</b>		<b>External Notes and Attachments</b>	
Internal Note	no value	Note to all Suppliers	Do not deliver until requested. Standing Purchase order for FY23-24.
Internal Attachments	<a href="#">Add</a>	Attachments for all suppliers	<a href="#">Add</a>

15. Process your PO as you normally would from this step. If you do not have default account codes you may need to enter them now. Then you can Assign the cart or click place order depending on your user role permissions. **(See... How to Create a Cost receipt for instructions once items have been delivered)**



**Example of a Standing order with more than 1 line on the PO:**

**etails**

No.	Product Name	Catalog No.	Unit Price	Qty/UOM
1	Uniform rental for Facilities Operations staff for FY21 (117503) (Estimated \$303/week for 51weeks; July 2021 - June 2022)	n/a	15,408.00 USD	1 LO
		Qty / Cost (In)	Qty / Cost (Out)	Status
		15,408.00 USD		Net Received
			1,515.58 USD	Cost Received
2	Uniform rental for Facilities Operations staff (130004) (\$17/week for 51 weeks; July 2022 - June 2023)	n/a	850.00 USD	1 LO
		Qty / Cost (In)	Qty / Cost (Out)	Status
		850.00 USD		Net Received
			500.54 USD	Cost Received
3	Uniform rental for Facilities Operations staff (130023) (\$1.50/week; 51 weeks; July 2022 - June 2023)	n/a	75.00 USD	1 LO
		Qty / Cost (In)	Qty / Cost (Out)	Status
		75.00 USD		Net Received
			57.33 USD	Cost Received
4	Uniform rental for Facilities Operations staff (130035) (\$17/week for 51 weeks; July 2022 - June 2023)	n/a	860.00 USD	1 LO
		Qty / Cost (In)	Qty / Cost (Out)	Status
		860.00 USD		Net Received
			597.97 USD	Cost Received
5	Uniform rental for Facilities Operations staff (310011) (\$1.50/week; 51 weeks; July 2022 - June 2023)	n/a	75.00 USD	1 LO



Example of Cost receipts: Weekly Invoice for Uniforms, cost can vary from week to week. Create a cost receipt for the exact invoice dollar amount.

38313572	5/11/2023	Cost	320.10 USD	Robinson, Allysa
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AP will create the invoice in spartanmart and this cost receipt will “fully match” the invoice.

IJ049927	2090142529	5/10/2023	6/2/2023	Invoice	Paid	320.10 USD	Browne, Quenisha
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Purchase order will keep up with the amount invoiced and the Open amount remaining on each line on the standing order.

Extended Price	Invoice Qty/Cost	Status
15,408.00 USD	n/a / 184.06 USD n/a / 15,223.94 USD	Open Net Invoiced
850.00 USD	n/a / 850.00 USD	Net Invoiced
75.00 USD	n/a / 26.59 USD n/a / 48.41 USD	Open Net Invoiced
860.00 USD	n/a / 179.68 USD n/a / 680.32 USD	Open Net Invoiced
75.00 USD	n/a / 24.83 USD n/a / 50.17 USD	Open Net Invoiced