# 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.**
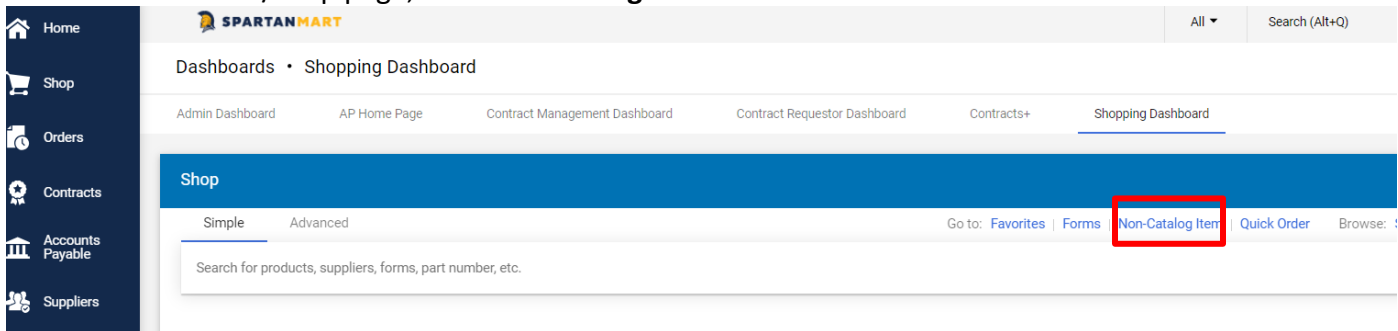


2. Enter the supplier name in the **Enter Supplier** textbox. Notice as you type the name that a list of available suppliers is available for you to select from. Select the supplier from the list.
*Note:  If the supplier you want to use is not available, you must enter it as a new supplier (See **New Vendor**
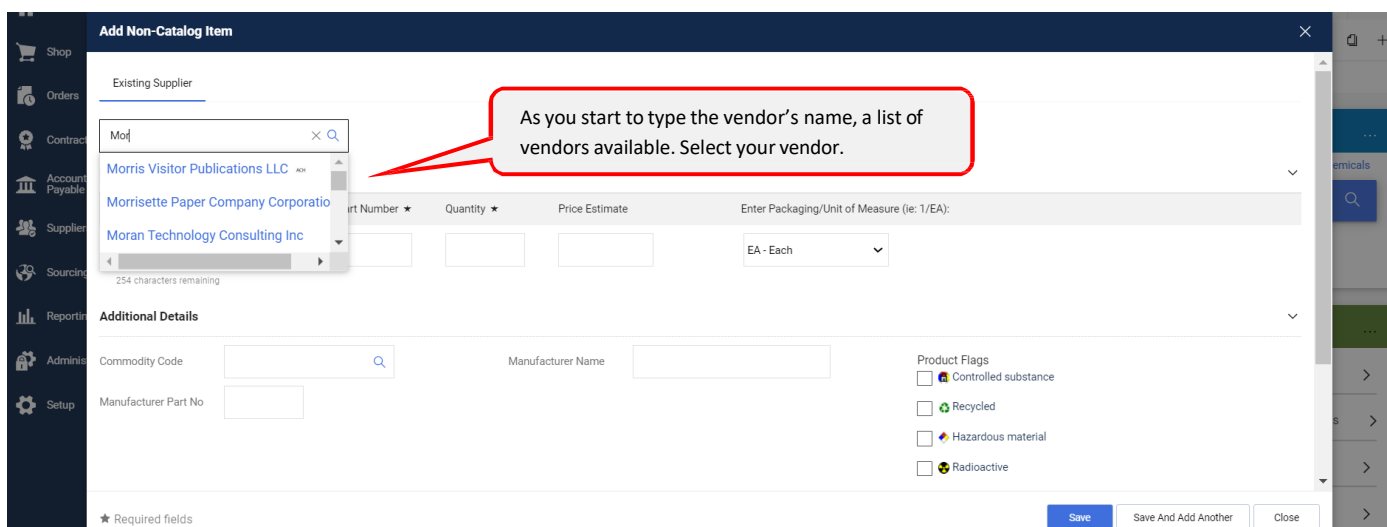
**Ordering**

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.*



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.

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

**Commodity Code Search** ✕

| Code starts with… | paper towels | Filter |

Enter the item in the **Description contains…** textbox.

Then click **Filter.**

Clear All Filters

| Code ↑ | Description | |
|---|---|---|
| 14111703 | Paper towels | + |

Close

- 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.

**Commodity Code Search** ✕

| Code starts with… | paper towels | Filter |

Clear All Filters

| Code ↑ | Description | |
|---|---|---|
| 14111703 | Paper towels | + |

Close

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



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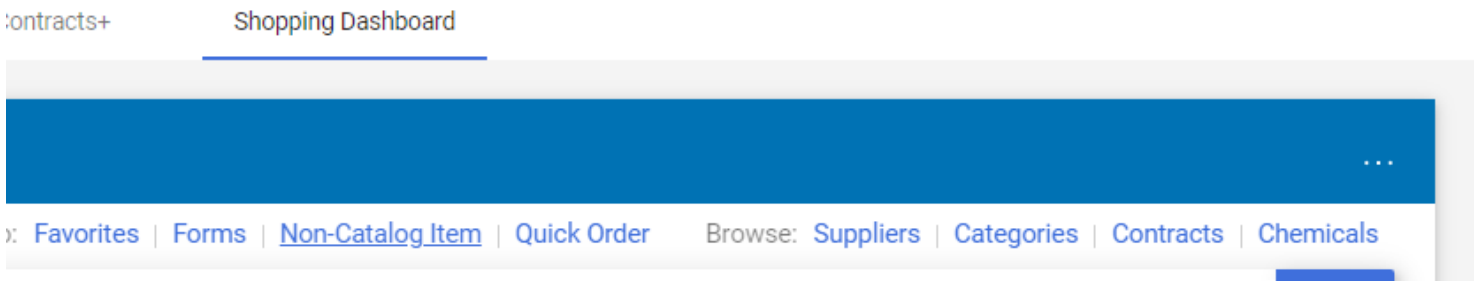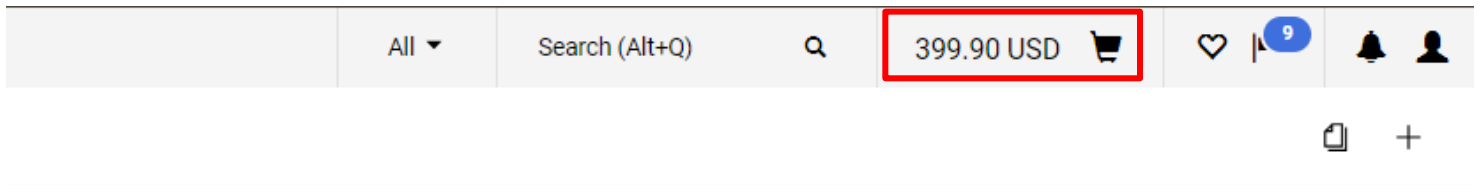


7. **Click View Cart**
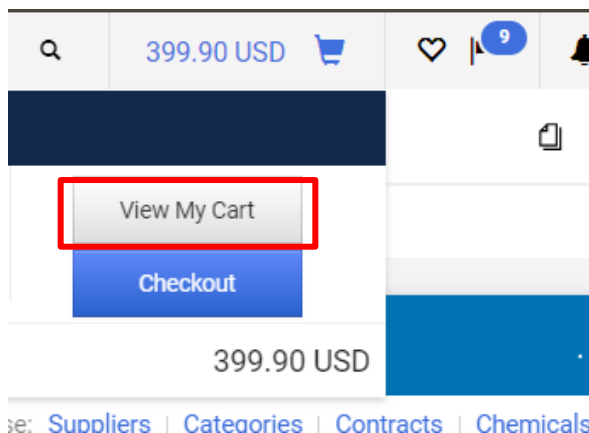
8. You are taken to the active cart with your selected items.  Name your Cart if you wish, Click Proceed to Checkout.



9. Select the edit pencil in the General Section.

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



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

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: | ✓ |
| 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. | ☐ |

**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 | ✓ |
| Confirming Order | ✗ |
| Order Type | no value |
| Withholding | no value |
| Vendor Type | no value |
| Bankwire | ✗ |
| PO Clauses | 3  Edit | View details |

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.

**Internal Notes and Attachments** ✏ ···

| Internal Note | no value |
| Internal Attachments | Add |

**External Notes and Attachments** ✏ ·· ⌄

| Note to all Suppliers | Do not deliver until requested. Standing Purchase order for FY23-24. |
| Attachments for all suppliers | Add |

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)**

· · ·   | Assign Cart |   **Place Order**
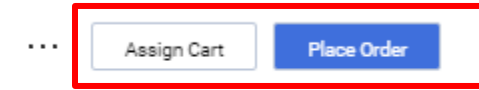
*Example of a Standing order with more than 1 line on the PO:*

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 |

| No. | Product Name | Catalog No. | Unit Price | Qty/UOM |
|---|---|---|---|---|
| 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 |

| No. | Product Name | Catalog No. | Unit Price | Qty/UOM |
|---|---|---|---|---|
| 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 |

| No. | Product Name | Catalog No. | Unit Price | Qty/UOM |
|---|---|---|---|---|
| 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 |

| No. | Product Name | Catalog No. | Unit Price | Qty/UOM |
|---|---|---|---|---|
| 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 |
|---|---|---|---|---|---|---|---|---|

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 |
|---|---|---|---|---|---|---|---|

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<br>n/a / 15,223.94 USD | Open<br>Net Invoiced |
| 850.00 USD | n/a / 850.00 USD | Net Invoiced |
| 75.00 USD | n/a / 26.59 USD<br>n/a / 48.41 USD | Open<br>Net Invoiced |
| 860.00 USD | n/a / 179.68 USD<br>n/a / 680.32 USD | Open<br>Net Invoiced |
| 75.00 USD | n/a / 24.83 USD<br>n/a / 50.17 USD | Open<br>Net Invoiced |