PO Tool 4 – 'Amount Only' Information

V.1.3.	07-25-12

This document contains an overview of the '**Amount Only**' option on Requisitions and Purchase Orders in SMART

🧱 Foundation Information

When to use the 'Amount Only' option on requisitions and/or purchase orders:

➢ 'Amount Only' determines how the goods/services are to be paid (not how the dollar amount will be distributed across the funding lines)

➢ Use 'Amount Only' when payments (and vouchers) to the vendor need to be made for a dollar amount *NOT* a quantity

➢ Selecting the 'Amount Only' option on requisitions and/or purchase orders allows your agency to make payments to the vendor based on an appropriate dollar amount, NOT on a specific quantity

➢ An 'Amount Only' PO can be copied into multiple vouchers in SMART, *UNTIL* the entire dollar amount on the PO has been vouchered. Once the entire dollar amount has been vouchered in SMART, the PO is fully matched and can *NOT* be used any more.
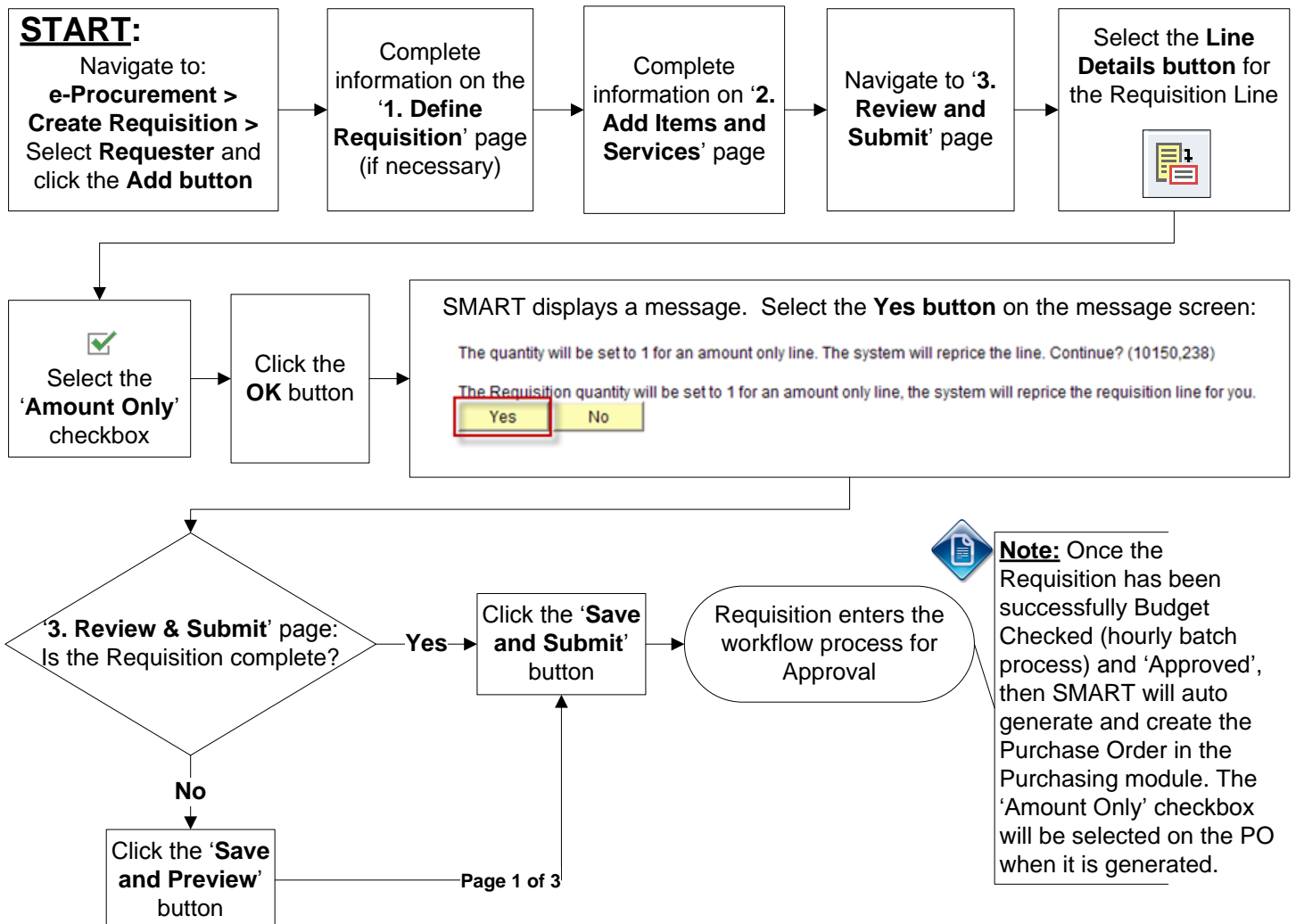
Refer to **Solution Article #569** in the **Service Desk** for additional information.

📷 Creating a Requisition in SMART using the 'Amount Only' option

Example: Lease payments may not be the same amount each month; therefore you would want to create an 'Amount Only' requisition (which sources to a purchase order) so that your agency can make payments based on a different dollar amount each month. Keep in mind that the 'Fund' and 'Budget Unit' **must** remain the same for each payment in this example.

START: Navigate to: **e-Procurement > Create Requisition >** Select **Requester** and click the **Add button**	→	Complete information on the '**1. Define Requisition**' page (if necessary)	→	Complete information on '**2. Add Items and Services**' page	→	Navigate to '**3. Review and Submit**' page	→	Select the **Line Details button** for the Requisition Line

☑️ Select the '**Amount Only**' checkbox	→	Click the **OK** button	→	SMART displays a message. Select the **Yes button** on the message screen: The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238) The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you. [Yes] [No]

'**3. Review & Submit**' page: Is the Requisition complete?

Yes → Click the '**Save and Submit**' button → Requisition enters the workflow process for Approval

No ↓

Click the '**Save and Preview**' button — Page 1 of 3

Note: Once the Requisition has been successfully Budget Checked (hourly batch process) and 'Approved', then SMART will auto generate and create the Purchase Order in the Purchasing module. The 'Amount Only' checkbox will be selected on the PO when it is generated.
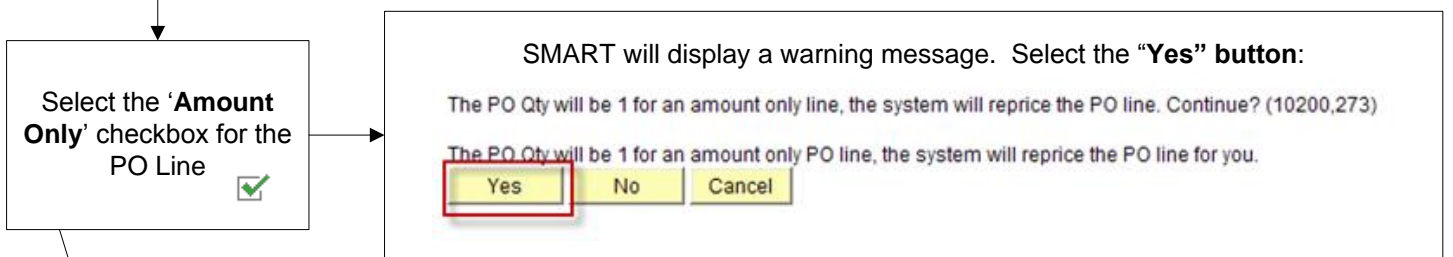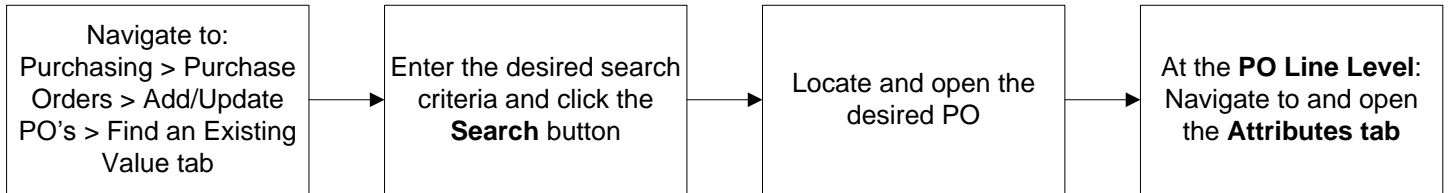
✍ Example: Changing an existing PO Line from a 'Quantity PO' Line to an 'Amount Only' PO Line

If the 'Amount Only' option was _NOT_ selected on the requisition line, and _it should have been_; the Buyer should change the PO line from a 'Quantity PO' line to an 'Amount Only' PO line. Changing the PO line from a 'Quantity PO' line to an 'Amount Only' PO line enables the agency to make payments for the PO Line by dollar amount, as opposed to having to pay by a quantity of items. **_For example:_** If the PO line is for one year of pest control services, we would expect the agency to be invoiced after each time the service is provided. We would also expect that the invoice would be for a dollar amount which may vary from invoice to invoice.

If a PO line is for a specific quantity of items and each item costs the same price, then the 'Amount Only' option should _NOT_ be selected (the PO line will be a 'Quantity PO' line). **_For example:_** If the PO line is for 10 widgits at a set price per widget, then we would expect the agency to be invoiced for a specific quantity of widgits, and the agency would pay for that specific quantity of widgits at the specified price (eg: 2 widgits at $2.00 each).

START:

Navigate to: Purchasing > Purchase Orders > Add/Update PO's > Find an Existing Value tab	Enter the desired search criteria and click the **Search** button	Locate and open the desired PO	At the **PO Line Level**: Navigate to and open the **Attributes tab**

Select the '**Amount Only**' checkbox for the PO Line ☑

SMART will display a warning message. Select the "**Yes**" button:

The PO Qty will be 1 for an amount only line, the system will reprice the PO line. Continue? (10200,273)

The PO Qty will be 1 for an amount only PO line, the system will reprice the PO line for you.

[Yes]   [No]   [Cancel]

NOTE: The "Amount Only" option is not available on the purchase order once a purchase order has been received against and/or the purchase order is copied into a voucher

If you are selecting "Amount Only" _after_ the PO has been 'Dispatched', a "Change Order" is created and the following message is displayed. Select **"Yes" button**.

This action will create a change order. Continue? (10200,27)

The action that you are taking will cause the system to create a change order. If you do not want to create a change order, then you cannot perform the action at this time.

[Yes]   [No]

Review the '**Dispatch Method**' on the PO or the Change Order

→ Should the vendor receive a copy of the PO or the Change Order? — **No** → Change the Dispatch Method to '**Phone**' or '**Print**'

Yes

Change the Dispatch Method to '**Email**' or '**Fax**' → Click on the **Merkur** Delivery Information link. Add the new email or fax destination by clicking the **'+' button** and completing the details. → **Approve** the PO or the Change Order and then click the **Save button**