

## Purchase Order Inquiry

**Audience:** Procurement agent, Requester, Supplier

**Purpose:** You can search for and review purchase orders as a procurement agent. Managing the purchase order life cycle enables the procurement agent, the requester, and the supplier to track and monitor the execution cycle of the order and initiate and manage changes to the order including cancellations.

The information you can view on the Document History is organized into three tracking levels:

1. The header and status information for the original document.
2. Actions taken on the original document. For example, Request Acknowledgment, or Change Order.
3. Actions taken on change orders. For example, Submit.

History information you can view for a document includes:

- Document header information, such as: buyer, supplier and supplier site, procurement business unit, document number, and status.
- Action performed.
- Performed by party and name.
- Action date.
- Additional Information.

Document history actions you can view include:

- Approvals (For example: Submitted, Approved, Rejected)
- Changes (For example: Change Submitted, Pending Change Approval, and Change Approved)
- Other Actions (For example Canceled, Returned, or Reassigned)

This job aid will assist you within inquiring purchase order data via Order Lifecycle screens.

Step	Action
1	Log in. <b>Home -&gt;Procurement -&gt; Purchase Orders -&gt; Tasks</b> icon.

2 Click on **Manage Orders**.

- View Requisition Lines

Orders

- **Manage Orders**
- Create Order
- Generate Orders
- Import Orders

3 Use **Basic** or **Advanced Search** to narrow down search. Enter partial number in the **Order** field. Click **Search**.

4 Click the row selector to highlight the **Purchase Order**.

5 Click on **Order Life Cycle -> View Details**.

Search Results

Order	Description	Supplier	Ordered	Currency	Status	Life Cycle	Change Order	Creation Date
18		Action Pest Con...	19.00	USD	Closed for Rece...			8/12/19
19		Action Pest Con...	38.00	USD	Open			8/12/19
17		Action Pest Con...	39.00	USD	Open			8/12/19
16		Action Pest Con...	78.00	USD	Open			8/12/19

6 Click on any **Receipts** links, if any. Click **Done** to return to Order life Cycle.

Receipts

Receipt	Receipt Date	Shipment	Ship Date	Packing Slip	Returned	Received	Delivered	Invoiced	Open to Invoice
2017	8/12/19 1:21 PM				0.00	19.00	19.00	0.00	0.00

Receipt: 2017 View Transaction History Done

Summary

Supplier	Action Pest Control, Inc.	Packing Slip
Shipment		Waybill
Shipped Date		Bill of Lading
Shipping Method		Note
Number of Supplier Packing Units		Attachments None
Supplier Site	MAIN	

Additional Information

Lines

Item	Item Description	Document Type	Document Number	Quantity				UOM Name	Currency	Receipt Date
				Ordered	Returned	Net Received	Rejected			
	Pest Control Ser...	Purchase order	18	1	0	1	0	Each	8/12/19 1:21 PM	

7 Click on any **Invoice** links, if any. Review and then click the **Done** button to return to Order Life Cycle.

Invoices

Actions View Format Freeze Detach Wrap

Invoice	Invoice Date	Status	Invoice Total	Paid	Matched Amount	Receipt	Packing Slip
No results found.							

Columns Hidden 3

8 Click the **Done** button to return to Manage Orders.

9 Click an Order Link (Select an Order that has Change Orders)

10 Click on **Actions -> View Document History/View Change History/View Revision History**.

Overview Manage Orders x Purchase Order: 19 x

Purchase Order: 19

View PDF Actions Done Order Life Cycle

Main

General

Procurement BU	Lucas County	Supplier	Action Pest Control, Inc.	Ordered	57.00
Requisitioning BU	Lucas County	Supplier Site	MAIN	Total Tax	0.00
Sold-to Legal Entity	Lucas County	Supplier Contact		Total	57.00
Bill-to BU	Lucas County	Communication Method	None	Description	
Order	19	Bill-to Location	Auditor - Accounting	Requisition	28
Status	Open	Ship-to Location	Support Services	Source Agreement	5
Funds Status	Reserved			Supplier Order	
Buyer	JESSICA CHAPA				
Creation Date	8/12/19				

Terms Notes and Attachments

Order Life Cycle

Ordered 57.00

View Document History View Change History View Revision History

View Document History. Click the **Done** button to return to Order details.

Document History: 19

Buyer JESSICA CHAPA Supplier Action Pest Control, Inc.

Procurement BU Lucas County Supplier Site MAIN

Sold-to Legal Entity Lucas County Status Open

Order 19

Description

Action	Party	Name	Action Date	Additional Information
Change Order 1	Buyer	JESSICA CHAPA	8/15/19 9:29 AM	Quantity and requested delivery date changed.
Submit	Buyer	JESSICA CHAPA	8/15/19 9:33 AM	
Approve	Approver	RUTH ASHFORD	8/15/19 9:34 AM	
Approve	Approver	JESSICA CHAPA	8/15/19 9:37 AM	
Reserve	Application		8/15/19 9:37 AM	
Implement Revision 1	Application		8/15/19 9:37 AM	Quantity and requested delivery date changed.
Original Document	Buyer	JESSICA CHAPA	8/12/19 1:20 PM	

Done

View Change History. Click the **Done** button to return to Order details.

Overview Manage Orders x Purchase Order: 19 x Purchase Order: 19 x

Change History: 19 Done

Currency = US Dollar

Actions View Format Freeze Detach Wrap

Change Order	Description	Resulting Revision	Creation Date	Initiating Party	Initiator	Type	Proposed Amount Change	Amount Changed	Status
1	Quantity and requested delivery date changed.	1	8/15/19	Buyer	JESSICA CHAPA	External	+19.00	+19.00	Processed

View Revision History. Click the **Done** button to return Order details.

Overview Manage Orders x Purchase Order: 19 x Purchase Order: 19 x

Revision History: 19 Done

Currency = US Dollar

Actions View Format Freeze Detach Wrap

Revision	Change Order	Description	Creation Date	Initiating Party	Initiator	Amount Changed
1	1	Quantity and requested delivery date changed.	8/15/19	Buyer	JESSICA CHAPA	+19.00
0			8/12/19	Buyer	JESSICA CHAPA	+38.00

11 Click on the **Funds Status** link.

Additional Information

Context Prompt

Lines Schedules Distributions

Actions View Format Freeze Detach Wrap

Line	Item	Description	Quantity	UOM	Price	Ordered	Status	Funds Status	Details
1		Pest Control Services -Monthl	3	Each	19.00	57.00	Open	Reserved	

Columns Hidden 42

✓ Funds Reservation: Purchase Order 19

View Transaction

Transaction Lines Impacted by Control Budgets

View Funds Status All

Line-Sc	Status	Requested	PO Charge Account	Budget Account	Budget Period	Control Budget	Budge Manag
1-1-1	✓ Increased funds availat	-19.00 USD	1010.114001.50.670001.00000.000	1010-114001-50-67000	2019	LC Annual Absolute - Op...	KELLE
1-1-1	✓ Passed budgetary conti	19.00 USD	1010.114001.50.670001.00000.000	1010-114001-50-67000	2019	LC Annual Absolute - Op...	KELLE
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Done

12 Click the **Done** button.

13 Click the **Details** link.

Lines Schedules Distributions

Actions View Format Freeze Detach Wrap

Line	Item	Description	Quantity	UOM	Price	Ordered	Status	Funds Status	Details
1		Pest Control Services -Monthl	3	Each	19.00	57.00	Open	Reserved	

Columns Hidden 42

14 Click on the **Requisition** link.

Overview Manage Orders x Purchase Order: 19 x

Line: 1

Back Next Actions Done

Sold-to Legal Entity	Lucas County	UOM	Each
Order	19	Quantity	3
Line Type	Goods	Price	19.00 USD
Item			✓ Negotiated
Description	Pest Control Services -Monthly -Vehicle Maintenance 644 State St, Toledo	Ordered	57.00 USD
Supplier Item		Total Tax	0.00 USD
Supplier Configuration ID		Total	57.00 USD
Category Name	675		
Status	Open		
Funds Status	Reserved		

Shipping and Delivery

Location	Support Services	Destination Type	Expense
Organization	LCINVORG	Requester	RUTH ASHFORD
Requested Delivery Date	8/16/19	Deliver-to Location	Support Services
Promised Delivery Date		Requisition	28
Shipping Method			

15 View Requisition Lines. Click the **Done** button.

	<p>Requisition Lines <span style="float: right;">Done</span></p> <p>Advanced Search <span style="float: right;">Basic Manage Watchlist Saved Search All My Requisition Lines</span></p> <p>Procurement BU Equals Lucas County</p> <p>** Requisitioning BU Equals Lucas County</p> <p>** Requisition Starts with 28</p> <p>** Buyer</p> <p>** Requester</p> <p>** Deliver-to Location</p> <p>Line Description Starts with</p> <p>** Category Name</p> <p>** Negotiation</p> <p>** Order 19</p> <p>Search Results</p> <p>Actions View Format Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Requisition</th> <th>Line</th> <th>Line Description</th> <th>Requester</th> <th>Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount</th> <th>Currency</th> <th>Order</th> <th>Negotiation</th> <th>Life Cycle</th> </tr> </thead> <tbody> <tr> <td>28</td> <td>1</td> <td>Pest Control Services -Monthly -Vehicle Maintenance 644 Sta</td> <td>ASHFORD, RUTH</td> <td>1</td> <td>Each</td> <td>19.00</td> <td>19.00</td> <td>USD</td> <td>19</td> <td></td> <td></td> </tr> <tr> <td>28</td> <td>2</td> <td>Pest Control Services -Monthly -Vehicle Maintenance 644 Sta</td> <td>ASHFORD, RUTH</td> <td>1</td> <td>Each</td> <td>19.00</td> <td>19.00</td> <td>USD</td> <td>19</td> <td></td> <td></td> </tr> </tbody> </table>	Requisition	Line	Line Description	Requester	Quantity	UOM Name	Price	Amount	Currency	Order	Negotiation	Life Cycle	28	1	Pest Control Services -Monthly -Vehicle Maintenance 644 Sta	ASHFORD, RUTH	1	Each	19.00	19.00	USD	19			28	2	Pest Control Services -Monthly -Vehicle Maintenance 644 Sta	ASHFORD, RUTH	1	Each	19.00	19.00	USD	19		
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