



# **501 PR344**

## **Processing Purchase Orders**

Instructor Led Training



# Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

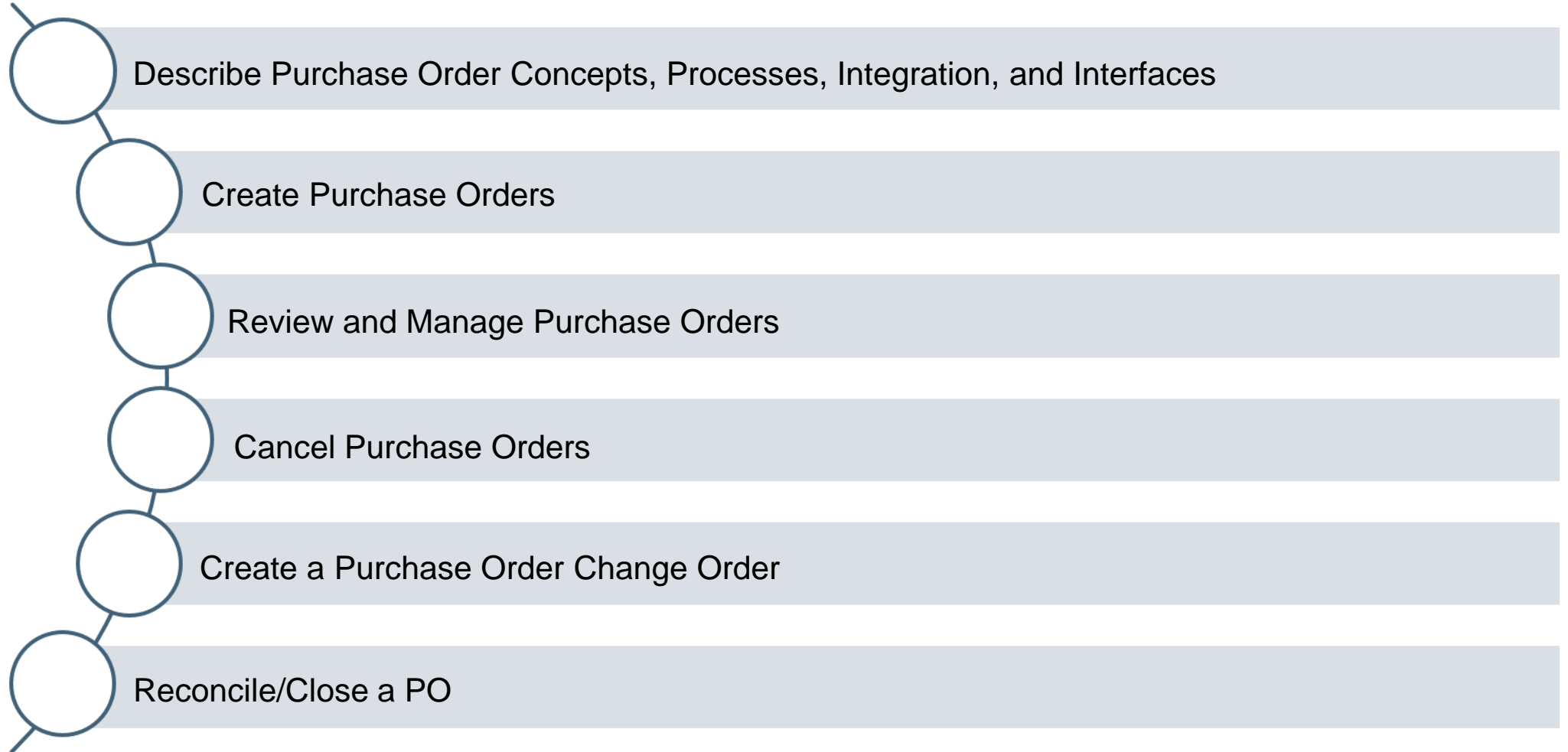
The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



# Course Objectives

After completing this course, you will be able to:





# Agenda

1

Understand Purchase Orders

2

Process Purchase Orders

3

Maintain and Modify (Change Orders) Purchase Orders

4

Reconcile/Close a PO – 3 Way Match

5

Review Purchase Order Information, History, and Activities



# Lesson 1: Introduction

1

## Understand Purchase Orders

This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Procurement Process Overview
- Purchase Order Process
- Integration with Accounts Payable
- Interfaces with eVA and SiteManager



# Procurement Overview

The Procurement functional area of Cardinal includes four modules:

## Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

## eProcurement

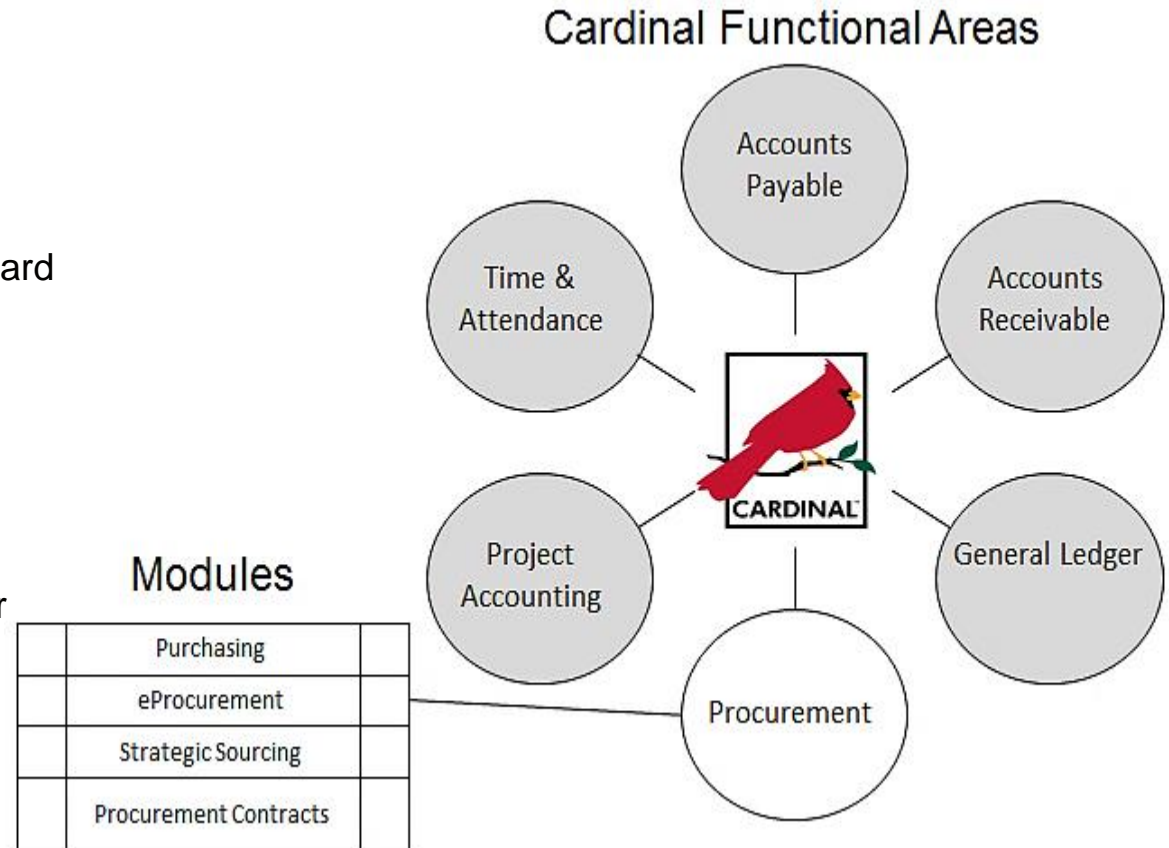
Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

## Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids/proposals to purchase orders or contracts.

## Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.





# Key Concepts

- Cardinal interfaces with external systems (eVA, SiteManager, etc.) daily, which eliminates duplicate entries in multiple systems.
- The Statewide procurement supplier database is updated by eVA daily and maintained by the Commonwealth Supplier Group (CVG). It is shared with all agencies. Fiscal suppliers (non-procurement suppliers) are created directly in Cardinal by the Commonwealth Vendor Group (CVG). The suppliers are shared between the Accounts Payable and the Procurement functional areas.



- Add/Update Requisitions
- Create Strategic Sourcing Events
- Add/Update Contracts
- Add/Update Purchase Orders
- Receive/Inspect Goods
- Procurement Card Processing
- Integrated Supply Services Program (ISSP) Processing









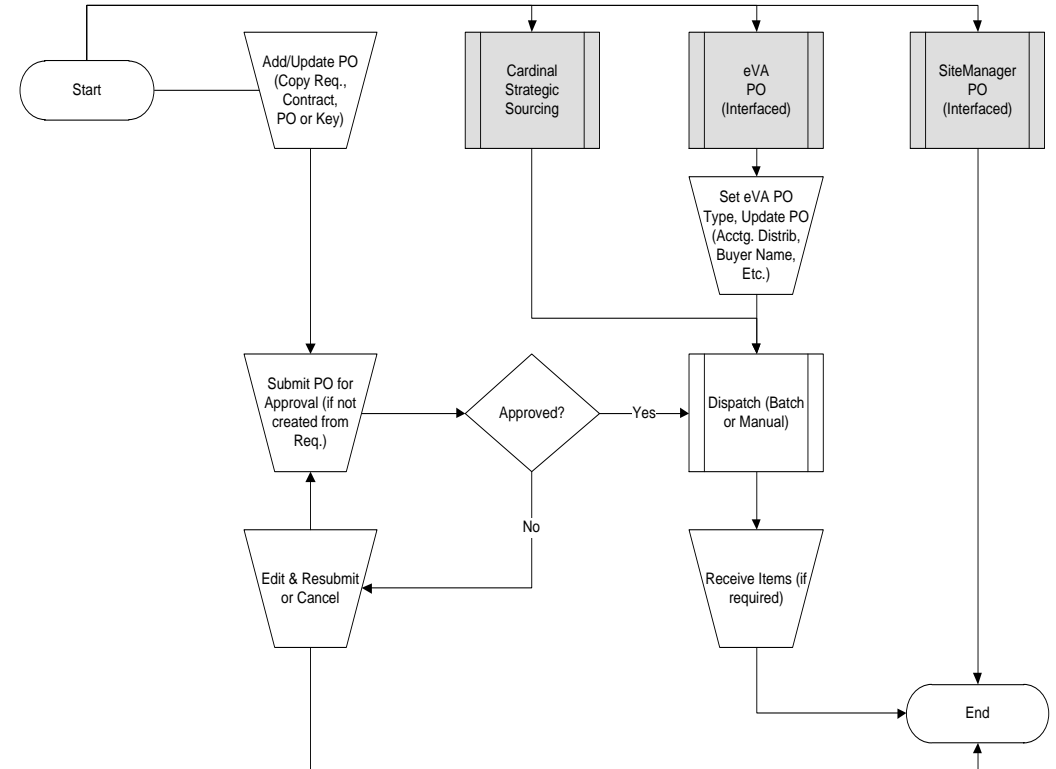
# Purchase Order Process

Using the Purchasing module, a PO can be created online that converts requests for goods and/or services into POs.

As POs proceed from entry to dispatch, Cardinal tracks details and collects analysis information to facilitate future purchases.

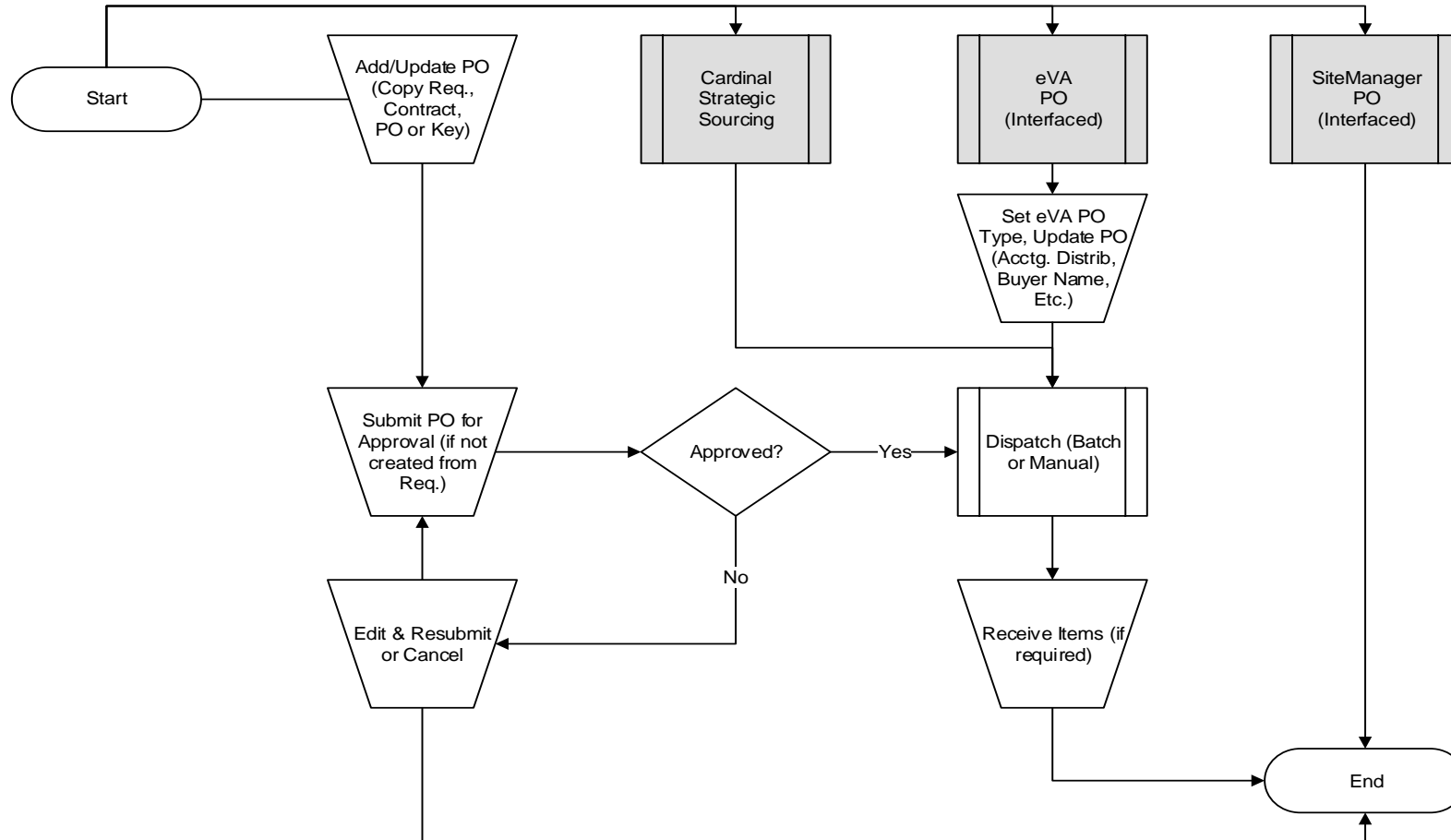
- PO key components include a header, lines, schedules, and distributions.
- A PO is identified by an ID that is unique within a purchasing business unit.
- Cardinal automatically generates a PO ID number.

**Note:** POs keyed into Cardinal, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched. (Only R01 type POs transmit to eVA.)





# Purchase Order Process (continued)



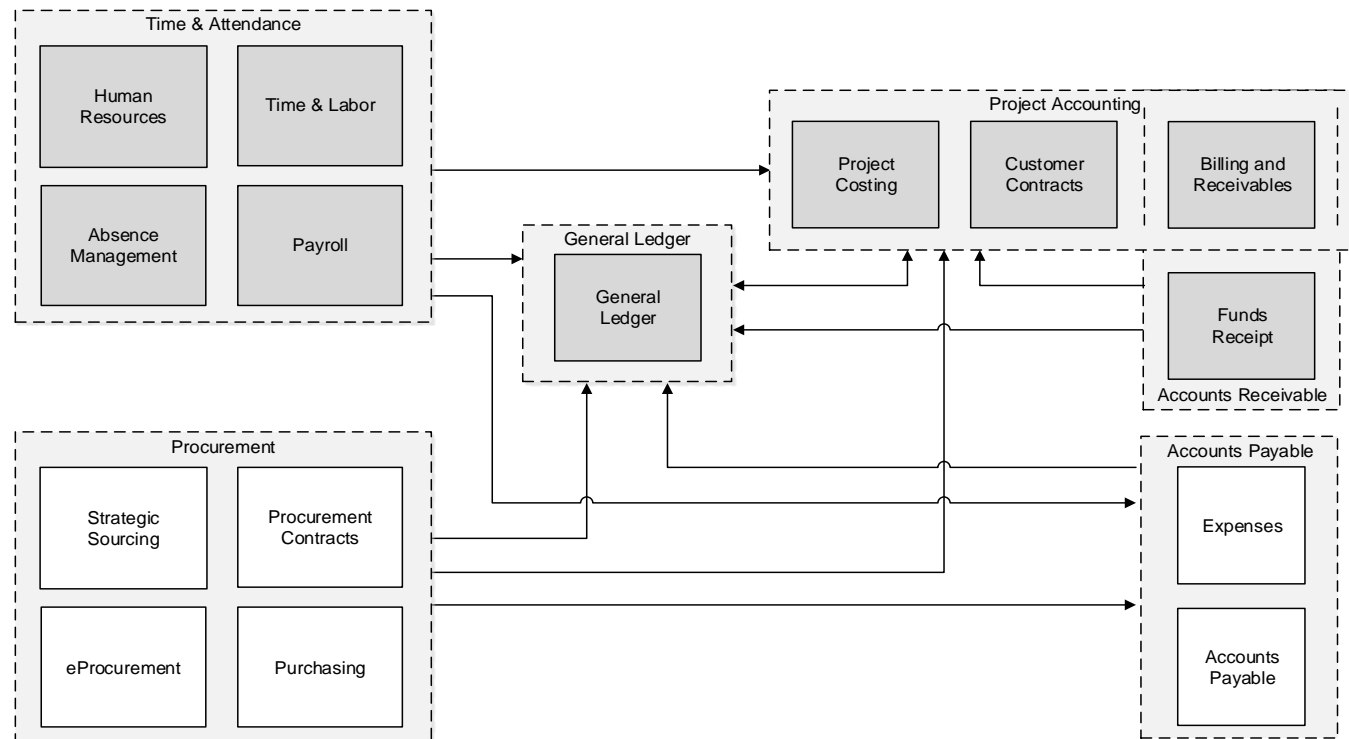
Note: Cardinal POs, Strategic Sourcing POs, and SiteManager POs are interfaced to eVA after being dispatched. (Only R01 type POs transmit to eVA.)



# Integration with Accounts Payable

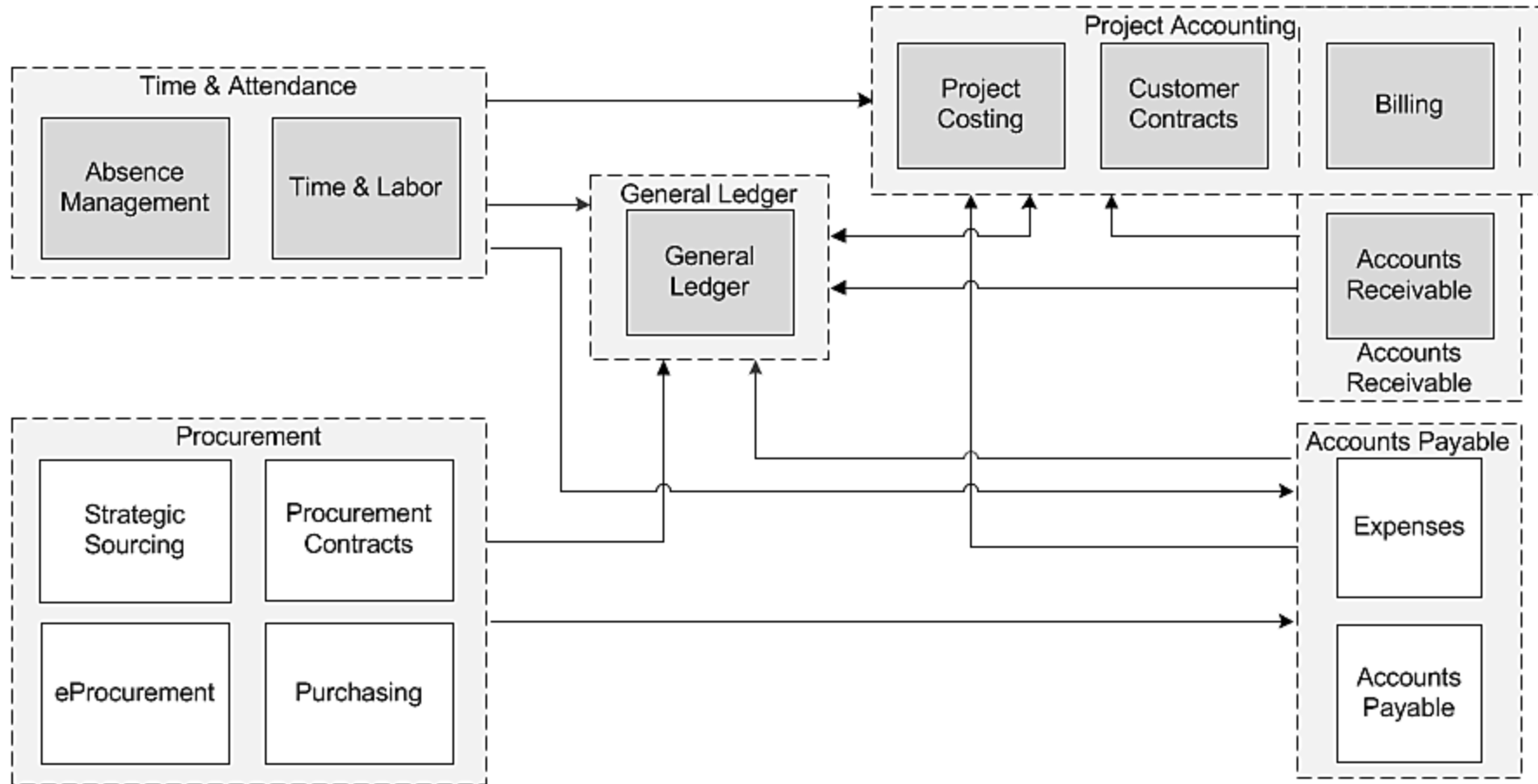
Processing a PO involves the Accounts Payable module in the matching process. Matching ensures that payment is made for what was ordered and received by comparing vouchers with POs and receiving documents.

- **Two-way matching:** For POs that do not require receiving, the PO and voucher are compared. (i.e. professional services and SiteManager).
- **Three-way matching:** For POs that have receiving, the PO, receipt, and voucher are compared.





# Integration with Accounts Payable (continued)

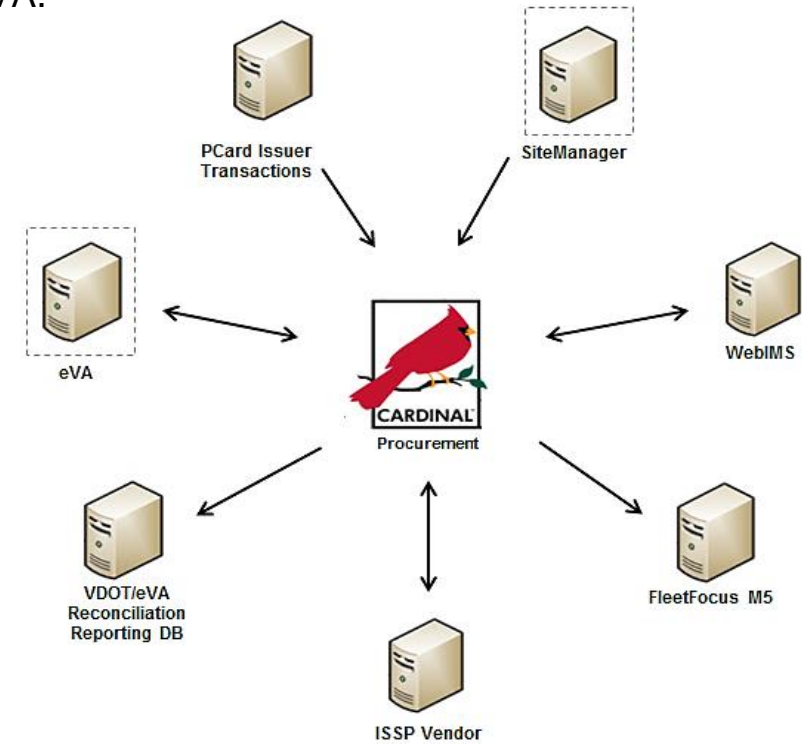




# Interfaces with eVA and SiteManager

The PO process interfaces with eVA:

- POs and change orders that are created in eVA are imported daily from eVA.
- POs and change orders created in Cardinal are exported to eVA. This interface does not send attachments.
- When required, a designated Administrative Services Division (ASD) staff member uploads attachments into eVA.
- In Cardinal only accounting distribution changes can be made to POs that originated in eVA. All other changes to an eVA PO are made in the eVA system and interfaced back into Cardinal.



The PO process interfaces with SiteManager:

- SiteManager sends construction and maintenance contract records to Cardinal, where it is used to create contracts and POs.



# Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. \_\_\_\_\_ is a commitment from an agency to suppliers to purchase goods or services from that supplier.



2. \_\_\_\_\_ are the four components of a purchase order.



3. Who can create a PO?



## Lesson 1: Checkpoint (continued)



4. Who can create a requisition?





# Lesson 1: Summary

1

## Understand Purchase Orders

In this lesson, you learned:

- Processing Purchase Orders
- Purchasing Key Concepts
- Procurement functional areas modules: Purchasing, eProcurement, Strategic Sourcing, and Procurement Contracts
- Change orders are used to add items, increase/decrease quantities, and change prices or ship to values
- How Purchasing integrates with Accounts Payable
- How Purchasing interfaces with eVA and SiteManager



# Lesson 2: Introduction

2

## Processing Purchase Orders

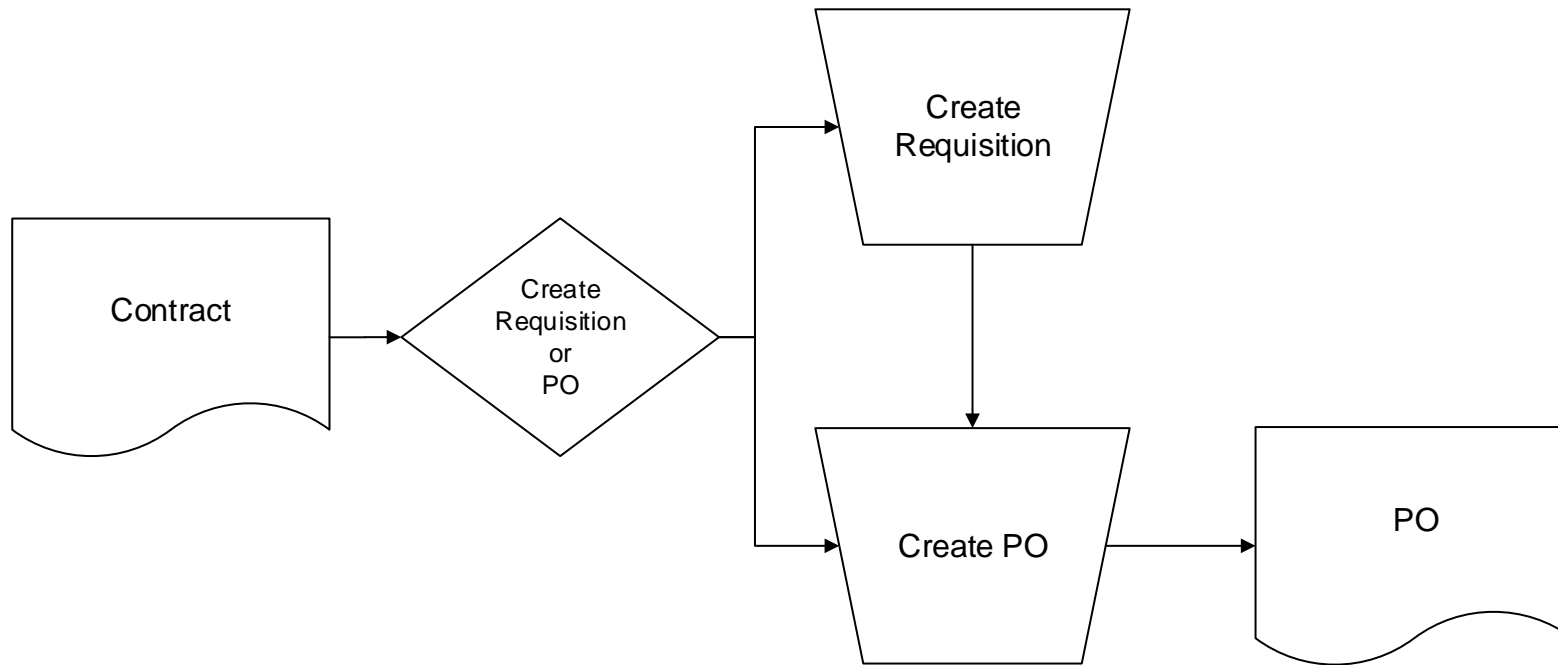
This lesson covers the following topics:

- Purchase Order Basics
- Creating Purchase Orders
- Managing eVA Purchase Orders
- Submitting Purchase Orders for Approval
- Dispatching and Printing Purchase Orders



# Purchase Order Basics

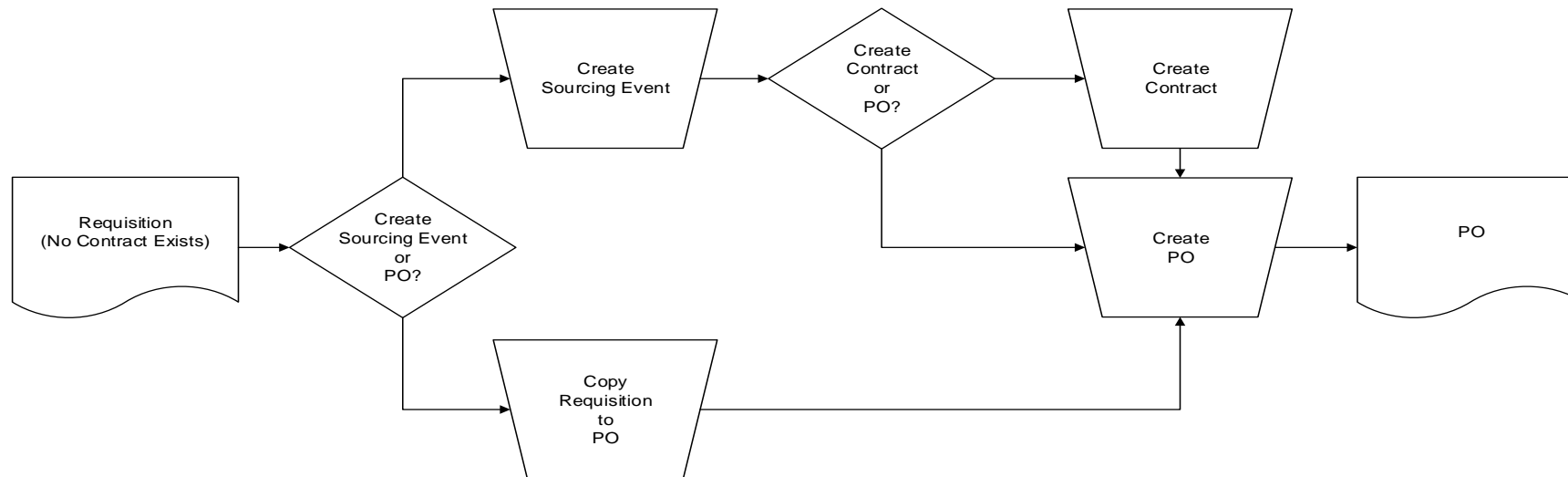
- Purchase Orders (POs) are commitments from an organization to suppliers to purchase goods or services from that supplier. The purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, is listed on the document and is part of the contractual nature of the PO.
- All purchases must have a purchase order, but not all purchase orders need a requisition. If a good or a service is already on contract, a requisition is not generally required. **Exception:** All inventory issue and restock transactions must be done using a requisition.





# Purchase Order Basics (continued)

- When a contract already exists, a requisition is not always necessary. A purchase order can be created against the contract and avoid additional steps.
- When a contract does not exist, the end user has two options after the requisition is created:
  - **Create a Sourcing Event** - Once approved, the requisition goes through a solicitation process, which involves creating a sourcing event. This process allows suppliers to bid against the event. Winning bidders are awarded a contract or purchase order.
  - **Copy the Requisition to Purchase Order** - When the value of goods or services falls within the range of a small purchase, or is otherwise permitted in accordance with the **Agency Procurement and Surplus Property Manual (APSPM)**, the Buyer can copy the requisition directly into the PO, rather than creating a sourcing event and awarding a contract.





# Creating Purchase Orders

There are three ways to create a PO:

- Key directly into Cardinal
- Copying a:
  - Requisition - Use an existing requisition as a template to create a new PO. This creates an electronic link from the PO to the requisition.
  - Purchase order - Copy an existing PO to order the same items.
  - Contract - Copy from an existing contract to save time on data entry. Multiple contracts can be copied into an existing PO.
- Award a Strategic Sourcing event to a PO (i.e. Invitation For Bid).

Navigate to create a PO using the following path:

**Main Menu > Purchasing > Purchase Orders > Add/Update POs**

The screenshot shows the 'Purchase Order' creation interface. At the top is a navigation bar with 'Favorites', 'Main Menu', 'Purchasing', 'Purchase Orders', and 'Add/Update POs'. Below this is the title 'Purchase Order'. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these are input fields for 'Business Unit' (containing '50100') and 'PO ID' (containing 'NEXT'). An 'Add' button is located below the input fields. At the bottom, there is a link 'Find an Existing Value | Add a New Value'.



# Creating Purchase Orders (continued)

Purchase Orders can be set to quantity or to amount only. Using amount only allows for the receipt by invoice amount.

## **Receive by Quantity**

If ordering inventory or items that are specific by count, establish a PO with a predetermined quantity of items at a fixed rate/price per item. Therefore, set your PO to receive based on the quantities delivered or completed.

## **Receive by Amount**

If ordering a service or project that is based on a lump sum, you would establish a PO that allows receiving of the invoice amounts (dollar), not the quantity. Therefore, set the PO to **Amount Only** and receive the invoice amount based on the dollars only.

For more detailed information about creating purchase orders, see the job aid entitled **501 PR344: Purchase Orders** located on the Cardinal website in **Job Aids** under **Training**.



# Creating Purchase Orders (continued)

The first page of the **Purchase Order** opens to the **Add a New Value** tab. The **Business Unit** field defaults to the agency (i.e., **50100** for VDOT) and **PO ID** defaults to **NEXT**. Cardinal will create the **PO ID** number automatically. Do not change the PO ID.

Favorites ▾Main Menu ▾>Purchasing ▾>Purchase Orders ▾>Add/Update POs

### Purchase Order

Find an Existing Value

Add a New Value

Business Unit50100

PO IDNEXT

Add

Find an Existing Value | Add a New Value

# Creating Purchase Orders (continued)

## Purchase Order (PO):

A Purchase Order is composed of several sections, including the **Header**, **Lines**, **Schedule**, and **Distribution** information.




We will also discuss **Supplier Details**, **Header Details**, **PO Defaults**, and **Line Details**.

Options include add, update, and cancel PO lines, as well as correct PO data such as PO lines, quantities, price, distributions, ship to locations, eVA purchase order type, and comments, as needed.


Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs


Maintain Purchase Order


Purchase Order


Business Unit 50100 PO ID 0001195122 PO Status Dispatched   


Copy From  ☐ Hold From Further Processing

Header 

\*PO Date 04/16/2019 

\*Supplier S B COX IN-001 

\*Supplier ID 0000032185 

\*Buyer TERESA.TYLER 

PO Reference Landfill for Stumps and logs

Web IMS?: ☐

Header Details

PO Defaults

PO Activities

Requisitions

Actions

Supplier Details

S B COX Incorporated

Tyler, Teresa (VDOT)

Activity Summary


Edit Comments


Add ShipTo Comments


Document Status


Backorder Status Not Backordered Create BackOrder

Receipt Status Partial


\*Dispatch Method Print  Dispatch

eVA PO Type R01  Routine Bill Vendor

\*eVA Order Method URL 

eVA Interfaced SEVA 

eVA Dttm 04/16/19 4:30:48PM


Amount Summary 

Merchandise 5,000.00


Freight/Tax/Misc. 0.00


Total Amount 5,000.00 USD


Calculate





Add Items From 








Catalog Purchasing Kit Item Search

Select Lines To Display  Search for Lines Line  To  Retrieve

Lines 

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving 

Personalize | Find | View All |   First  1 of 1  Last

| Line | Item  | Description                              | PO Qty   | *UOM     | Category | Price  | Merchandise Amount | Status   |          |   |   |
|------|---|--|--|----------|----------|--------|--------------------|----------|----------|---|---|
| 1    |  684650800 | LANDFILL SERVICES LANDFILL SERVICES, TON |  | 200.0000 | LTN      | 684650 | 25.00000           | 5,000.00 | Approved |  |     |





# Creating Purchase Orders (continued)

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

## Maintain Purchase Order

### Purchase Order

Business Unit 50100 PO ID 0001195122  
Copy From  PO Status Dispatched △ ×  
☐ Hold From Further Processing

▼ Header ?

\*PO Date 04/16/2019 🔍 Supplier Search

\*Supplier S B COX IN-001 Supplier Details

\*Supplier ID 0000032186 S B COX Incorporated

\*Buyer TERESA.TYLER 🔍 Tyler, Teresa (VDOT)

PO Reference Landfill for Stumps and logs

Web IMS?: ☐

Header Details  
PO Defaults  
PO Activities  
Requisitions  
▼ Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Backorder Status Not Backordered Create BackOrder

Receipt Status Partial

\*Dispatch Method Print Dispatch

eVA PO Type R01 🔍 Routine Bill Vendor

\*eVA Order Method URL 🔍

eVA Interfaced SEVA 🔍

eVA Dttm 04/16/19 4:30:48PM

**Amount Summary** ?

|                     |              |                        |
|---------------------|--------------|------------------------|
| Merchandise         | 5,000.00     | <span>Calculate</span> |
| Freight/Tax/Misc.   | 0.00         |                        |
| <b>Total Amount</b> | 5,000.00 USD |                        |

Add Items From ? Catalog Item Search Purchasing Kit

Select Lines To Display ? Search for Lines Line  🔍 To  🔍 Retrieve

Lines ? Personalize | Find | View All | 🔍 | 📄 | 📅 | First | 1 of 1 | Last

| Details | Ship To/Due Date         | Statuses                                 | Item Information        | Attributes | RFQ      | Contract | Receiving          |          |  |
|---------|--------------------------|--|-------------------------|------------|----------|----------|--------------------|----------|--|
| Line    | Item                     | Description                              | PO Qty                  | *UOM       | Category | Price    | Merchandise Amount | Status   |  |
| 1       | <span>📄</span> 884650800 | LANDFILL SERVICES LANDFILL SERVICES, TON | <span>🔍</span> 200.0000 | LTN        | 8884650  | 25.00000 | 5,000.00           | Approved | <span>🗨️</span> <span>📄</span> <span>+</span> <span>-</span> |



# Creating Purchase Orders: Supplier Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Supplier Details** hyperlink displays the **Maintain Purchase Order – Supplier Details** pop-up window. This window allows viewing or editing the supplier **Location**, **Address**, **Contacts**, and payment terms.

For construction and professional services purchase orders, the **Terms** are set to **00 (Due Immediately)** and the **Basis Date Type** is set to **Inv Date**.

For goods and services, the payment terms are set to **30 Days** and **Prompt Payment** type.

|  |                          |                         |
|--|--------------------------|-------------------------|
| PO Supplier Information                  |                          |                         |
| Maintain Purchase Order                  |                          |                         |
| Supplier Details -- S B COX Incorporated |                          |                         |
| Business Unit 50100                      | PO ID 0001195122         | Supplier S B COX IN-001 |
| Supplier Information                     |                          |                         |
| *Location MAIN                           | Terms 30                 | Net 30                  |
| *Address 4                               | Basis Date Type Inv Date |                         |
| Contact                                  | Show Address Details     |                         |
| Salesperson                              | Show Contact Details     |                         |
|  | Show Salesperson Details |                         |
| Supplier Details Message                 |                          |                         |
| Country USA United States                |                          |                         |
| Prefix                                   |                          |                         |
| Address 1 P.O. BOX 7737                  |                          |                         |
| Fax 260/332-7665                         |                          |                         |
| Address 2                                |                          |                         |
| Prefix 1                                 |                          |                         |
| eVA VLIN VA10053587                      |                          |                         |
| Phone 550/276-9275                       |                          |                         |
| eVA Address ID EVAAD74524                |                          |                         |
| City RICHMOND                            |                          |                         |
| County 023899321                         |                          |                         |
| Postal 23231                             |                          |                         |
| State VA Virginia                        |                          |                         |
| OK Cancel Refresh                        |                          |                         |



# Creating Purchase Orders: Header Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Header Details** hyperlink displays the **PO Header Details** pop-up window. This window displays the **Billing Location** which defaulted based on preconfigured Buyer preferences. View or edit the location as necessary.

The **PO Type**, **Currency Code**, and **Tax Exempt ID** should not be changed.

PO Header Details

PO Details

Supplier S B COX IN-001

PO Date 04/16/2019

\*PO Type GEN

\*Billing Location CHSTFD R

Billing Address

Origin ONL

Online

☐ Use One Ship To

Tax Exempt

ID 546001730

Letter of Credit ID

Ship To CHSTFD RES

Currency

Currency Code USD

Exchange Rate Detail

Base Currency USD

Rate Date 01/01/1901

Exchange Rate 1.00000000

Rate Type CRRNT

Process Control Option

☒ Dispatch

Acknowledgements required for Not required

\*Method Print

OK

Cancel

Refresh

26



# Creating Purchase Orders: PO Defaults

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **PO Defaults** hyperlink opens the **Purchase Order Defaults** pop-up window. This window displays the **Ship To** location which defaulted based on preconfigured Buyer preferences. View or edit the location as necessary.

In the **Default Options** section, a **Default** chart of accounts may be set for all line items on the PO or **Override** defaulting values or existing chart of accounts when copying in a PO.

In the **Schedule** section, the **Ship Via** and **Freight Terms Code** default and should generally not be changed.

| Purchase Order Defaults                             |   |
|---|---|
| Business Unit 50100                                 | PO ID 0001195122  |
| Supplier S B COX IN-001                             |   |
| Default Options ?                                   |   |
| <input type="radio"/> Default                       | If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used. |
| <input checked="" type="radio"/> Override           | If you select this option, all default values entered on this page override the default values found in the default hierarchy.  |
| Line  |   |
| Category <input type="text"/>                       | Unit of Measure <input type="text"/>  |
| Schedule  |   |
| Ship To <input type="text"/> Chesterfield Residency | Ultimate Use Code <input type="text"/>  |
| Due Date <input type="text"/>                       | Original Promise Date <input type="text"/>  |
| Ship Via <input type="text"/>                       | Freight Terms Code <input type="text"/>   |
| Arbitration <input type="text"/>                    | Freight Charge Method <input type="text"/>  |
| *Distribute By <input type="text"/>                 | One Time Address  |



# Creating Purchase Orders: Line Details

From the **Maintain Purchase Order – Purchase Order** page, clicking on the **Line Details** icon to the left of each PO line opens the **Details for Line** pop-up window.

This window shows all information related to the PO line on just one page, instead of clicking through the tabs.

Use the **Expand All** hyperlink to expand the page.

In this example, the **Amount Only** checkbox is checked.

Details for Line 1

PO ID 0001195122

Supplier S B COX IN-001

Line 1

Item ID 9884650800

LANDFILL SERVICES LANDFILL SER

Line Details

Category 9884650

Line Status Approved

Description LANDFILL SERVICES

Backorder Status Not

Category ID 27945

Backordered

Amount to Receive 176.000

USD

Quantity to Receive 7.0400

Item Availability

Transaction Item Description

LANDFILL SERVICES LANDFILL SERVICES, TON

Preferred Language Item Description

LANDFILL SERVICES LANDFILL SERVICES, TON

Expand All

Collapse All

Item Information

Supplier's Catalog

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

UPN Type

UPN ID

Replenish Code Standard

Device Tracking

Withholding

Withholding Code

Attributes

Physical Nature Goods

\*Price Qty Schedule Quantity

\*Price Date PO

☒ Amount Only



# Creating Purchase Orders: Line Details (continued)

Details for Line 1

PO ID 0001195122

Supplier S B COX IN-001

Line 1

Item ID 9884650800

LANDFILL SERVICES LANDFILL SER

Line Details

Category 9884650

Description LANDFILL SERVICES

Category ID 27945

Amount to Receive 176.000

Quantity to Receive 7.0400

Item Availability

Line Status Approved

Backorder Status Not

Backordered

Amount Summary

Merchandise Amount 5,000.00

Doc. Base Amt 5,000.00

Transaction Item Description

LANDFILL SERVICES LANDFILL SERVICES, TON

Preferred Language Item Description

LANDFILL SERVICES LANDFILL SERVICES, TON

USD

USD

USD

Expand All

Collapse All

Item Information

Supplier's Catalog

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

UPN Type

UPN ID

Replenish Code Standard

☐ Device Tracking

☐ Withholding

Withholding Code

Attributes

Physical Nature Goods

\*Price Qty Schedule Quantity

\*Price Date PO

☒ Amount Only



# Creating Purchase Orders: Additional Details

After clicking on **Expand All** on the **Maintain Purchase Order – Line Details** page by scrolling down, you can see additional details related to the PO line are displayed.

The screenshot displays the 'Maintain Purchase Order – Line Details' page with several tabs and fields. Red boxes highlight the following areas:

- Attributes** tab: 'Physical Nature' dropdown is set to 'Services'. Other fields include '\*Price Qty' (Line Quantity), '\*Price Date' (Due), and a checked 'Amount Only' checkbox.
- RFQ** tab: 'RFQ ID' and 'Line' fields.
- Contract** tab: 'Contract SetID' is 'STATE', 'Contract ID' is '0000000000000000000045185', 'Contract Version' is '1', 'Contract Line' is '3', 'Category Line Number' is empty, 'Group ID' is 'LOT2', 'Milestone Line' is 'Release 1', and 'Contract Details' link is visible. A 'GPO Contract' tab is also present.
- Receiving** tab: '\*Receiving Required' dropdown is set to 'Required', 'Inspection Required' checkbox is unchecked, and 'Inspect ID' field is empty. A 'Close Short' checkbox is also highlighted.

At the bottom, there are 'OK', 'Cancel', and 'Refresh' buttons.

# Creating Purchase Orders: Copy From

From the **Maintain Purchase Order – Purchase Order** page, create a PO by copying it from an existing document using the **Copy From** drop-down menu.

Favorites ▾Main Menu ▾Purchasing ▾Purchase Orders ▾Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100

PO ID NEXT

PO Status Initial

☐ Hold From Further Processing

Copy From

Contract

Purchase Order

Requisition

▼ Header ?

\*PO Date 11/27/2019

Supplier Search

\*Supplier Supplier Details

\*Supplier ID Supplier Details

\*Buyer DEBBIE.BELL Bell, Debbie (VDOT)

PO Reference

Web IMS?: ☐

Header Details

PO Defaults

PO Activities

▼ Actions

Activity Summary

Add Comments

Add ShipTo Comments

Receipt Status Not Recvd

\*Dispatch Method Dispatch

eVA PO Type R01 Routine Bill Vendor

eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

Amount Summary ?

Merchandise 0.00

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

Calculate

Add Items From ?

Catalog

Purchasing Kit

Item Search

Lines ?

Personalize | Find | View All | 1 of 1 | First | Last

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

...

| Line | Item | Description | PO Qty | UOM | Category | Price | Merchandise Amount | Status |  |  |  |  |
|------|------|-------------|--------|-----|----------|-------|--------------------|--------|--|--|--|--|
| 1    |      |             |        |     |          | 0     | 0.000              | Open   |  |  |  |  |

View Approvals

Close Short All Lines

\*Go to ... More ...

Save

Notify

Refresh

Add

Update/Display

31





# Creating Purchase Orders: Copy From (continued)

Steps to copy from an existing document:

- When copying from a Requisition or Contract, enter the **Supplier ID** first.
- Click the **Copy From** drop-down menu.
- Select the type of document to be copied from (Contract, Purchase Order, or Requisition). The **Copy Purchase Order from Requisition, Purchase Order, or Contract** page will open. When copying from a Contract, copy the entire contract. For more detailed information about copying a single line from a contract, see the job aid entitled **501 PR344: Purchase Orders** located on the Cardinal website in **Job Aids** under **Training**.
- When copying a line from a contract, note that the contract selection displays on one tab. After completing the copy enter the **Contract ID** on the **Maintain Purchase Order – Purchase Order** page in the **Lines** section, **Contract** tab, to associate it to the contract.

The screenshot shows the 'Lines' section of a software application. The 'Contract' tab is selected and highlighted with a red box. The 'Contract ID' field is also highlighted with a red box. The interface includes various tabs like Details, Ship To/Due Date, Statuses, Item Information, Attributes, RFQ, Contract, and Receiving. The main table has columns for Line, Item, Description, SetID, Contract ID, Contract Version, Contract Line, Category Line, Release, Milestone Line, GPO ID, and GPO Contract. The first row shows Line 1 with a search icon in the Item field and a dropdown menu in the Contract ID field. At the bottom, there are buttons for View Approvals, Save, Notify, and Refresh, along with a 'Close Short All Lines' button and a '\*Go to ... More ...' dropdown.



# Creating Purchase Orders: Copy From (continued)

After selecting the type of document to be copied from, a search page appears. The page will be based on the type of document to be copied.

The screenshot displays three overlapping windows in the 'Maintain Purchase Order' application:

- Top Window:** Titled 'Maintain Purchase Order' with a sub-header 'Copy Purchase Order from Requisition'. It includes a 'Return to Main Page' link, a 'Requisition S' dropdown, and a 'Search' button.
- Middle Window:** Titled 'Copy Purchase Order from Purchase Order'. It features a 'PO Selection Criteria' section with fields for 'PO ID', 'Supplier ID', 'Buyer ID', and 'PO Reference'. It also has a 'Search' button.
- Bottom Window:** Titled 'Copy Purchase Order from Contract'. It contains a 'Contract Selection Criteria' section with fields for 'Contract SetID', 'Contract ID', 'Supplier' (set to 'S B COX IN-001'), 'Supplier ID' (set to '0000032186'), and 'Master Contract'. There is an 'Allow Open Item Contract Only' checkbox and a 'Search' button. Below this is a 'Select Contract' section with tabs for 'Contracts' and 'More Details'. The 'Contracts' tab is active, showing a table with columns: 'Select', 'SetID', 'Contract', 'Description', 'Supplier ID', and 'Begin Date'. The table currently has one row with a checkbox in the 'Select' column. At the bottom are 'OK', 'Cancel', and 'Refresh' buttons.



# Creating Purchase Orders: Copy From (continued)

Enter search criteria as required in the Selection Criteria section of the page and click the **Search** button.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit50100

Supplier ID0000033093

Category

Requisition ID0002270245

Requisition Name

Contract ID

Buyer

Origin

Max Rows20

☒ Include Reqs With No Supplier

☒ Include Inventory Items

☐ Exclude Auto Source Item

Search

Select Requisition Lines

Personalize | Find | View All | First 1-2 of 2 Last

| Sourcing                 | Requisitions | Contract Information | Item Substitution |        |      |                                |            |      |                  |            |                |  |
|--------------------------|--------------|----------------------|-------------------|--------|------|--------------------------------|------------|------|------------------|------------|----------------|--|
| Select                   | Catalog Item | *Supplier            | PO Qty            | PO UOM | Item | Description                    | Req ID     | Line | Procurement Card | Calc Price | Schedule Split |  |
| <input type="checkbox"/> |              | <input type="text"/> | 114.0000          | TNE    |      | BITUMINOUS ASPHALT TYPE SM 9.5 | 0002270245 | 1    |                  | N          |                |  |
| <input type="checkbox"/> |              | <input type="text"/> | 3520.0000         | YDK    |      | FLEXIBLE PAVEMENT PLANNING (MI | 0002270245 | 2    |                  | N          |                |  |

☒ Select All ☐ Clear All

Copy To PO

Save

Notify

Refresh

Add

Update/Display



# Creating Purchase Orders: Copy From (continued)

Click the **Search** button and the items matching search criteria appear in the list at the bottom of the page. Review the items and click the checkbox in the **Select** column for each item to be copied. Multiple items, such as multiple lines can be copied, if desired.

After selecting the items to be copied, click the **Copy to PO** button.

Favorites ▾Main Menu ▾Purchasing ▾Purchase Orders ▾Add/Update POs

Maintain Purchase Order

Copy Purchase Order from Requisition

[Return to Main Page](#)

Requisition Selection Criteria

Business Unit50100

Supplier ID0000033093

Category

Requisition ID0002270245

Requisition Name

Contract ID

Search

Buyer

Origin

Max Rows20

☒ Include Reqs With No Supplier

☒ Include Inventory Items

☐ Exclude Auto Source Item

Select Requisition Lines

Personalize | Find | View All |

First 1-2 of 2 Last

| Select                              | Catalog Item | *Supplier            | PO Qty    | PO UOM | Item | Description                    | Req ID     | Line | Procurement Card | Calc Price | Schedule Split |
|-------------------------------------|--------------|----------------------|-----------|--------|------|--------------------------------|------------|------|------------------|------------|----------------|
| <input checked="" type="checkbox"/> |              | <input type="text"/> | 114.0000  | TNE    |      | BITUMINOUS ASPHALT TYPE SM 9.5 | 0002270245 | 1    |                  | N          |                |
| <input type="checkbox"/>            |              | <input type="text"/> | 3520.0000 | YDK    |      | FLEXIBLE PAVEMENT PLANNING (MI | 0002270245 | 2    |                  | N          |                |

☒ Select All ☐ Clear All

Copy To PO

SaveNotifyRefresh

AddUpdate/Display



# Creating Purchase Orders: Copy From (continued)

The **Purchase Order** page displays with the item(s) selected.

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

## Purchase Order

Business Unit 50100 PO ID NEXT PO Status Initial

Copy From  ☐ Hold From Further Processing

**Header** ?

\*PO Date 11/08/2019 Supplier Search  
\*Supplier LL CARTER -003 Supplier Details  
\*Supplier ID 0000033093 LL Carter & Son Inc  
\*Buyer   
PO Reference   
Web IMS?: ☐

Receipt Status Not Recvd  
\*Dispatch Method Print Dispatch  
eVA PO Type R01 Routine Bill Vendor  
\*eVA Order Method PRNT  
eVA Interfaced NSEV  
eVA Dttm

Header Details Activity Summary  
PO Defaults Edit Comments  
PO Activities Add ShipTo Comments  
Actions

**Amount Summary** ?

|                   |               |           |
|-------------------|---------------|-----------|
| Merchandise       | 44,140.80     | Calculate |
| Freight/Tax/Misc. | 0.00          |           |
| Total Amount      | 44,140.80 USD |           |

**Add Items From** ?

Catalog Item Search  
Purchasing Kit

**Lines** ? Personalize | Find | View All | First 1 of 1 Last

| Line | Item                 | Description | PO Qty   | *UOM | Category             | Price     | Merchandise Amount | Status |
|------|----------------------|-------------|----------|------|----------------------|-----------|--------------------|--------|
| 1    | <input type="text"/> | BITUMINOUS  | 114.0000 | TNE  | <input type="text"/> | 387.20000 | 44,140.80          | Open   |

View Approvals Close Short All Lines \*Go to ... More ...

Save Notify Refresh Add Update/Display



# Creating Purchase Orders: Copy From (continued)

After copying the existing document information into the PO, some information may need to be added or changed, such as:

- Update the **Buyer**
- Date values which default and are not copied into the PO
- Shipping and freight information that defaulted from the copied document
- Schedule and distribution that defaulted from the copied document
- Enter the **Quantity** or **Amount**

Note: When copying from a contract, note that the contract selection displays on one tab. The contract number can be entered on the PO line to associate it to the contract.

After updating the fields as needed, click **Save** and a new PO is created. A **PO ID** is generated by Cardinal.



# Creating Purchase Orders: Items

Once the **PO Header** section is complete, if needed, additional line items may be associated with the PO.

## To Add New Lines

- The **Lines** section contains links that allow selection of items for the PO. Items can be selected or added by:
  - Key in, or look up, the National Institute of Governmental Purchasing (NIGP) Item number, i.e., **Item**. This is the most common method to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier you previously selected. The **UOM** and **Description** field values default from the item table.
  - Key in or look up the NIGP Category, i.e. **Category**. On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. Complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

The screenshot displays the 'Maintain Purchase Order' interface. The 'Header' section includes fields for Business Unit (50100), PO ID (NEXT), PO Status (Initial), and a 'Copy From' dropdown. It also features search fields for PO Date (11/08/2019), Supplier (LL CARTER -003), Supplier ID (0000033093), and Buyer. The 'Amount Summary' section shows Merchandise (44,140.80), Freight/Tax/Misc. (0.00), and Total Amount (44,140.80 USD). The 'Lines' section at the bottom shows a table with columns for Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, and Status. The first line is highlighted, showing Item 1, Description BITUMINOUS, PO Qty 114.0000, UOM TNE, Category 5503376, Price 387.20000, Merchandise Amount 44,140.80, and Status Open. The 'Item' and 'Category' fields in the first line are highlighted with red boxes.



# Creating Purchase Orders: Items (continued)

Close short processing is not used. Do not use the **Close Short All Lines** button.

The accounting distribution can be accessed from the **Maintain Purchase Orders – Purchase Order** page by clicking the **Schedule** icon. From the **Schedules** page, click the **Distributions/ChartFields** icon.

Lines ? Personalize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

| Line | Item | Description | PO Qty   | *UOM | Category | Price     | Merchandise Amount | Status |  |  |  |
|------|------|-------------|----------|------|----------|-----------|--------------------|--------|--|--|--|
| 1    |      | BITUMINOUS  | 114.0000 | TNE  | 5503376  | 387.20000 | 44,140.80          | Open   |  |  |  |

View Approvals

Close Short All Lines

\*Go to ... More ...

Save Notify Refresh Add Update/Display

Favorites Main Menu > Purchasing > Purchase Orders > Add/Update POs

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Initial  
PO ID NEXT PO Date 11/08/2019

Return to Main Page

Lines Find | View All First 1 of 1 Last

| Line   | Item                           | PO Qty   | Merchandise Amt |
|--------|--------------------------------|----------|-----------------|
| Line 1 | BITUMINOUS ASPHALT TYPE SM 9.5 | 114.0000 | 44,140.80 USD   |

Schedules Personalize | Find | View All | First 1 of 1 Last

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV

| Sched | Schedule Details | *Due Date  | *Ship To  | Ship To Address | *PO Qty  | Price     | Merchandise Amount | Status | Price Adjustment | Miscellaneous Charges | Sched Sales/Use Tax | Distributions/ChartFields |
|-------|------------------|------------|-----------|-----------------|----------|-----------|--------------------|--------|------------------|-----------------------|---------------------|---------------------------|
| 1     |                  | 11/08/2019 | SALEM MAN |                 | 114.0000 | 387.20000 | 44,140.80          | Active |                  |                       |                     |                           |

Add ShipTo Comments

Save Notify Refresh Add Update/Display





# Creating Purchase Orders - Items (continued)

Favorites ▾Main Menu ▾Purchasing ▾Purchase Orders ▾Add/Update POs

Maintain Purchase OrderPurchase Order

Business Unit 50100PO ID NEXTPO Status Initial

Copy From ▾☐ Hold From Further Processing

Header ?

\*PO Date 11/08/201931Supplier Search

\*Supplier L L CARTER -003Supplier Details

\*Supplier ID 0000033093LL Carter & Son Inc

\*Buyer

PO Reference

Web IMS?: ☐

Header DetailsPO DefaultsPO ActivitiesActions

Activity SummaryEdit CommentsAdd ShipTo Comments

Receipt Status Not Recvd

\*Dispatch Method PrintDispatch

eVA PO Type R01Routine Bill Vendor

\*eVA Order Method PRNTEVA Interfaced NSEVEVA Dttm

Amount Summary ?

Merchandise 44,140.80

Freight/Tax/Misc. 0.00Calculate

Total Amount 44,140.80 USD






Add Items From ?

CatalogItem SearchPurchasing Kit

Lines ?

Personalize | Find | View All | First 1 of 1 Last

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

| Line | Item  | Description                     | PO Qty   | *UOM | Category | Price     | Merchandise Amount | Status |   |   |   |   |
|------|---|---------------------------------|----------|------|----------|-----------|--------------------|--------|---|---|---|---|
| 1    |  | <input type="text"/> BITUMINOUS | 114.0000 | TNE  | 5503376  | 387.20000 | 44,140.80          | Open   |  |  |  |  |

View ApprovalsClose Short All Lines\*Go to ... More ...

SaveNotifyRefreshAddUpdate/Display



# Creating Purchase Orders: Distributions

A schedule may have one or more accounting distributions. ChartField values determine what fund, account, department, etc. the schedule amount is charged to. If a PO line needs to use multiple SpeedCharts, click on the **Multi-SpeedCharts** link and split as necessary.

Do not split or add additional schedules for a PO line. There should be only one schedule per PO line.

Distributions for Schedule 1

Unit 50100  
PO ID NEXT  
Line 1  
Schedule 1

Supplier LL CARTER -003  
Item  
Status Active

BITUMINOUS ASPHALT TYPE SM 9.5

\*Distribute By Quantity

Schedule Qty 114.0000  
Merchandise Amount 44,140.80 USD  
Doc. Base Amount 44,140.80 USD

SpeedChart 

Multi-SpeedCharts

Distribution

Personalize | Find | View All | First 1 of 1 Last

Chartfields

Details/Tax

Asset Information

Req Detail

Statuses

| Dist | Status | Percent  | PO Qty   | Merchandise Amount | Currency | *GL Unit | Entry Event | *Account | Fund  | Program | Department |
|------|--------|----------|----------|--------------------|----------|----------|-------------|----------|-------|---------|------------|
| 1    | Open   | 100.0000 | 114.0000 | 44,140.80          | USD      | 50100    |             | 5012550  | 04100 | 604001  | 12096      |

OK

Cancel

Refresh



# Creating Purchase Orders: Distributions (continued)

**Distributions for Schedule 1**

Unit 50100  
PO ID NEXT  
Line 1  
Schedule 1

Supplier LL CARTER -003  
Item  
Status Active

BITUMINOUS ASPHALT TYPE SM 9.5

\*Distribute By Quantity

Schedule Qty 114.0000  
Merchandise Amount 44,140.80 USD  
Doc. Base Amount 44,140.80 USD

SpeedChart Multi-SpeedCharts

**Distribution**  
Chartfields Details/Tax Asset Information Req Detail Statuses

Personalize | Find | View All | First 1 of 1 Last

| Dist | Status | Percent  | PO Qty   | Merchandise Amount | Currency | *GL Unit | Entry Event | *Account | Fund  | Program | Department |
|------|--------|----------|----------|--------------------|----------|----------|-------------|----------|-------|---------|------------|
| 1    | Open   | 100.0000 | 114.0000 | 44,140.80          | USD      | 50100    |             | 5012550  | 04100 | 604001  | 12096      |

OK Cancel Refresh



# Creating Purchase Orders: Send for Approval

After updating the fields, return to the **Maintain Purchase Order – Purchase Order** page, click **Save**, and the PO is saved. A **PO ID** value will be generated. The final step is to send the PO forward for supervisor approval.

- Click the **PO Approval** checkmark. The checkmark will disappear and the words **Pend Appr** will appear.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase OrderPurchase Order

Business Unit 50100PO ID 0001201103Copy From

PO Status Open

✓

✗

☐ Hold From Further Processing

▼ Header ?

\*PO Date11/08/201931Supplier Search

\*SupplierLL CARTER -003Supplier Details

\*Supplier ID0000033093LL Carter & Son Inc

\*BuyerCAROLINE.BUMBERBumbera, Caroline C. (VDOT)

PO ReferenceStone

Web IMS?: ☐

Header DetailsPO DefaultsPO ActivitiesRequisitionsActions

Activity SummaryEdit CommentsAdd ShipTo Comments

Receipt StatusNot Recvd

\*Dispatch MethodPrintDispatch

eVA PO TypeR01Routine Bill Vendor

\*eVA Order MethodPRNT

eVA InterfacedNSEV

eVA Dttm

Amount Summary ?

Merchandise44,140.80

Freight/Tax/Misc.0.00

Total Amount44,140.80 USD

Calculate

PO Status Pend Appr

43



# Simulation: Creating a Purchase Order/Ad-Hoc

You will now view a simulation that demonstrates how to **Create a Purchase Order/Ad-Hoc**.





# Managing eVA Purchase Orders

eVA Direct Orders (DOs) are loaded directly into Cardinal, where corresponding purchase orders are created. This allows for receiving and vouchering to occur.

The end user must update the PO with a valid Chart of Accounts and Buyer name.

Important PO field information includes:

- **PO ID** - When an eVA PO is loaded into Cardinal, it is assigned a **PO ID**.
- **Purchase Order Reference** - The eVA PO number is loaded into the **Purchase Order Reference** field, which can be used to search for the PO.
- **Buyer** - The **Buyer** name assigned to the PO is **EVA BUYER** when the PO is first loaded. The **Buyer** should update this name to their own name.

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

### Purchase Order

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Business Unit = ▾ 50100 🔍

**PO ID** begins with ▾ 🔍

Purchase Order Date = ▾ 🔍

PO Status = ▾ ▾

Short Supplier Name begins with ▾ 🔍

Supplier ID begins with ▾ 🔍

Supplier Name begins with ▾ 🔍

**Buyer** begins with ▾ 🔍

Buyer Name begins with ▾ 🔍

PO Type = ▾ ▾

**Purchase Order Reference** begins with ▾ 🔍

Hold From Further Processing ☐

☐ Case Sensitive

Limit the number of results to (up to 300): 300

[Search](#) [Clear](#) [Basic Search](#) 🔍 [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)



# Managing eVA Purchase Orders (continued)

Changing the **Buyer** value prompts a message to appear, asking if the default **Ship To**, **Department ID**, **Location**, and **Origin** values should be changed. Click **Cancel** to maintain the prior default values.

Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

---

Maintain Purchase Order

### Purchase Order

Business Unit 50100 PO ID 0001143973 PO Status Dispatched ▲ ✖

Copy From ▾ ☐ Hold From Further Processing

▼ Header ?

\*PO Date 08/16/2016 31 Supplier Search

\*Supplier VCE INC-001 Backorder Status Not Backordered [Create BackOrder](#)

\*Supplier ID 0000054786 Supplier De VCE INC

\*Buyer 🔍 Altman, Kar

PO Reference

Web IMS?: ☐

[Header Details](#) [Activity Sum](#)

[PO Defaults](#) [Edit Comme](#)

[PO Activities](#) [Add ShipTo](#)

[Requisitions](#) [Document S](#)

▼ Actions

**Message**

Changing Buyer will change the default values ShipTo ID to NOVA TFO Dept ID to 19011 Location to NOVA TFO Origin to ONL, continue to retrofit the default values? (10200,290)

Changing Buyer will change the default values. Press OK to continue retrofit all new default values to schedules and distributions. Press Cancel to retain the original ShipTo, Department ID, Location and Origin.

|                   |        |  |
|-------------------|--------|--|
| Merchandise       | 208.00 |  |
| Freight/Tax/Misc. | 0.00   | <input type="button" value="Calculate"/> |
| Total Amount      | 208.00 | USD                                      |



# Managing eVA Purchase Orders (continued)

To complete the PO, the **Buyer** must enter the accounting distribution for each line on the PO. Click the **PO Defaults** link to enter the accounting distribution for all lines. Or, update the distributions for each PO line one at a time by clicking on the **Schedule** icon at the end of each PO line and then clicking on the **Distribution** icon at the end of the schedule line.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100PO ID 0001143973

Copy From  PO Status Dispatched △ ×

☐ Hold From Further Processing

▼ Header ?

\*PO Date 08/16/2016 31

\*Supplier VCE INC-001

\*Supplier ID 0000054786

\*Buyer CAROLINE.BUMBER 🔍

PO Reference

Web IMS?: ☐

Header Details

**PO Defaults**

PO Activities

Requisitions

▼ Actions

Supplier Search

Supplier Details

VCE INC

Bumbera, Caroline C. (VDOT)

Activity Summary

Edit Comments

Add ShipTo Comments

Document Status

Backorder Status Not Backordered Create BackOrder

Receipt Status Received

\*Dispatch Method Print ▼ Dispatch

eVA PO Type R01 🔍 Routine Bill Vendor

\*eVA Order Method PRNT 🔍

eVA Interfaced SEVA 🔍

eVA Dttm 08/17/16 9:00:35AM

Amount Summary ?

Merchandise 208.00

Freight/Tax/Misc. 0.00

Total Amount 208.00 USD

Calculate





# Managing eVA Purchase Orders (continued)

Favorites ▾

Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs



Maintain Purchase Order

Purchase Order

Business Unit 50100


PO ID 0001143973

Copy From

PO Status Dispatched  

☐ Hold From Further Processing

▼ Header ?

\*PO Date 08/16/2016 


Supplier Search

\*Supplier VCE INC-001

Supplier Details

\*Supplier ID 0000054786

VCE INC

\*Buyer CAROLINE.BUMBER 

Bumbera, Caroline C. (VDOT)

PO Reference

Web IMS?: ☐

Header Details

PO Defaults

PO Activities

Requisitions

▼ Actions

Activity Summary

Edit Comments

Add ShipTo Comments

Document Status


Backorder Status Not Backordered

Create BackOrder


Receipt Status Received


\*Dispatch Method Print

Dispatch

eVA PO Type R01 

Routine Bill Vendor

\*eVA Order Method PRNT 

eVA Interfaced SEVA 

eVA Dttm 08/17/16 9:00:35AM

Amount Summary ?

Merchandise 208.00

Freight/Tax/Misc. 0.00

Total Amount 208.00 USD

Calculate



# Managing eVA Purchase Orders: PO Defaults

Enter the accounting distribution for all PO lines by entering the information on the **Maintain Purchase Order - Purchase Order Defaults** pop-up window. Click **OK**. The **Maintain Purchase Order - Retrofit** field changes to "all" existing PO lines/schedules/distributions..... page will open.

Purchase Order Defaults

Business Unit 50100PO ID 0001143973Supplier VCE INC-001

Default Options ?

☐ Default

If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override

If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

Category Unit of Measure

Schedule

Ship To NOVA TFO

NOVA Traffic Field Ops (Ship)

Ultimate Use Code

Due Date

Original Promise Date

Ship Via COMMON

Freight Terms Code FOB DEST

Arbitration

Freight Charge Method

\*Distribute By Quantity

One Time Address

Distribution

SpeedChart

Distributions

Personalize | Find | View All | First 1 of 1 Last

Chartfields Asset Information

| Dist | Percent  | GL Unit | Entry Event | Account | Fund  | Program | Department | Cost Center |
|------|----------|---------|-------------|---------|-------|---------|------------|-------------|
| 1    | 100.0000 | 50100   |             | 5013120 | 04100 | 699001  | 19011      | 11120010    |

OKCancelRefresh



# Managing eVA Purchase Orders: Distributions

On the **Maintain Purchase Order - Retrofit** field changes to "all" existing PO lines/schedules/distributions..... pop-up:

- Select the **Apply to All Distributions** checkbox next to all ChartField values to be applied to all distributions lines.
- If a value cannot be selected to **Apply to All Distributions**, be sure to Click the **Apply** checkbox to include it.
- Click **OK**.

**PO Default Retrofit**

**Maintain Purchase Order**

**Retrofit field changes to "all" existing PO lines/schedules/distributions.....**

Business Unit 50100      PO ID 0001143973      Supplier VCE INC-001

For Line and Schedule defaults, Select 'Apply' to apply changes to all lines and schedules.  
For Distribution defaults, Select 'Apply' to apply changes to the Distrib Line.  
Example: If you select 'Apply' for Distrib Line 3, the change is applied to each Distrib Line 3 on the PO.  
Select 'Apply to All Distributions' to apply changes to all distribution lines on the PO.

**Retrofit Field Selection**      Personalize | Find | View All | [Icons]      First 1-3 of 3 Last

| Apply                               | Distrib Line | Field Name | Field Value | Apply to All Distributions          |
|-------------------------------------|--------------|------------|-------------|-------------------------------------|
| <input checked="" type="checkbox"/> |              | Ship To    | NOVA TFO    |                                     |
| <input type="checkbox"/>            | 1            | Department | 19011       | <input checked="" type="checkbox"/> |
| <input type="checkbox"/>            | 1            | Location   | NOVA TFO    | <input checked="" type="checkbox"/> |

☒ Select All    ☐ Clear All

**OK**    Cancel    Refresh



# Managing eVA Purchase Orders: Distributions (continued)

Once the distribution values have been added:

- Deselect the **Hold From Further Processing** checkbox.
- Click **Save**.

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

---

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 0001143973 PO Status Approved ▲ ✖

Change Order 1 Current Change Reason

Copy From ▾

☐ Hold From Further Processing

▼ Header ?

\*PO Date 08/16/2016 Supplier Search

\*Supplier VCE INC-001 Supplier Details

\*Supplier ID 0000054786 VCE INC

\*Buyer CAROLINE.BUMBER Bumbera, Caroline C. (VDOT)

PO Reference

Web IMS?: ☐

Header Details Activity Summary  
PO Defaults Edit Comments  
PO Activities Add ShipTo Comments  
Requisitions Document Status  
Actions

Backorder Status Not Backordered Create BackOrder

Receipt Status Received

\*Dispatch Method Print Dispatch

eVA PO Type R01 Routine Bill Vendor

\*eVA Order Method PRNT

eVA Interfaced RSEV

eVA Dttm 08/17/16 9:00:35AM

Amount Summary ?

Merchandise 208.00 Calculate

Freight/Tax/Misc. 0.00

Total Amount 208.00 USD

Add Items From ?

Catalog Item Search

Purchasing Kit

Select Lines To Display ?

Search for Lines Line ▢ To ▢ Retrieve

Lines ?

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving Personalize Find View All 1-2 of 2 Last

| Line | Item       | Description   | PO Qty | *UOM | Category | Price    | Merchandise Amount | Status   |  |  |  |
|------|------------|---|--------|------|----------|----------|--------------------|----------|--|--|--|
| 1    | 3501001000 | BANNERS, PENNANTS, AND DECORATIVE FANS, DRAPES, AND PULL DOW BANNERS, PENNANTS, AND DECORATIVE FANS, DRAPES, AND PULL DOW | 2.0000 | EA   | 3501001  | 96.00000 | 192.00             | Approved |  |  |  |
| 2    | 9622401000 | COURIER/DELIVERY SERVICES (INCLUDING AIR COURIER SERVICES) COURIER/DELIVERY SERVICES (INCLUDING AIR COURIER SERVICES)     | 2.0000 | HUR  | 9622401  | 8.00000  | 16.00              | Approved |  |  |  |

View Approvals Close Short All Lines \*Go to ... More ...

Save Return to Search Notify Refresh Add Update/Display



# Managing eVA Purchase Orders (continued)

eVA Direct Orders (DOs) come into Cardinal with an **Approved** status. Material modifications (such as adding a line, changing quantities or prices, etc.) made to an eVA PO are not done in Cardinal.

When changes are required, they must be performed on the PO in eVA, and then the PO change order will be interfaced back to Cardinal.

A dispatched PO flows to eVA for reporting purposes. If the supplier is set up in eVA as **URL** dispatch, the PO is sent electronically to the supplier. If not, the Buyer should print the PO and send it to the supplier.

Dispatching POs is discussed later in the course.

Maintain Purchase Order

Purchase Order

Business Unit 50100 PO ID 0001049199 PO Status Approved

Copy From  ☐ Hold From Further Processing

**Header**

\*PO Date 11/08/2012 Supplier Search

\*Supplier JAMES RIVER SO Supplier Details

\*Supplier ID 0000015978 James River Solutions

\*Buyer EVA.BUYER

PO Reference DO1541928

Web IMS: ☐

Receipt Status Not Recvd

\*Dispatch Method Phone Dispatch

eVA PO Type EVP eVA Purchase Order

\*eVA Order Method EXCP

eVA Interfaced Y

eVA Dttm 11/09/12 7:04:16AM

eVA PO ID DO1541928

**Amount Summary**

Merchandise 0.00 Calculate

Freight/Tax/Misc. 0.00

Total Amount 0.00 USD

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines Line  To  Retrieve

**Lines**

Personalize Find View All First 1-2 of 2 Last

| Line | Item       | Description          | PO Qty    | *UOM | Category | Price   | Merchandise Amount | Status   |  |  |  |
|------|------------|----------------------|-----------|------|----------|---------|--------------------|----------|--|--|--|
| 1    | 4050935800 | 7500gal Premium ULSD | 7500.0000 | 1G   | 4050935  | 3.47400 | 26,055.00          | Canceled |  |  |  |
| 2    | 4050935820 | LUST, OIL SPILL, &   | 7500.0000 | 1G   | 4050935  | 0.00890 | 66.75              | Canceled |  |  |  |

Close Short All Lines \*Go to ... More ...

View Approvals

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display



# Submitting Purchase Orders for Approval

POs created without a requisition require an approval.

POs created from a requisition or awarded from a Strategic Sourcing event are built with an approved status, since they have already been approved.

POs interfaced from eVA are loaded with an approved status, since the POs were created in eVA and have already been approved.



# Submitting Purchase Orders for Approval (continued)

Email notifications, with links to worklists items, are sent to Supervisors as a notification that POs require approval.

Supervisors are also notified via their worklists in Cardinal. From their worklists, Supervisors can click the link next to the PO that requires approval. This link takes them to the Purchase Order Approval page, where they can Approve, Deny, or Hold the PO. The Supervisor clicks the desired button at the bottom of the page to approve, hold, or deny the PO. If the Supervisor denies the PO, it is routed back to the Buyer to be updated or cancelled.

Cardinal sends a reminder email if the PO is not worked within 24 hours. POs must be approved within 48 hours, or the PO is routed to the Supervisor's Supervisor.

For more detailed information about PO approvals, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Training**.

Purchase Order Approval

Business Unit 50100  
PO ID 0001143552  
PO Total 3,123.75 USD  
Supplier ID 0000033093 LL Carter & Son Inc  
Buyer GEORGE MASON  
PO Reference Stone  
Edit PO

PO Status Pend Appr  
PO Date 01/07/2017  
Justification No justification entered by buyer.

Review Lines

Line Details

| Select                   | Line | Item Description   | Quantity | UOM | Price    | Merchandise Amount | Currency | Original Substituted Item | Description |
|--------------------------|------|--------------------|----------|-----|----------|--------------------|----------|---------------------------|-------------|
| <input type="checkbox"/> | 1    | STONE NO. 1, STONE | 125.0000 | LTN | 24.95000 | 3,123.75           | USD      |                           |             |

Select All Clear All View Lines Details

Review / Edit Approvers

PO/CO for Supervisor Action

Purchase Order 0001143552: Pending Start New Path

Buyer Supervisor No Req

Pending

MORGAN, JP  
Buyer's Supervisor

Approval Comments

Approve Hold Deny

Return to Worklist



# Dispatching and Printing Purchase Orders

Approved POs must be dispatched. A dispatched PO sets flags so the PO can be received and vouchered against. Dispatching a PO does not send the PO to the supplier.

Dispatching the PO involves either the Buyer running the PO Dispatch process from the **Maintain Purchase Order - Purchase Order** page or letting the batch process automatically dispatch the PO.

A dispatched PO flows to eVA for reporting purposes. If the supplier is set up in eVA as **URL** dispatch, the PO is sent electronically to the supplier. If not, the Buyer should print the PO and send it to the supplier.

This process involves the following steps:

- PO Dispatch is a batch process that runs throughout the day.
- The status of the PO changes to **Dispatched**.
- The Buyer can print out the PO, or if the eVA order method is **URL**, the PO is sent to the supplier by eVA.

All POs are interfaced to eVA, except POs with eVA order method of **Exception** and originating in eVA.





# Dispatching and Printing Purchase Orders (continued)

A PO maybe dispatched by either going to the **Maintain Purchase Order - Purchase Order** page and clicking on the **Dispatch** button, or by waiting for the automatic dispatch process to be run.

Navigation: Favorites ▾ | Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

---

### Maintain Purchase Order

#### Purchase Order

Business Unit 50100 PO ID 0001143552 PO Status Approved ✖

Copy From   ☐ Hold From Further Processing

▼ Header ?

\*PO Date   Supplier Search

\*Supplier    Supplier Details

\*Supplier ID   LL Carter & Son Inc

\*Buyer   MASON,GEORGE

PO Reference

Web IMS?: ☐

Header Details  
PO Defaults  
PO Activities  
Requisitions  
▼ Actions

Activity Summary  
Add Comments  
Add ShipTo Comments  
Document Status

Receipt Status Not Recvd

\*Dispatch Method

eVA PO Type   Routine Bill Vendor

\*eVA Order Method

eVA Interfaced

eVA Dttm

Amount Summary ?

|                   |          |     |
|-------------------|----------|-----|
| Merchandise       | 3,123.75 |     |
| Freight/Tax/Misc. | 0.00     |     |
| Total Amount      | 3,123.75 | USD |



# Dispatching and Printing Purchase Orders (continued)

A dispatched printed PO has a place for the Buyer's signature. Navigate to **the Dispatch POs** page using the following path:

## Main Menu > Purchasing > Purchase Orders > Dispatch POs

- Enter the **Business Unit** and **PO ID**.
- Check the **Print BU Comments** and **Print PO Item Description** checkbox.
- Print another copy, by clicking the **Print Copy** checkbox (optional).
- Click **Run**.

Dispatch POs

Run Control ID test123  
Language English  
Specified Language Recipient's Language

Run

Process Request Parameters

Business Unit 50100  
To  
PO ID 0001143568 Select Purchase Order  
PO Status Dispatched  
Contract SetID  
Contract ID  
Release  
From Date  
Through Date  
Supplier ID  
Buyer  
Fax Cover Page  
Template ID

Statuses to Include  
☐ Approved ☐ Dispatched ☐ Pending Cancel

Dispatch Methods to Include  
☒ Print ☒ FAX ☒ EDX  
☒ E-Mail ☒ Phone

Miscellaneous Options  
\*Chartfields Valid Chartfields  
Change Orders Changed and UnChanged Orders  
☐ Print Changes Only  
☐ Test Dispatch  
☒ Print BU Comments  
☒ Print PO Item Description  
☒ Print Copy  
☐ Print Duplicate  
Sort By Sort by Line Number

Save Notify Add Update/Display



# Dispatching and Printing Purchase Orders (continued)

The PO may be printed as a PDF version, as a copy only. This printed version does not have a **Buyer** signature box.

Navigate to the **Print POs** page using the following path:

**Main Menu > Purchasing > Purchase Orders > Review PO Information > Print POs**

Favorites ▾Main Menu ▾> Purchasing ▾> Purchase Orders ▾> Review PO Information ▾> Print POs

Print POs

Run Control ID test123Language English ▾

Report Manager

Process Monitor

Run

☒ Specified Language

☐ Recipient's Language

Report Request Parameters

Business Unit 50100 🔍To 🔍

PO ID 0001143551 🔍[Select Purchase Order](#)

Contract SetID

Contract ID

Release

From Date

Through Date

Supplier ID

Buyer

Statutes to Include

☐ Approved☐ Dispatched☐ Canceled

☐ Open☐ Pending☐ Completed

Miscellaneous Options

\*Hold Status On Hold AND Not On Hold ▾

\*Chartfields Recycled AND Valid Chartfields ▾

Change Orders UnChanged Orders ▾

☐ Print Changes Only

☒ Print PO Item Description

☐ Print Duplicate

Number Of Copies 1

Sort By Sort by Line Number ▾

SaveNotify

AddUpdate/Display



## Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Materials changes to POs interfaced from eVA into Cardinal are completed in eVA.

True or False



2. Once the creation of the PO is started, you can identify the following and associate to the PO.

- a) Items
- b) Suppliers
- c) Pricing
- d) Comments



3. Match the correct answer to each question:

- a) POs created without a requisition \_\_\_\_\_
- b) POs interfaced from eVA \_\_\_\_\_
- c) POs created by the purchase order build process from a requisition\_\_\_\_\_



## Lesson 2: Summary

2

### Processing Purchase Orders

In this lesson, you learned:

- You can create a PO without a requisition by awarding a Strategic Sourcing event or by copying a requisition, purchase order, or contract.
- POs that you create without a requisition require approval.
- POs created by the PO build process from a requisition are built with an Approved status.



# Lesson 3: Introduction

3

## Maintain and Modify Purchase Orders (Change Orders)

This lesson covers the following topics:

- Create Change Orders for Purchase Order
- Approve Change Orders
- Purchase Order – Modify Accounting Distribution
- Change Order Helpful Hints



# Create Change Orders for a PO

Except if interfaced from eVA or SiteManager, a change order is created manually when a dispatched PO requires modifications that affect any of the following:

- PO quantities
- Dollar values
- Shipping/billing addresses
- Add/cancel line items

In addition, since suppliers and agencies are charged eVA fees based on the values of a PO, all PO's must be reconciled to match the received and paid amounts. If an update is needed based on the reconciliation, it also creates a change order.

To make a change to a PO that has been dispatched, i.e., change order, use the **Add/Update POs** pages using the following path:

**Main Menu > Purchasing > Purchase Orders > Add/Update Pos**

Using the **Find Existing** tab, search for the PO you wish to change.



# Create Change Orders for a PO (continued)

There are several ways to create a change order from the **Maintain Purchase Order – Purchase Order** page:

- Click the blue triangle in the top right corner to change header information.
- Add a line/cancel a line using the **+/-** icons to the right of the line.
- Change the quantity or price on a PO line or PO schedule.
- Click the blue triangle on the **Lines – Statuses** tab to change line information.
- Click the blue triangle on the **Maintain Purchase Order – Schedules** page to make changes to a line schedule. Navigate to this page by clicking on the **Schedule** icon.

Do not change the price on a line that has been received against.










Once changes are made and **Saved**, the change order is ready for dispatch, or will be submitted for approval.

The screenshot displays the 'Maintain Purchase Order' interface. At the top, there's a navigation bar with 'Favorites', 'Main Menu', 'Purchasing', 'Purchase Orders', and 'Add/Update POs'. The main header shows 'Business Unit: 50100', 'PO ID: 0001143507', and 'PO Status: Dispatched'. A blue triangle icon is highlighted in the top right corner. Below the header, there's a 'Header' section with fields for 'PO Date' (08/09/2016), 'Supplier' (SHAWNS SMO-001), 'Supplier ID' (0000109090), and 'Buyer' (KELLEY YOUNG). To the right, there's a 'Backorder Status' section with 'Not Backordered' and a 'Create Back Order' button. Below that, there's a 'Receipt Status' section with 'Received' and a 'Dispatch' button. The 'Amount Summary' section shows 'Merchandise' (338.00), 'Freight/Tax/Misc.' (0.00), and 'Total Amount' (338.00 USD). The 'Lines' table has columns for 'Line', 'Item', 'Description', 'PO Qty', 'UOM', 'Category', 'Price', 'Merchandise Amount', and 'Status'. A red box highlights the 'Statuses' tab, and another red box highlights the 'Save' button at the bottom left. A third red box highlights the '+/-' icons on the right side of the 'Lines' table.



# Create Change Orders for a PO (continued)

From the **Maintain Purchase Order – Purchase Order** page, click on the **Schedule** icon to jump to the **Maintain Purchase Order - Schedules** page. To modify the schedule **Due Date** or **Ship To** fields, go to the **Statuses** tab in the **Schedules** section of the page and click on the **Blue Triangle** icon.

| Lines ? |  |                    |  |          |  |   |          |            |         |       | Personalize   Find   View All     |          |          |   | First 1 of 1 Last   |   |   |
|---------|--|--------------------|--|----------|--|---|----------|------------|---------|-------|---|----------|----------|---|---|---|---|
| Details |  | Ship To/Due Date   |  | Statuses |  | Item Information  |          | Attributes |         | RFQ   |   | Contract |          | Receiving   |   |  |   |
| Line    | Item   | Description        |  |          |  | PO Qty  | *UOM     | Category   |         | Price | Merchandise Amount  | Status   |          |   |   |   |   |
| 1       |  7503532020 | STONE NO. 1, STONE |  |          |  |  | 125.0000 | LTN        | 7503532 |       | 24.99000  | 3,123.75 | Approved |  |  |  |  |

Maintain Purchase Order

Schedules

Unit 50100Supplier LL CARTER -003PO Status Dispatched  
PO ID 0001143549PO Date 12/22/2016



Return to Main Page


Lines









Find | View All | First 1 of 1 Last

|        |                 |                    |                 |     |                          |     |
|--------|-----------------|--------------------|-----------------|-----|--------------------------|-----|
| Line 1 | Item 7503532020 | STONE NO. 1, STONE | PO Qty 125.0000 | LTN | Merchandise Amt 3,123.75 | USD |
|--------|-----------------|--------------------|-----------------|-----|--------------------------|-----|

Schedules

Personalize | Find | View All |  

Details | Statuses | Shipment | Matching | Receiving | Freight | RTV | 

| Sched | *Due Date  | *Ship To   |   | *PO Qty  | Price    | Merchandise Amount | Status |   |   |   |   |   |   |
|-------|--|------------|---|----------|----------|--------------------|--------|---|---|---|---|---|---|
| 1     |  12/22/2016 | CNTRL OFF3 |  | 125.0000 | 24.99000 | 3,123.75           | Active |  |  |  |  |  |  |

Add ShipTo Comments

Save

Return to Search

Notify

Refresh

Add

Update/Display

When updates have been completed, click **Return to Main Page** to return to the prior page.



# Create Change Orders for a PO (continued)

From the **Maintain Purchase Order - Purchase Order** page, the quantity of a PO can be increased or decreased:

- Click on the **Change Order** icon, i.e., the blue triangle, in the top right hand corner of the **Maintain Purchase Order - Purchase Order** page. The **Maintain Purchase Order - Purchase Order** page remains displayed and changes can be made.

FavoritesMain MenuPurchasingPurchase OrdersAdd/Update POs

Maintain Purchase Order

Purchase Order

Business Unit50100

PO ID0001143567

Copy From

PO StatusDispatched

△

×

Hold From Further Processing

Header

\*PO Date08/09/2016

Supplier Search

Backorder StatusNot Backordered

Create BackOrder

\*SupplierSHAWNS SMO-001

Supplier Details

Receipt StatusReceived

Dispatch

\*Supplier ID0000109090

Shawns Smokehouse BBQ Company LLC

\*Dispatch MethodPrint

eVA PO TypeR01

Routine Bill Vendor

\*BuyerKELLEY.YOUNG

Young, Kelley (VDOT)

\*eVA Order MethodURL

eVA InterfacedSEVA

eVA Dttm08/09/16 9:01:26AM

PO Reference

Web IMS?

Header Details

Activity Summary

PO Defaults

Add Comments

PO Activities

Add ShipTo Comments

Requisitions

Document Status

Actions

Amount Summary

Merchandise336.00

Freight/Tax/Misc.0.00

Total Amount336.00 USD

Calculate

Add Items From

Catalog

Item Search

Purchasing Kit

Select Lines To Display

Search for Lines

Line

To

Retrieve

Lines

PersonalizeFindView All

First1 of 1Last

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

| Line | Item       | Description   | PO Qty  | *UOM | Category | Price    | Merchandise Amount | Status   |  |  |  |  |
|------|------------|---|---------|------|----------|----------|--------------------|----------|--|--|--|--|
| 1    | 9611501000 | CONCESSIONS, CATERING, VENDING, MOBILE AND STATIONARY CATERING SERVICES | 28.0000 | EA   | 9611501  | 12.00000 | 336.00             | Approved |  |  |  |  |

View Approvals

Close Short All Lines

\*Go toMore...

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

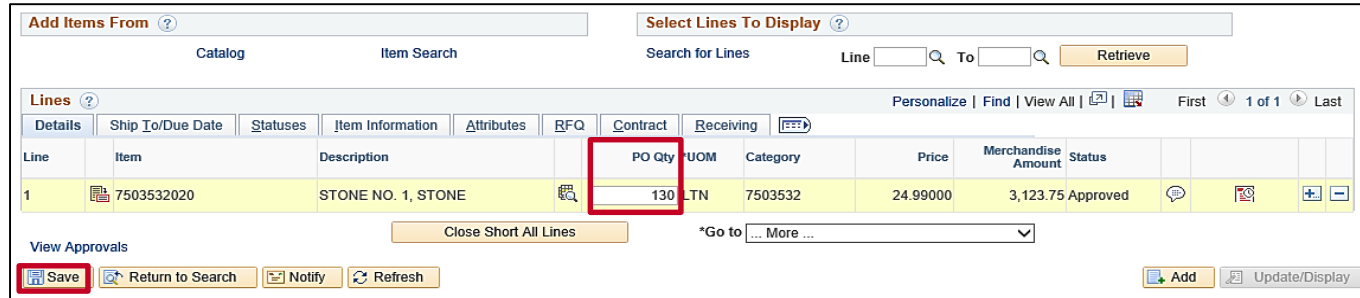
Add

Update/Display

# Create Change Orders for a PO (continued)

On the **Maintain Purchase Order - Purchase Order** page:

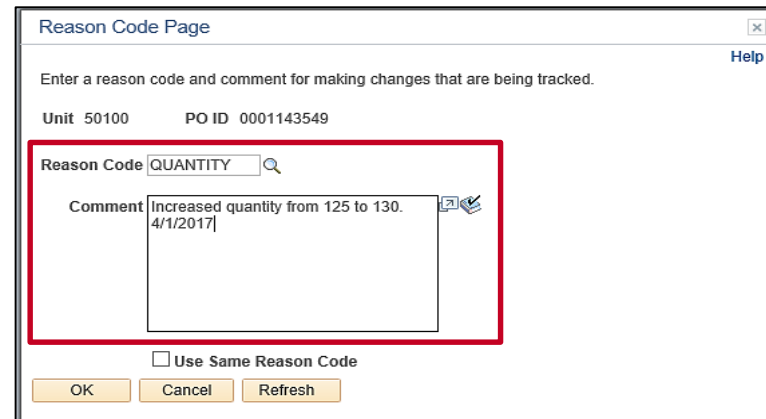
- Make the needed changes to the existing line(s). In this example the **PO Qty** is increased from **125** to **130**.
- Click **Save**.



The screenshot shows the 'Maintain Purchase Order - Purchase Order' page. At the top, there are tabs for 'Add Items From' (Catalog, Item Search) and 'Select Lines To Display' (Search for Lines, Line, To, Retrieve). Below these is a 'Lines' section with a table of purchase order lines. The table has columns: Line, Item, Description, PO Qty, UOM, Category, Price, Merchandise Amount, Status, and icons. Line 1 is highlighted in yellow, and its 'PO Qty' field is highlighted with a red box, showing the value 130. Below the table, there are buttons for 'View Approvals', 'Save' (highlighted with a red box), 'Return to Search', 'Notify', and 'Refresh'. There are also buttons for 'Add' and 'Update/Display'.

The **Change Reason** pop-up window displays:

- Enter a **Reason Code** and **Comment** to explain the change(s).
- Click **OK**.



The screenshot shows the 'Reason Code Page' pop-up window. It has a title bar with 'Reason Code Page' and a 'Help' button. The main text says 'Enter a reason code and comment for making changes that are being tracked.' Below this, there are fields for 'Unit' (50100) and 'PO ID' (0001143549). The 'Reason Code' field contains 'QUANTITY' and the 'Comment' field contains 'Increased quantity from 125 to 130. 4/1/2017'. At the bottom, there is a checkbox for 'Use Same Reason Code' and three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Refresh'.

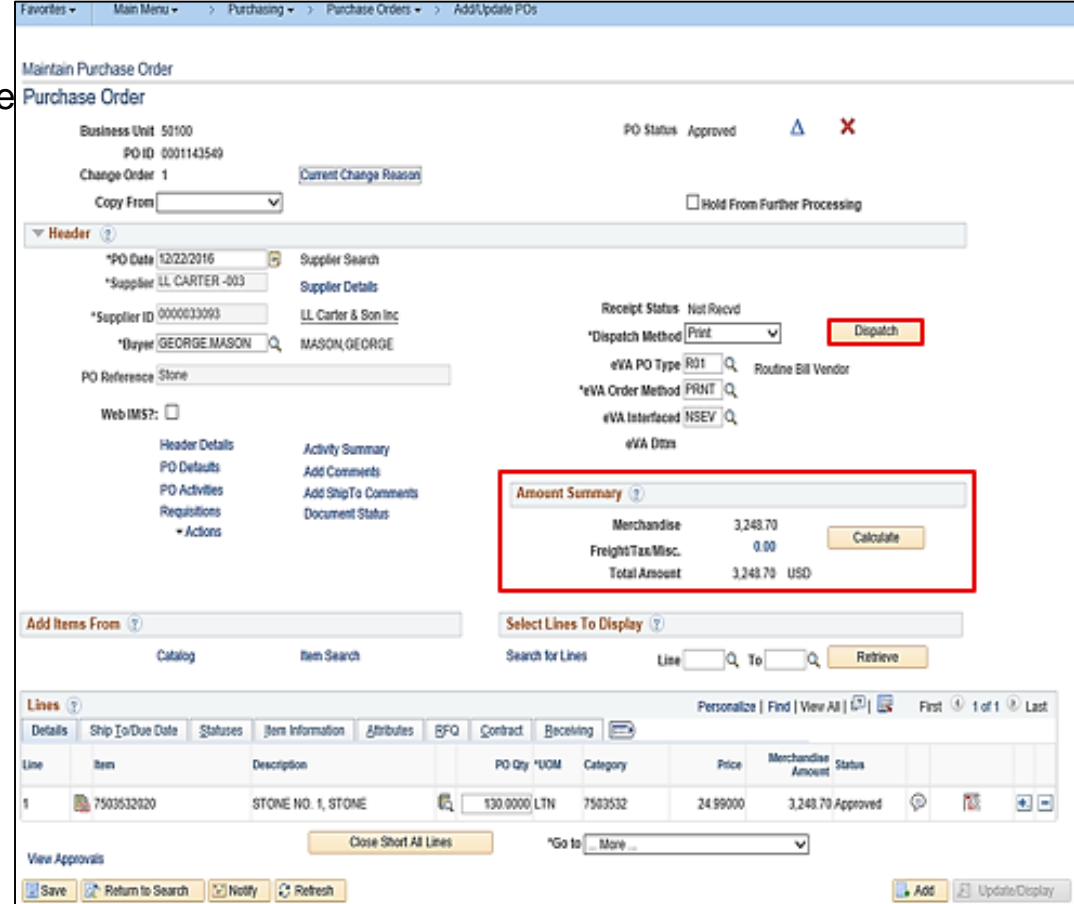
# Create Change Orders for a PO (continued)

Upon **Save**, a **Change Order** number displays, fields are updated, and amounts recalculated.

In the example below, the PO value did not increase by more than 25% and therefore its status remains **Approved**.

See the section in this lesson entitled Change Order Helpful Hints for additional details on change order approval processing.

- The **Dispatch Method** defaults to **Print**.
- Click on the **Dispatch** button.



**Maintain Purchase Order**

**Purchase Order**

Business Unit: 50100 PO Status: Approved  
PO ID: 0001143549  
Change Order: 1  
Copy From: [dropdown] [Current Change Reason]  
[Hold From Further Processing]

**Header**

\*PO Date: 12/22/2016 Supplier Search  
\*Supplier: LL CARTER -003 Supplier Details  
\*Supplier ID: 0000033093 LL Carter & Son Inc  
\*Buyer: GEORGE.MASON MASON,GEORGE  
PO Reference: Stone  
Web IMS?: [checkbox]  
Receipt Status: Not Recvd  
\*Dispatch Method: Print [Dispatch]  
eVA PO Type: R01 Routine Bill Vendor  
\*eVA Order Method: PRINT  
eVA Interfaced: INSEV  
eVA Dtm:

**Amount Summary**

|                   |              |           |
|-------------------|--------------|-----------|
| Merchandise       | 3,248.70     | Calculate |
| Freight/Tax/Misc. | 0.00         |           |
| Total Amount      | 3,248.70 USD |           |

**Add Items From** [Catalog] [Item Search] **Select Lines To Display** [Search for Lines] [Line] [To] [Retrieve]

**Lines**

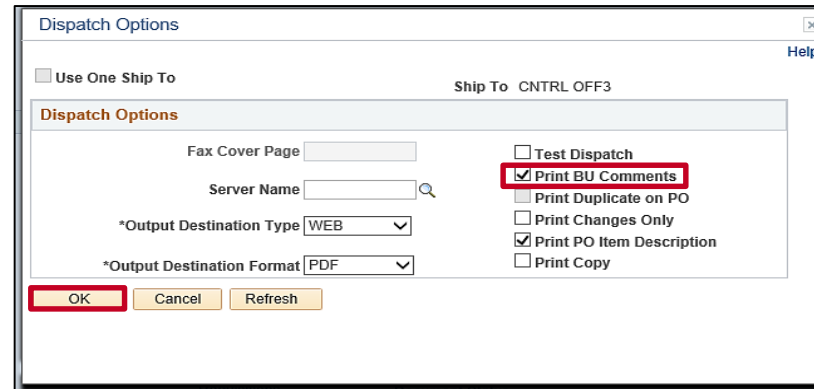
| Line | Item       | Description        | PO Qty   | UOM | Category | Price    | Merchandise Amount | Status   |
|------|------------|--------------------|----------|-----|----------|----------|--------------------|----------|
| 1    | 7503532020 | STONE NO. 1, STONE | 130.0000 | LTN | 7503532  | 24.99000 | 3,248.70           | Approved |

View Approvals [Close Short All Lines] \*Go to: [More...]  
[Save] [Return to Search] [Notify] [Refresh] [Add] [Update/Display]

# Create Change Orders for a PO (continued)

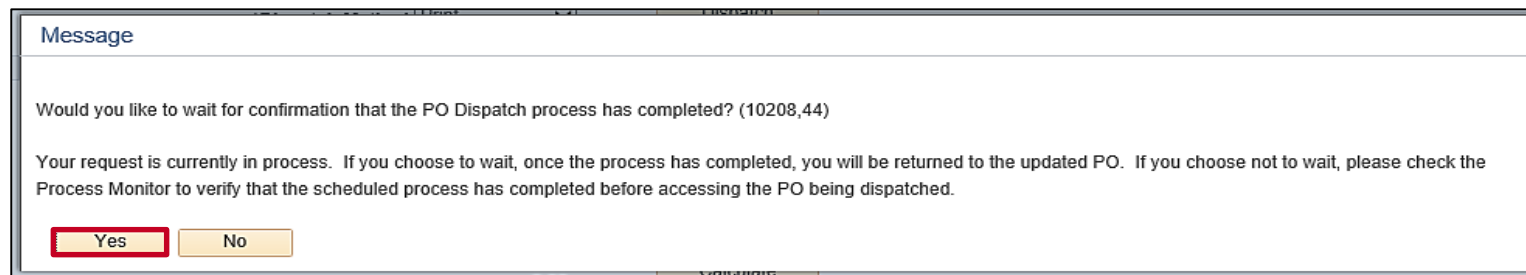
The **Dispatch Options** pop-up window displays:

- Check **Print BU Comments** to display line and header comments, to include eVA terms and conditions.
- Click **OK**.



A pop-up message regarding waiting for confirmation will be displayed:

- Click **Yes**. Once the PO Dispatch process has completed, the **Maintain Purchase Order – Purchase Order** page will display.





# Create Change Orders for a PO (continued)

On the Maintain **Purchase Order - Purchase Order** page, the **PO Status** has been updated to **Dispatched**.

A dispatched PO flows to eVA for reporting purposes. If the supplier is set up in eVA as URL dispatch, the PO is sent electronically to the supplier. If not, the Buyer should print the PO and send it to the supplier.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

Purchase Order

Business Unit 50100  
PO ID 0001201031  
Copy From ▾

PO Status Dispatched  
☐ Hold From Further Processing

▼ Header ?

\*PO Date 08/06/2019 ⓘ  
\*Supplier ATTRONICA -004 ⓘ  
\*Supplier ID 0000034356 ⓘ  
\*Buyer EVA.BUYER ⓘ  
PO Reference EP3050193  
Web IMS?: ☐

Supplier Search  
Supplier Details  
ATTRONICA COMPUTERS INC  
EVA BUYER

Header Details  
PO Defaults  
PO Activities  
Requisitions  
Actions

Activity Summary  
Edit Comments  
Add ShipTo Comments  
Document Status

Receipt Status Not Recvd  
\*Dispatch Method Phone ▾ Dispatch

eVA PO Type EVP  
eVA Order Method EXCP  
eVA Interfaced Y  
eVA Dttm 08/07/19 7:08:10AM  
eVA PO ID EP3050193

Amount Summary ?

Merchandise 2,225.00  
Freight/Tax/Misc. 0.00  
Total Amount 2,225.00 USD

Calculate

69



# Create Change Orders for a PO: Cancel PO

## Cancel PO:

To cancel a PO, click on the red **X** on the **Maintain Purchase Order – Purchase Order** page. This begins the cancellation process, which includes changing the lines to a **Cancel** status and changing the header to a **Pending Cancel** status

In order to cancel the PO:

- The PO cannot be on hold
- There cannot be any matched PO line schedules
- There cannot be any receipts against the PO
- There cannot be any open vouchers against the PO

When canceling a PO from a Strategic Sourcing event, Cardinal asks if the quantity should be moved back into the Sourcing event. If yes, the quantity is put back to the award and can either be re-awarded to another bidder or manually close it.

Once cancelled, the Buyer or a batch process will dispatch the PO to complete the cancellation process. This step is required to officially cancel the PO.





# Create Change Orders for a PO: Cancel PO (continued)

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

---

Maintain Purchase Order

## Purchase Order


Business Unit 50100 PO ID 0001143549 PO Status Dispatched  






Change Order 1 Current Change Reason

Copy From

☐ Hold From Further Processing

---


▼ Header 

|  |   |  |
|--|---|--|
| *PO Date <input type="text" value="12/22/2016"/>  | Supplier Search                         | Backorder Status Not Backordered <a href="#">Create BackOrder</a>  |
| *Supplier <input type="text" value="LL CARTER -003"/>  | <a href="#">Supplier Details</a>        | Receipt Status Not Recvd   |
| *Supplier ID <input type="text" value="0000033093"/>   | <a href="#">LL Carter &amp; Son Inc</a> | *Dispatch Method <input type="text" value="Print"/> <input type="button" value="Dispatch"/>  |
| *Buyer <input type="text" value="GEORGE.MASON"/>  | <a href="#">MASON,GEORGE</a>            | eVA PO Type <input type="text" value="R01"/>  Routine Bill Vendor |
| PO Reference <input type="text" value="Stone"/>  |   | *eVA Order Method <input type="text" value="PRNT"/>               |
| Web IMS?: <input type="checkbox"/>   |   | eVA Interfaced <input type="text" value="NSEV"/>                  |
|  |   | eVA Dttm   |

[Header Details](#)  
[PO Defaults](#)  
[PO Activities](#)  
[Requisitions](#)  
[Actions](#)

[Activity Summary](#)  
[Add Comments](#)  
[Add ShipTo Comments](#)  
[Document Status](#)

---

**Amount Summary** 

|                   |              |  |
|-------------------|--------------|--|
| Merchandise       | 3,248.70     | <input type="button" value="Calculate"/> |
| Freight/Tax/Misc. | 0.00         |  |
| Total Amount      | 3,248.70 USD |  |





# Create Change Orders for a PO: Cancel PO Line

Canceling the PO Line is available if the PO status is **Dispatched**. If a dispatched line is cancelled, a change order is created. Canceling is also available when the PO status is **Approved**, but only if the PO was previously dispatched and subsequently changed and approved.

From the **Maintain Purchase Order – Purchase Order** page, navigate to the **Details for Line** page using the **Line Details** icon. Click the red **X** to cancel the PO Line. The system cancels the PO line.

Details for Line 1

Help

PO ID 0001143549

Supplier LL CARTER -003

Line 1

Item ID 7503532020

STONE NO. 1, STONE

Line Details

Category 7503532

Description STONE

Category ID 03113

Amount to Receive 3,248.700

Quantity to Receive 130.0000

Item Availability

Line Status Approved

Backorder Status Not

Backordered

Amount Summary

Merchandise Amount 3,248.70

Doc. Base Amt 3,248.70

Transaction Item Description

STONE NO. 1, STONE

Preferred Language Item Description

STONE NO. 1, STONE

Expand All

Collapse All

Item Information

Attributes

RFQ

Contract

Receiving

OK

Cancel

Refresh



# Create Change Orders for a PO: Cancel PO Schedule

Canceling the PO Schedule is available if the PO status is **Dispatched**. If a dispatched schedule is cancelled, a change order is created. Canceling is also available when the PO status is **Approved**, but only if the PO was previously dispatched and subsequently changed and approved.

From the **Maintain Purchase Order – Purchase Order** page, navigate to the **Schedules** page using the **Schedule** icon. Click on the **Schedule Details** icon to open the **Details for Schedule** pop-up window. Click the red **X** to cancel the purchase order schedule. The system cancels the PO schedule.

Details for Schedule 1

Unit 50100  
PO ID 0001201045

Supplier SUPERIOR P-005  
Item 7452150000

BM-25.0 (BASE MIXTURE) BM-25.0

Line 2  
Schedule 1

Status Active

△ ×

Schedule Details

Due Date 08/07/2019  
Time Due  
Ship To FREDRK RES

Original Promise Date 08/07/2019  
Ship Date  
Ship Via COMMON  
Freight Terms FOB DEST  
Attention To  
Distribute By Quantity

Common Carrier  
FOB Dest, Freight Prepaid

☐ Custom Price - No Override  
☐ Zero Price Indicator No Charge

Amount Summary

Schedule Qty75.0000  
Merchandise Amt5,163.90 USD  
Doc. Base Amount5,163.90 USD



# Approve Change Orders

After a change order is created, it should be approved (if necessary) and dispatched to the supplier. The change order dispatch process is the same as with the original PO. Remember to check the **Approval** check box to send the change order for approval.

POs that have change orders attached to them go through a specific approval routing that depends on the difference between the originally approved PO amount, the change order amount, or if a line was added. If a new line is added to a PO, it will require the Buyer's Supervisor approval at a minimum. Any change to a PO that affects the **Quantity**, **Price**, or **Ship To** fields may require approval.

The change order appears on the approver's work list and an email is sent to the approver with a link to approve the change order. The approval process for change orders is the same as for POs.

After approval, the change order must be dispatched and any changes made to the PO are in bold print on the printed change order.

For more detailed information about change order approval requirements, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Training**.



# Change Order Helpful Hints

## Change Order Approvals Summary:

- Adding a line to a PO will require Supervisor approval.
- Changes < 25% do not need Supervisor approval.
- Changes > 25% will escalate to the Supervisor for approval.
- Changes > 25% or \$50,000 (whichever is greater) to PO with original value > \$50,000 will escalate to the ASD Director for Approval

## Helpful Hints:

- The following will automatically cancel an eVA order and create a new eVA order:
  - Change to the Bill To Address
  - Change to a different address location for the same supplier
- Never change the unit price on an item that has already been received and vouchered. Close out the line amount to what has been matched and insert a new line for the remaining items at a changed price.



# Approve Change Orders (continued)

Change orders are approved on the **Purchase Order Approval** page. Access this page through the worklist using the hyperlink at the bottom of every page.

Navigate to the **Purchase Order Approval** page using the following path:

**Main Menu > Worklist > Worklist**

Click the **Purchase Order** hyperlink to access the change order to be approved.

For more detailed information about change order approvals, see the course entitled **501 PR343: Procurement Approvals** located on the Cardinal website in **Course Materials** under **Training**.

**Purchase Order Approval**

Business Unit: 50100  
PO ID: 0001196509  
PO Total: 408,420.00 USD  
Supplier ID: 0000015454 Cargill Inc.  
Buyer: DEBBIE.BELL  
PO Reference: 50% Change Order Test

PO Status: Pend Appr  
PO Date: 03/16/2019

Justification: No justification entered by buyer.

**Review Lines**

| Select                   | Line | Item Description  | Quantity  | UOM | Price     | Merchandise Amount | Currency | Original Substituted Item | Description |
|--------------------------|------|---|-----------|-----|-----------|--------------------|----------|---------------------------|-------------|
| <input type="checkbox"/> | 1    | SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE SALT, SODIUM CHLORIDE, BULK | 3500.0000 | LTN | 116.12000 | 408,420.00         | USD      |                           |             |

**Review / Edit Approvers**

**PO/CO for Supervisor Action**

Purchase Order 0001196509: Approved [Start New Path]

**CO for Procurement MNGT Action**

Purchase Order 0001196509: Pending [View/Hide Comments] [Start New Path]

Chng Ord - Org Val > 50000

Admin Approved: Kimberlin, Kelley (VDOT) Procurement Manager Approval 03/16/19 - 10:07 AM

Admin Approved: Peterson, Tanya N. (VDOT) Sr Procurement Mgr Approval 03/16/19 - 10:09 AM

Pending: Multiple Approvers ASD Director Approval

Reviewer: Babb, Angelika (VDOT) Reviewer

**Comments**

**Comment History**

Approval Comments

Approve Hold Deny Pushback



# Approve Change Orders (continued)

Navigation: Favorites > Main Menu > Worklist > Worklist

### Purchase Order Approval

Business Unit: 50100  
PO ID: 0001190509  
PO Total: 408,420.00 USD  
Supplier ID: 0000015454 Cargill Inc  
Buyer: DEBBIE.BELL  
PO Reference: 50% Change Order Test

PO Status: Pend Appr  
PO Date: 09/18/2019

Justification: No justification entered by buyer.

[Edit PO](#)

#### Review Lines

Line Details

| Select                   | Line | Item Description   | Quantity  | UOM | Price     | Merchandise Amount | Currency | Original Substituted Item | Description |
|--------------------------|------|--|-----------|-----|-----------|--------------------|----------|---------------------------|-------------|
| <input type="checkbox"/> | 1    | SALT, SODIUM CHLORIDE, FOR ROAD MAINTENANCE<br>SALT, SODIUM CHLORIDE, BULK | 3500.0000 | LTN | 116.12000 | 408,420.00         | USD      |                           |             |

☒ Select All ☐ Clear All [View Lines Details](#)

#### Review / Edit Approvers

**PO/CO for Supervisor Action**

Purchase Order 0001196509: **Approved** [Start New Path](#)

**CO for Procurement MNGT Action**

Purchase Order 0001196509: **Pending** [View/Hide Comments](#) [Start New Path](#)

Chng Ord - Org Val > 50000

**Admin Approved** → **Admin Approved** → **Pending** → **Reviewer**

Kimberlin, Kelley (VDOT)  
Procurement Manager Approval  
09/18/19 - 10:07 AM

Peterson, Tonya N. (VDOT)  
Sr Procurement Mgr Approval  
09/18/19 - 10:09 AM

Multiple Approvers  
ASD Director Approval

Sabb, Angelika (VDOT)  
Reviewer

**Comments**  
**Comment History**

Approval Comments

[Approve](#) [Hold](#) [Deny](#) [Pushback](#)



# Simulation: Creating a Purchase Order/Ad-Hoc

You will now view a simulation that demonstrates how to **Create a Purchase Order/Ad-Hoc**.





# Purchase Order: Modify Accounting Distribution

Accounting entries may be modified for PO lines that have not yet been received or matched and vouchered in Accounts Payable. Changing accounting distributions does not trigger the change order approval process.

There are instances when a PO has been partially received/vouchered and, due to fiscal changes in budgets or project coding, it is necessary to change/edit the chart of accounts distribution for the remaining balance.

For more detailed information about making these changes, see the job aid entitled **501 PR344: Update ChartFields on Partially Vouchered Purchase Orders** located on the Cardinal website in **Job Aids** under **Training**.

## Modify Accounting Distributions: Single Line

To modify the accounting distribution for a single line, navigate to this page using the following path:

### **Purchasing > Purchase Orders > Add/Update Pos**

- Select the **Schedule** icon from the **Details** tab to open the **Schedules** page.
- Select the **Distributions/ChartFields** icon on the line to be changed.
- Enter the new ChartField values.
- Click **OK** to save.





# Purchase Order: Modify Accounting Distribution (continued)

## Modify Accounting Distributions: Single Line

Lines ?

Details

Ship To/Due Date

Statuses

Item Information

Attributes

RFQ

Contract

Receiving

Personalize | Find | View All | | First 1 of 1 Last

| Line | Item       | Description        | PO Qty   | *UOM | Category | Price    | Merchandise Amount | Status   |  |  |  |  |
|------|------------|--------------------|----------|------|----------|----------|--------------------|----------|--|--|--|--|
| 1    | 7503532020 | STONE NO. 1, STONE | 125.0000 | LTN  | 7503532  | 24.99000 | 3,123.75           | Approved |  |  |  |  |

Maintain Purchase Order

Schedules

Unit 50100

Supplier LL CARTER -003

PO ID 0001143549

PO Date 12/22/2016

PO Status Dispatched

[Return to Main Page](#)

Lines

Distributions for Schedule 1

Unit 50100

Supplier LL CARTER -003

PO ID 0001143549

Item 7503532020

Line 1

STONE NO. 1, STONE

Schedule 1

Status Active

\*Distribute By Quantity

SpeedChart

Distribution

Chartfields

Details/Tax

Asset Information

Req Detail

Statuses

Personalize | Find | View All | | First 1 of 1 Last

| Dist | Status | Percent  | PO Qty   | Merchandise Amount | Currency | *GL Unit | Entry Event | *Account | Fund  | Program | Department |
|------|--------|----------|----------|--------------------|----------|----------|-------------|----------|-------|---------|------------|
| 1    | Open   | 100.0000 | 130.0000 | 3,248.70           | USD      | 50100    |             | 5012550  | 04100 | 699001  | 10003      |

OK Cancel Refresh

Find | View All | First 1 of 1 Last

PO Qty 125.0000 LTN Merchandise Amt 3,123.75 USD

Personalize | Find | View All | | First 1 of 1 Last

| PO Qty   | Price    | Merchandise Amount | Status   |  |  |  |  |
|----------|----------|--------------------|----------|--|--|--|--|
| 125.0000 | 24.99000 | 3,123.75           | Approved |  |  |  |  |

Add Update/Display



# Purchase Order: Modify Accounting Distribution (continued)

In the event a pop-up message is displayed, use the information found within the message to resolve the error. In the example below, the **Account** is required.

For more detailed information about combination edits, see the job aid entitled **501 GL332: Combination Edits Review Tools** located on the Cardinal website in **Job Aids** under **Training**.

A screenshot of a software pop-up message box. The box has a title bar with the word "Message". The main text area contains the following message: "Correct ChartFields Combination on Line Number: 1 Schedule Number: 1 Distribution Line Number: 1 for Chartfields: ACCOUNT/ FUND\_CODE in Group: ACCTFNDREQ. (10208,66)". Below this, it says: "For a list of valid ChartField combination data, please refer Combination Data under Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Review Combination Data". At the bottom left of the message box, there is a yellow button with the text "OK" in black, which is highlighted with a red rectangular border. Below the message box, a portion of the underlying application window is visible, showing a table with columns "Freight/Tax/Misc." and "Total Amount", and a row with the value "7,500,000.00 USD".

Message

Correct ChartFields Combination on Line Number: 1 Schedule Number: 1 Distribution Line Number: 1 for Chartfields: ACCOUNT/ FUND\_CODE in Group: ACCTFNDREQ. (10208,66)

For a list of valid ChartField combination data, please refer Combination Data under Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Review Combination Data

OK

Freight/Tax/Misc. 7,500,000.00 USD



# Purchase Order: Modify Accounting Distribution (continued)

Accounting entries may be modified for PO lines that have not yet been received or matched and vouchered in Accounts Payable.

Changing accounting distributions does not trigger the change order approval process.

Access the accounting distribution lines from the **Maintain Purchase Order – Purchase Order** pop-up window by clicking on the **PO Defaults** hyperlink.

New values entered on this page will override default values. Only fields with new values will be updated.

**Purchase Order Defaults**

Business Unit 50100 PO ID 0001143549 Supplier LL CARTER -003 Change Order 1

**Default Options**

☐ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ **Override** If you select this option, all default values entered on this page override the default values found in the default hierarchy.

**Line**

Category  Unit of Measure

**Schedule**

Ship To  Central Office Old Bldg Ultimate Use Code

Due Date  Original Promise Date

Ship Via  Freight Terms Code

Arbitration  Freight Charge Method

\*Distribute By  One Time Address

**Distribution**

SpeedChart

**Distributions** Personalize | Find | View All | First 1 of 1 Last

Chartfields Asset Information

| Dist | Percent | GL Unit | Entry Event | Account | Fund | Program | Department | Cost Center | Task |
|------|---------|---------|-------------|---------|------|---------|------------|-------------|------|
| 1    |         | 50100   |             |         |      |         | 10081      |             |      |

OK Cancel Refresh



# Purchase Order: Modify Accounting Distribution (continued)

Purchase Order Defaults

Business Unit 50100PO ID 0001143549Supplier LL CARTER -003Change Order 1

Default Options

☐ Default

If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override

If you select this option, all default values entered on this page override the default values found in the default hierarchy.

Line

CategoryUnit of Measure

Schedule

Ship ToCNTRL OFF3Central Office Old Bldg

Due Date

Ship ViaCOMMON

Arbitration

\*Distribute ByQuantity

Ultimate Use Code

Original Promise Date

Freight Terms CodeFOB DEST

Freight Charge Method

One Time Address

Distribution

SpeedChart

Distributions

Personalize | Find | View All | First 1 of 1 Last

Chartfields

Asset Information

| Dist | Percent | GL Unit | Entry Event | Account | Fund | Program | Department | Cost Center | Task |
|------|---------|---------|-------------|---------|------|---------|------------|-------------|------|
| 1    |         | 50100   |             |         |      |         | 10081      |             |      |

OKCancelRefresh



## Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Modifying the accounting distribution does not trigger change order approval.

True or False



2. When you need to change a PO that has already been \_\_\_\_\_, you create a change order.

- a) Started
- b) Dispatched
- c) Approved
- d) Closed



## Lesson 3: Summary

3

### Maintain and Modify Purchase Orders (Change Orders)

In this lesson, you learned:

- To modify a PO that has already been dispatched, you need to create a change order.
- You can create a change order (modify a purchase order) using the Add/Update POs page.
- To cancel a PO Line, navigate to the Details for Line page for that PO line you want to cancel and click on the Red X. This cancels the line only.
- If the chart of accounts distribution is not valid, an error message will be displayed.



# Lesson 4: Introduction

4

Reconciling/Close the PO

This lesson covers the following topics:

- Reconcile/Close a PO



# Reconciling/Close a PO

Once a PO is complete, if the amount/quantity received differs from what was ordered, received, and ultimately invoiced by the supplier, the quantities, or amounts must be decreased or increased, to match the actual amount/quantity received.

To reconcile/close a PO navigate using the following path:

**Main Menu > Purchasing > Purchase Orders > Add/Update POs**

- Select the **Find an Existing Value** tab.
- Enter the **PO ID #** to be closed out.
- Click **Search** button. The **Maintain Purchase Order – Purchase Order** page displays.
- The details of the PO selected are displayed.
- Click on the **Activity Summary** hyperlink. The **Activity Summary** page will display.

**Maintain Purchase Order**

**Purchase Order**

Business Unit 50100  
PO ID 0001143553  
Copy From [ ]  
PO Status Dispatched  
[ ] Hold From Further Processing

**Header**

\*PO Date 01/09/2017  
\*Supplier LL CARTER -003  
\*Supplier ID 0000033093  
\*Buyer GEORGE MASON  
PO Reference Stone  
Web IMS?: [ ]

Supplier Search  
Supplier Details  
LL Carter & Son Inc  
MASON, GEORGE

Backorder Status Not Backordered  
Receipt Status Partial  
\*Dispatch Method Print  
eVA PO Type R01  
\*eVA Order Method PRNT  
eVA Interfaced NSEV  
eVA Dtm

**Amount Summary**

Merchandise 6,247.50  
Freight/Tax/Misc. 0.00  
Total Amount 6,247.50 USD

**Add Items From**

Catalog Item Search

**Select Lines To Display**

Search for Lines Line [ ] To [ ] Retrieve

**Lines**

Details Ship To/Due Date Statuses Item Information Attributes RFQ Contract Receiving

| Line | Item       | Description        | PO Qty   | *UOM | Category | Price    | Merchandise Amount | Status   |
|------|------------|--------------------|----------|------|----------|----------|--------------------|----------|
| 1    | 7503532020 | STONE NO. 1, STONE | 250.0000 | LTN  | 7503532  | 24.99000 | 6,247.50           | Approved |

View Approvals  
Close Short All Lines  
\*Go to [ ] More ...

Save Return to Search Notify Refresh Add Update/Display





# Reconciling/Close a PO (continued)

- The **Activity Summary** header displays the **Merchandise Amount**, **Merchandise Receipt**, **Merchandise Returned**, **Merchandise Invoice**, and **Merchandise Matched** values.
- The **Details** tab displays the **Order Qty**. Scroll to the right and make note of the quantity ordered.
- Click on the **Receipt** tab.

Activity Summary

Business Unit 50100  
Purchase Order 0001143553

PO Status Dispatched  
Supplier LL Carter & Son Inc  
Supplier Location MAIN

|                      |          |     |
|----------------------|----------|-----|
| Merchandise Amount   | 6,247.50 | USD |
| Merchandise Receipt  | 4,998.00 | USD |
| Merchandise Returned | 0.00     | USD |
| Merchandise Invoice  | 0.00     | USD |
| Merchandise Matched  | 0.00     | USD |

Lines Personalize | Find | View All | First 1 of 1 Last

Details Receipt Invoice Matched RTV

| Line | Item       | Item Description   | UOM | Order Qty | Amount Ordered | Currency | Amount Only |
|------|------------|--------------------|-----|-----------|----------------|----------|-------------|
| 1    | 7503532020 | STONE NO. 1, STONE | LTN | 250.0000  | 6,247.500      | USD      |             |

Return to Search Notify



# Reconciling/Close a PO (continued)

- The **Receipt** tab displays the **Qty Received**. Make note of the quantity received.
- Click on the **Invoice** tab.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs > Activity Summary

Activity Summary

Business Unit 50100

Purchase Order 0001143553

Merchandise Amount 6,247.50 USD

Merchandise Receipt 4,998.00 USD

Merchandise Returned 0.00 USD

Merchandise Invoice 0.00 USD

Merchandise Matched 0.00 USD

PO Status Dispatched

Supplier LL Carter & Son Inc

Supplier Location MAIN

Lines

Personalize | Find | View All |

First 1 of 1 Last

Details

Receipt

Invoice

Matched

RTV

| Line | Item       | Item Description   | UOM | Qty Received | Qty Accepted | Open Quantity | Open Amount | Currency |  |
|------|------------|--------------------|-----|--------------|--------------|---------------|-------------|----------|--|
| 1    | 7503532020 | STONE NO. 1, STONE | LTN | 200.0000     | 200.0000     | 50.0000       | 1,249.500   | USD      |  |

Return to Search

Notify



# Reconciling/Close a PO (continued)

- The **Invoice** tab displays the **Quantity Invoiced** and **Amt Invoiced** from the supplier. \
- For each line compare:
  - the **Order Qty** on the **Details** tab with the **Qty Received** on the **Receipt** tab
  - along with the **Quantity Invoiced** on the Invoice tab.
- Click on the **Matched** tab.

Activity Summary

Business Unit 50100 PO Status Dispatched  
Purchase Order 0001143553 Supplier LL Carter & Son Inc  
Supplier Location MAIN

Merchandise Amount 6,247.50 USD  
Merchandise Receipt 4,998.00 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 0.00 USD  
Merchandise Matched 0.00 USD

Lines Personalize | Find | View All | First 1 of 1 Last

Details Receipt **Invoice** Matched RTV

| Line | Item       | Item Description   | UOM | Quantity Invoiced | Amount Only              | Amt Invoiced | Currency | Un-invoice Quant |
|------|------------|--------------------|-----|-------------------|--------------------------|--------------|----------|------------------|
| 1    | 7503532020 | STONE NO. 1, STONE | LTN | 0.0000            | <input type="checkbox"/> | 0.000        | USD      | 250.00           |

[Return to Search](#) [Notify](#)



# Reconciling/Close a PO (continued)

- The **Matched** tab displays the **Qty Matched** and **Amt Matched** as vouchered/paid from the Accounts Payable module. Matching is an automated process that is handled within the Accounts Payable module. The matching process is used to compare vouchers. i.e., supplier invoices, with purchase orders, and receiving documents. In this example matching has not yet occurred therefore the values remain at zero.
- Close or minimize the page and go back to the **Maintain Purchase Order – Purchase Order** page.

Activity Summary

Business Unit 50100 PO Status Dispatched  
Purchase Order 0001143553 Supplier LL Carter & Son Inc  
Supplier Location MAIN

|                      |              |
|----------------------|--------------|
| Merchandise Amount   | 6,247.50 USD |
| Merchandise Receipt  | 4,998.00 USD |
| Merchandise Returned | 0.00 USD     |
| Merchandise Invoice  | 0.00 USD     |
| Merchandise Matched  | 0.00 USD     |

Lines Personalize | Find | View All | First 1 of 1 Last

Details Receipt Invoice **Matched** RIV

| Line | Item       | Item Description   | UOM | Qty Matched | Amt Matched | Currency |
|------|------------|--------------------|-----|-------------|-------------|----------|
| 1    | 7503532020 | STONE NO. 1, STONE | LTN | 0.0000      | 0.000       | USD      |

Return to Search Notify



# Reconciling/Close a PO (continued)

- For each line, enter the **Qty Received** from the **Receipt** tab on the **Activity Summary** in the **PO Qty** field.
- Click on the **Schedule** icon.

Maintain Purchase Order

## Purchase Order

Business Unit 50100 PO ID 0001143553

Copy From  ☐ Hold From Further Processing

PO Status Dispatched ▲ ✖

**Header** ?

\*PO Date 01/09/2017  Supplier Search

\*Supplier LL CARTER -003  Supplier Details

\*Supplier ID 0000033093  LL Carter & Son Inc

\*Buyer GEORGE.MASON  MASON,GEORGE

PO Reference Stone

Web IMS?: ☐

Header Details  
PO Defaults  
PO Activities  
Requisitions  
▼ Actions

Activity Summary  
Add Comments  
Add ShipTo Comments  
Document Status

Backorder Status Not Backordered [Create BackOrder](#)

Receipt Status Partial

\*Dispatch Method Print

eVA PO Type R01  Routine Bill Vendor

\*eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dttm

**Amount Summary** ?

|                   |              |  |
|-------------------|--------------|--|
| Merchandise       | 6,247.50     | <input type="button" value="Calculate"/> |
| Freight/Tax/Misc. | 0.00         |  |
| Total Amount      | 6,247.50 USD |  |

**Add Items From** ?

Catalog Item Search

**Select Lines To Display** ?

Search for Lines Line  To

**Lines** ?

Personalize | Find | View All |   First 1 of 1 Last

| Details | Ship To/Due Date | Statuses           | Item Information | Attributes | RFQ      | Contract | Receiving          |          |
|---------|------------------|--------------------|------------------|------------|----------|----------|--------------------|----------|
| Line    | Item             | Description        | PO Qty           | UOM        | Category | Price    | Merchandise Amount | Status   |
| 1       | 7503532020       | STONE NO. 1, STONE | 200              | TN         | 7503532  | 24.99000 | 6,247.50           | Approved |

\*Go to  More ...

View Approvals



# Reconciling/Close a PO (continued)

- A change order confirmation message is displayed. This message is displayed when the purchase order is being changed but the blue triangle was not used to create the change order.
- Click **Yes**. The **Maintain Purchase Order – Schedules** page will display.
- The **Schedules** are displayed.
- Verify that the **PO Qty** field on each schedule matches the changes just made on the on the **Purchase Order** page to the **PO Qty** field.
- Click the **Distribution** icon on the first line. The **Maintain Purchase Order - Distributions for Schedule X** pop-up window is displayed.
  - Click the **Distribution** icon for each line.

Message

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.

Favorites ▾

Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

Schedules

Unit 50100 Supplier LL CARTER -003 PO Status Dispatched  
PO ID 0001143553 PO Date 01/09/2017

[Return to Main Page](#)

Lines

Find | View All First 1 of 1 Last

| Line 1   | Item 7503532020 | STONE NO. 1, STONE | PO Qty 200.0000 | LTNMerchandise Amt 4,998.00 USD |                    |           |          |         |       |                    |        |  |  |  |   |            |            |          |          |          |        |  |  |  |
|--|-----------------|--------------------|-----------------|---------------------------------|--------------------|-----------|----------|---------|-------|--------------------|--------|--|--|--|---|------------|------------|----------|----------|----------|--------|--|--|--|
| <div>Schedules</div> <div>Personalize   Find   View All   First 1 of 1 Last</div> <table><thead><tr><th>Sched</th><th>*Due Date</th><th>*Ship To</th><th>*PO Qty</th><th>Price</th><th>Merchandise Amount</th><th>Status</th><th></th><th></th><th></th></tr></thead><tbody><tr><td>1</td><td>01/09/2017</td><td>CNTRL OFF3</td><td>200.0000</td><td>24.99000</td><td>4,998.00</td><td>Active</td><td></td><td></td><td></td></tr></tbody></table> |                 |                    |                 |                                 | Sched              | *Due Date | *Ship To | *PO Qty | Price | Merchandise Amount | Status |  |  |  | 1 | 01/09/2017 | CNTRL OFF3 | 200.0000 | 24.99000 | 4,998.00 | Active |  |  |  |
| Sched  | *Due Date       | *Ship To           | *PO Qty         | Price                           | Merchandise Amount | Status    |          |         |       |                    |        |  |  |  |   |            |            |          |          |          |        |  |  |  |
| 1  | 01/09/2017      | CNTRL OFF3         | 200.0000        | 24.99000                        | 4,998.00           | Active    |          |         |       |                    |        |  |  |  |   |            |            |          |          |          |        |  |  |  |

Add ShipTo Comments



# Reconciling/Close a PO (continued)

- Verify that the **PO Qty** field on each distribution line matches the changes made to the **PO Qty** field on the on the **Schedules** page and the **Purchase Order** page.
- Click **OK**. The **Maintain Purchase Order – Schedules** page will display.

Distributions for Schedule 1

Unit 50100 Supplier LL CARTER -003  
PO ID 0001143553 Item 7503532020 **STONE NO. 1, STONE**  
Line 1  
Schedule 1 Status Active

\*Distribute By

SpeedChart  Multi-SpeedCharts

Schedule Qty 200.0000  
Merchandise Amount 4,998.00 USD  
Doc. Base Amount 4,998.00 USD

**Distribution** Personalize | Find | View All | First 1 of 1 Last

| Dist | Status | Percent  | PO Qty   | Merchandise Amount | Currency | *GL Unit | Entry Event | *Account | Fund  | Program | Department |
|------|--------|----------|----------|--------------------|----------|----------|-------------|----------|-------|---------|------------|
| 1    | Open   | 100.0000 | 200.0000 | 4,998.00           | USD      | 50100    |             | 5012550  | 04100 | 699001  | 10003      |

OK Cancel Refresh





# Reconciling/Close a PO (continued)

- Click on the **Return to Main Page** hyperlink. The **Maintain Purchase Order – Purchase Order** page will display.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

Maintain Purchase Order

Schedules

Unit 50100

Supplier LL CARTER -003

PO Status Dispatched

PO ID 0001143553

PO Date 01/09/2017

Return to Main Page

Lines

Find | View AllFirst1 of 1Last

Line 1

Item 7503532020

STONE NO. 1, STONE

PO Qty 200.0000

LTN Merchandise Amt 4,998.00 USD

Schedules

Personalize | Find | View All | [Print] [Calendar]

First1 of 1Last

Details

Statuses

Shipment

Matching

Receiving

Freight

RTV

[More]

| Sched | *Due Date  | *Ship To   | *PO Qty  | Price    | Merchandise Amount | Status |         |            |        |       |         |  |
|-------|------------|------------|----------|----------|--------------------|--------|---------|------------|--------|-------|---------|--|
| 1     | 01/09/2017 | CNTRL OFF3 | 200.0000 | 24.99000 | 4,998.00           | Active | [Print] | [Calendar] | [More] | [Add] | [Minus] |  |

Add ShipTo Comments

SaveReturn to SearchNotifyRefresh

AddUpdate/Display





# Reconciling/Close a PO (continued)

- Confirm that the **PO Qty** field for each line on the **Details** tab of the **Purchase Order** page still matches the changes made to the **PO Qty** field on the **Schedules** page and the **Distributions for Schedule X** page.

Maintain Purchase Order

## Purchase Order

Business Unit 50100 PO ID 0001143553

Copy From  ☐ Hold From Further Processing

PO Status Dispatched △ ×

**Header** ?

\*PO Date 01/09/2017  Supplier Search

\*Supplier LL CARTER -003  Supplier Details

\*Supplier ID 0000033093  LL Carter & Son Inc

\*Buyer GEORGE.MASON  MASON,GEORGE

PO Reference Stone

Web IMS?: ☐

[Header Details](#)  
[PO Defaults](#)  
[PO Activities](#)  
[Requisitions](#)  
[Actions](#)

[Activity Summary](#)  
[Add Comments](#)  
[Add ShipTo Comments](#)  
[Document Status](#)

Backorder Status Not Backordered [Create BackOrder](#)

Receipt Status Partial

\*Dispatch Method Print

eVA PO Type R01  Routine Bill Vendor

\*eVA Order Method PRNT

eVA Interfaced NSEV

eVA Dtm

**Amount Summary** ?

|                   |          |     |
|-------------------|----------|-----|
| Merchandise       | 6,247.50 |     |
| Freight/Tax/Misc. | 0.00     |     |
| Total Amount      | 6,247.50 | USD |

**Add Items From** ?

Catalog Item Search

**Select Lines To Display** ?

Search for Lines Line  To

**Lines** ?

Personalize | Find | View All |   First 1 of 1 Last

| Details | Ship To/Due Date | Statuses           | Item Information | Attributes | RFQ      | Contract | Receiving          |          |  |  |  |  |  |  |
|---------|------------------|--------------------|------------------|------------|----------|----------|--------------------|----------|--|--|--|--|--|--|
| Line    | Item             | Description        | PO Qty           | UOM        | Category | Price    | Merchandise Amount | Status   |  |  |  |  |  |  |
| 1       | 7503532020       | STONE NO. 1, STONE | 200              | LTN        | 7503532  | 24.99000 | 6,247.50           | Approved |  |  |  |  |  |  |

View Approvals  \*Go to  More ...



# Reconciling/Close a PO (continued)

Once the updates to the PO have been made it is important to ensure that the sum of accounting distribution matches the changes to the schedules. From the **Maintain Purchase Order – Purchase Order** page:

- Click on the **Details** tab.
- Click on the **Schedule** icon for the line to be reviewed. The **Schedules** page for the line will display. Review each line's accounting distribution.
- From the **Details** tab, click on the **Distribution** icon. The **Distributions for Schedule X** pop-up window will display.

**Maintain Purchase Order**  
**Purchase Order**

Business Unit 50100  
PO ID 0001143553

Copy From [ ]  
Hold From Further Processing

**Header**  
\*PO Date 01/09/2017  
\*Supplier LL CARTER -003  
\*Supplier ID 0000033093  
\*Buyer GEORGE.MASON  
PO Reference Stone  
Web IMS?: [ ]

Supplier Search  
Supplier Details  
LL Carter & Son Inc  
MASON,GEORGE

Backorder Status Not Backordered  
Receipt Status Partial  
\*Dispatch Method Print  
eVA PO Type R01  
\*eVA Order Method PRNT  
eVA Interfaced NSEV  
eVA Dttm

Amount Summary  
Merchandise 6,247.50  
Freight/Tax/Misc. 0.00  
Total Amount 6,247.50 USD

**Lines**  
Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving | [ ]  
Line 1 Item 7503532020 STONE NO. 1, STONE PO Qty 200 UOM LTN Category 7503532 Price 24.99000 Merchandise Amount 6,247.50 Status Approved

View Approvals  
Close Short All Lines  
\*Go to More ...

Save Return to Search Notify Refresh Add Update/Display

**Maintain Purchase Order**  
**Schedules**

Unit 50100  
PO ID 0001143553

Supplier LL CARTER -003  
PO Date 01/09/2017

PO Status Dispatched

**Lines**  
Find | View All | First | 1 of 1 | Last  
Line 1 Item 7503532020 STONE NO. 1, STONE PO Qty 200.0000 LTN Merchandise Amt 4,998.00 USD  
Schedules  
Details | Statuses | Shipment | Matching | Receiving | Freight | RTV | [ ]  
Sched \*Due Date \*Ship To \*PO Qty Price Merchandise Amount Status  
1 01/09/2017 CNTRL OFF3 200.0000 24.99000 4,998.00 Active

Add ShipTo Comments  
Save Return to Search Notify Refresh Add Update/Display



# Reconciling/Close a PO (continued)

The **Distributions for Schedule X** pop-up window will display:

- Verify or update the sum of the accounting distribution(s) to match the **Line Schedule**.
- Click **OK**. The **Schedules** page will display.

Distributions for Schedule 1

Unit 50100  
PO ID 0001143553  
Line 1  
Schedule 1

Supplier LL CARTER -003  
Item 7503532020  
STONE NO. 1, STONE  
Status Active

\*Distribute By Quantity

SpeedChart Multi-SpeedCharts

Schedule Qty 200.0000  
Merchandise Amount 4,998.00 USD  
Doc. Base Amount 4,998.00 USD

Distribution

| Dist | Status | Percent  | PO Qty   | Merchandise Amount | Currency | *GL Unit | Entry Event | *Account | Fund  | Program | Department |
|------|--------|----------|----------|--------------------|----------|----------|-------------|----------|-------|---------|------------|
| 1    | Open   | 100.0000 | 200.0000 | 4,998.00           | USD      | 50100    |             | 5012550  | 04100 | 699001  | 10003      |

OK Cancel Refresh

Maintain Purchase Order  
Schedules

Unit 50100  
PO ID 0001143553

Supplier LL CARTER -003  
PO Date 01/09/2017

PO Status Dispatched

Return to Main Page

Lines

| Line | Item       | Description        | PO Qty   | LTN Merchandise Amt |
|------|------------|--------------------|----------|---------------------|
| 1    | 7503532020 | STONE NO. 1, STONE | 200.0000 | 4,998.00 USD        |

Schedules

| Sched | *Due Date  | *Ship To   | *PO Qty  | Price    | Merchandise Amount | Status |
|-------|------------|------------|----------|----------|--------------------|--------|
| 1     | 01/09/2017 | CNTRL OFF3 | 200.0000 | 24.99000 | 4,998.00           | Active |

Add ShipTo Comments

Save Return to Search Notify Refresh

- Click on the **Return to Main Page** hyperlink. The **Purchase Order** page will display.
- Click **Save**. The **Change Reason** page will display.

Maintain Purchase Order  
Purchase Order

Business Unit 50100  
PO ID 0001143553

PO Status Dispatched

Copy From

Header

\*PO Date 01/09/2017  
Supplier Search  
\*Supplier LL CARTER -003  
Supplier Details  
\*Supplier ID 0000033093  
LL Carter & Son Inc  
\*Buyer GEORGE.MASON  
MASON,GEORGE  
PO Reference Stone  
Web IMS?:

Backorder Status Not Backordered  
Create BackOrder

Receipt Status Partial  
Dispatch Method Print  
Dispatch  
eVA PO Type R01  
Routine Bill Vendor  
eVA Order Method PRNT  
eVA interfaced NSEV  
eVA Dtm

Amount Summary

| Merchandise       | 6,247.50     |
|-------------------|--------------|
| Freight/Tax/Misc. | 0.00         |
| Total Amount      | 6,247.50 USD |

Calculate

Add Items From

Catalog Item Search

Select Lines To Display

Search for Lines Line To Retrieve

Lines

| Line | Item       | Description        | PO Qty | *UOM | Category | Price    | Merchandise Amount | Status   |
|------|------------|--------------------|--------|------|----------|----------|--------------------|----------|
| 1    | 7503532020 | STONE NO. 1, STONE | 200    | LTN  | 7503532  | 24.99000 | 6,247.50           | Approved |

View Approvals

Close Short All Lines

\*Go to More

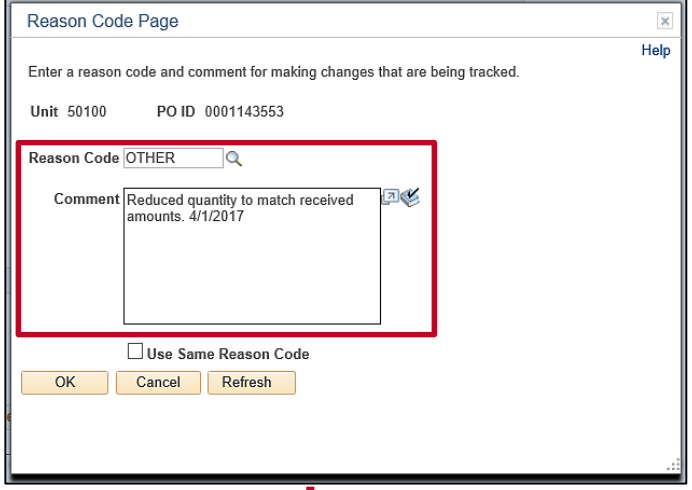
Save Return to Search Notify Refresh

Add Update/Display



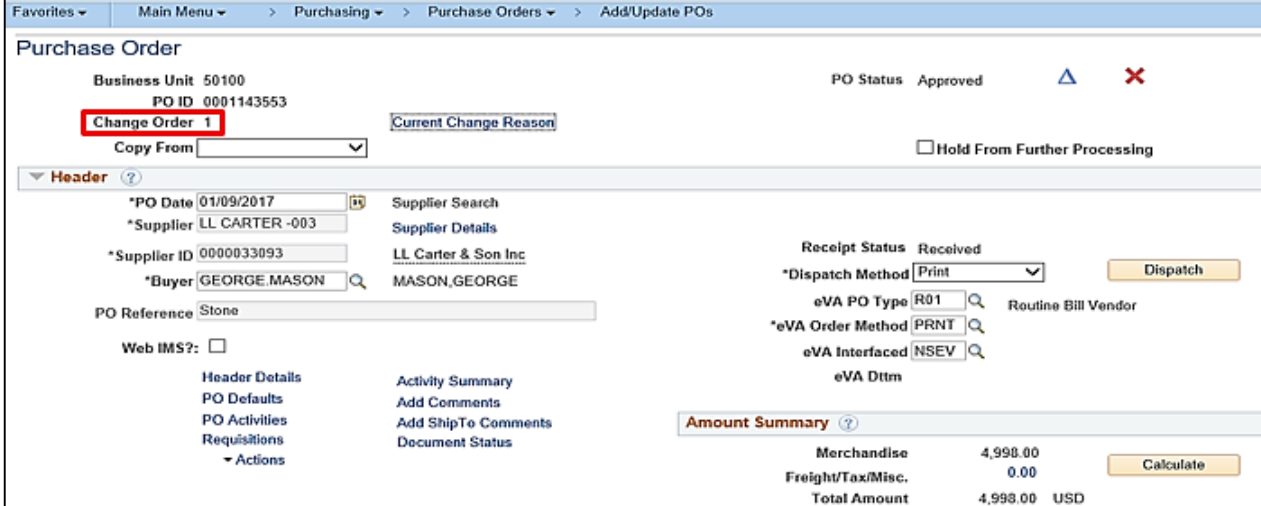
# Reconciling/Close a PO (continued)

- Enter/update the **Reason Code** and **Comment**.
- Click **OK**.
- The **Maintain Purchase Order – Purchase Order** page will display.



A dialog box titled "Reason Code Page" with a close button (X) in the top right corner. It contains a "Help" link. The text inside says "Enter a reason code and comment for making changes that are being tracked." Below this, it shows "Unit 50100" and "PO ID 0001143553". There is a "Reason Code" field with "OTHER" entered and a search icon. Below that is a "Comment" text area containing "Reduced quantity to match received amounts. 4/1/2017" and a save icon. At the bottom, there is a checkbox labeled "Use Same Reason Code" and three buttons: "OK", "Cancel", and "Refresh". A red rectangle highlights the "Reason Code" and "Comment" fields.

- The reconciliation changes have been saved.
- The **Change Order** field value is updated to 1.
- Click on the **PO Submit for Approval** checkbox (the green checkmark) which is next to the **PO Status** field.



A screenshot of the "Purchase Order" form. The breadcrumb trail at the top reads: "Favorites > Main Menu > Purchasing > Purchase Orders > Add/Update POs". The form title is "Purchase Order". It shows "Business Unit 50100" and "PO ID 0001143553". The "Change Order" field is highlighted with a red box and contains the value "1". There is a "Current Change Reason" field. Below this is a "Copy From" dropdown. The "PO Status" is "Approved", with a green checkmark icon and a red X icon. There is a checkbox for "Hold From Further Processing". The form is divided into sections: "Header" (with fields for PO Date, Supplier, Supplier ID, Buyer, and PO Reference), "Supplier Search" (with fields for Supplier Details and Supplier Name), "Receipt Status" (with fields for Dispatch Method, eVA PO Type, eVA Order Method, eVA Interfaced, and eVA Dttm), and "Amount Summary" (with fields for Merchandise, Freight/Tax/Misc., and Total Amount). A red arrow points from the "Reason Code Page" dialog box to the "Change Order" field.



# Reconciling/Close a PO (continued)

- The **PO Status** updates to **Approved** and is ready for dispatch.
- Once dispatched, either manually or by batch process, the PO will be reconciled/closed out.

Navigation: Favorites ▾ Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Add/Update POs

### Purchase Order

Business Unit 50100  
PO ID 0001143553  
Change Order 1 [Current Change Reason](#)  
Copy From  ☐ Hold From Further Processing

**PO Status** Approved

**Header** ?

\*PO Date 01/09/2017  Supplier Search  
\*Supplier LL CARTER -003 Supplier Details  
\*Supplier ID 0000033093 LL Carter & Son Inc  
\*Buyer GEORGE.MASON MASON,GEORGE  
PO Reference Stone  
Web IMS?: ☐

Receipt Status Received  
\*Dispatch Method Print   
eVA PO Type R01  Routine Bill Vendor  
\*eVA Order Method PRNT   
eVA Interfaced NSEV   
eVA Dttm

Header Details  
PO Defaults  
PO Activities  
Requisitions  
▼ Actions

Activity Summary  
Add Comments  
Add ShipTo Comments  
Document Status

**Amount Summary** ?

|                   |              |  |
|-------------------|--------------|--|
| Merchandise       | 4,998.00     | <input type="button" value="Calculate"/> |
| Freight/Tax/Misc. | 0.00         |  |
| Total Amount      | 4,998.00 USD |  |

**Add Items From** ?

Catalog Item Search

**Select Lines To Display** ?

Search for Lines Line  To

**Lines** ?

Personalize | Find | View All |   First 1 of 1 Last

| Details | Ship To/Due Date | Statuses           | Item Information | Attributes | RFQ      | Contract | Receiving          |          |                                  |                                  |                                  |
|---------|------------------|--------------------|------------------|------------|----------|----------|--------------------|----------|----------------------------------|----------------------------------|----------------------------------|
| Line    | Item             | Description        | PO Qty           | *UOM       | Category | Price    | Merchandise Amount | Status   |                                  |                                  |                                  |
| 1       | 7503532020       | STONE NO. 1, STONE | 200.0000         | LTN        | 7503532  | 24.99000 | 4,998.00           | Approved | <input type="button" value="Q"/> | <input type="button" value="Q"/> | <input type="button" value="Q"/> |

View Approvals  \*Go to ... More ...



## Lesson 4: Summary

4

Reconciling/Close the PO

In this lesson, you learned:

- How to reconcile/close a PO by matching the quantity ordered, quantity received, and quantity matched/vouchered for a PO.



# Lesson 5: Introduction

5

Review PO Information, History, and Activities

This lesson covers the following topics:

- Review PO Information, History, and Activities
- **Purchase Order Inquiry** page



# Review PO Information, History, and Activities

After creating a PO, it is possible to view all future transactions and related activities, including the header, line, schedule, and distribution details. This can be done through the following pages:

- **Purchase Order Inquiry** page
- **Activity Summary** page
- **Review Change History** and **Review Change Orders** pages





# Purchase Order Inquiry Page

The **Purchase Order Inquiry** page allows viewing details of the PO. This page is a display-only version of the **Maintain Purchase Order – Purchase Order** page. From here, other pages, such as **Activity Summary** and **Change Order** can be displayed, where additional details of the PO can be viewed.

Navigate to this page using the following path:

**Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders**

Enter the search criteria and click **Search**.

The screenshot displays the 'Purchase Order Inquiry' page. At the top, a breadcrumb trail reads: Favorites > Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. Below this, the page title 'Purchase Order Inquiry' and 'Purchase Order' are shown. Key fields include Business Unit (50100), PO ID (0001143553), Change Order (1), and PO Status (Approved). A 'Header' section contains details like PO Date (01/09/2017), Supplier Name (LL CARTER -003), Supplier ID (0000033093), Buyer (MASON, GEORGE), and PO Reference (Stone). An 'Amount Summary' table shows Merchandise (4,998.00), Freight/Tax/Misc. (0.00), and a Total of 4,998.00 USD. A 'Lines' table at the bottom lists one item: Line 1, Item ID 7503532020, Description STONE NO. 1, STONE, Category 7503532, PO Qty 200.0000, UOM LTN, Merchandise Amount 4,998.00 USD, and Status Approved. Navigation buttons like 'Return to Search', 'Notify', and 'Related Links' are at the bottom.

Business Unit: 50100 PO Status: Approved  
PO ID: 0001143553  
Change Order: 1

**Header**

PO Date: 01/09/2017  
Supplier Name: LL CARTER -003  
Supplier ID: 0000033093  
Buyer: MASON, GEORGE  
PO Reference: Stone

Backorder Status: Not Backordered  
Receipt Status: Received  
☐ Hold From Further Processing

**Amount Summary**

|                   |                     |
|-------------------|---------------------|
| Merchandise       | 4,998.00            |
| Freight/Tax/Misc. | 0.00                |
| <b>Total</b>      | <b>4,998.00 USD</b> |

**Lines**

| Line | Item ID    | Item Description   | Category | PO Qty   | UOM | Merchandise Amount | Status   |
|------|------------|--------------------|----------|----------|-----|--------------------|----------|
| 1    | 7503532020 | STONE NO. 1, STONE | 7503532  | 200.0000 | LTN | 4,998.00 USD       | Approved |

View Approvals  
Return to Search Notify Related Links



# Purchase Order Inquiry Page (continued)

Favorites ▾

Main Menu ▾

>

Purchasing ▾

>

Purchase Orders ▾

>

Review PO Information ▾

>

Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit 50100

PO ID 0001143553

Change Order 1

PO Status Approved

▼ Header

PO Date 01/09/2017

Supplier Name LL CARTER -003

Supplier ID 0000033093

Buyer MASON,GEORGE

PO Reference Stone

Backorder Status Not Backordered

Receipt Status Received

☐ Hold From Further Processing

Supplier Details

Amount Summary

Merchandise 4,998.00

Freight/Tax/Misc. 0.00

Total 4,998.00 USD

Header Details

Change Order

All RTV

Matching

Activity Summary

Header Comments

Document Status

▼ Actions

Lines

Personalize | Find | View All |

First 1 of 1 Last

| Line | Item ID    | Item Description   | Category | PO Qty   | UOM | Merchandise Amount | Status   |  |  |
|------|------------|--------------------|----------|----------|-----|--------------------|----------|--|--|
| 1    | 7503532020 | STONE NO. 1, STONE | 7503532  | 200.0000 | LTN | 4,998.00 USD       | Approved |  |  |

View Approvals

Return to Search

Notify

Related Links



# Purchase Order Inquiry Page: Supplier Details

Click the **Supplier Details** link on the **Purchase Order Inquiry** page to display the **Supplier Details** pop-up window. This page displays more details about the supplier for the PO.

Click the **Return** button on the page to return to the **Purchase Order Inquiry** page when you are done.

Supplier Details -- LL Carter & Son Inc

Help

Business Unit 50100

PO ID 0001143553

Change Order 1

Location MAIN

Terms 30

Net 30

Address 4

Show Address Details

Basis Date Type Prompt Payment

Contact

Show Contact Details

Basis Date

Salesperson

Show Salesperson Details

Address Details

Country USA United States

Fax 330/349-1341

Address 1 17460 Countyline Church Road

Prefix 1

Address 2

Phone 446/043-8809

eVA VLIN VA10051504

eVA Address ID: EVAAD227788

City Ruther Glen

County 077946325

Postal 22546

State VA

Virginia

Return



# Purchase Order Inquiry Page: Supplier Details (continued)

Supplier Details -- LL Carter & Son Inc

Help

|               |                          |                      |            |                 |                |
|---------------|--------------------------|----------------------|------------|-----------------|----------------|
| Business Unit | 50100                    | PO ID                | 0001143553 | Change Order    | 1              |
| Location      | MAIN                     | Terms                | 30         | Net             | 30             |
| Address       | 4                        | Show Address Details |            | Basis Date Type | Prompt Payment |
| Contact       | Show Contact Details     |                      | Basis Date |                 |                |
| Salesperson   | Show Salesperson Details |                      |            |                 |                |

Address Details

|                 |                              |               |        |              |
|-----------------|------------------------------|---------------|--------|--------------|
| Country         | USA                          | United States | Fax    | 330/349-1341 |
| Address 1       | 17460 Countyline Church Road |               | Prefix | 1            |
| Address 2       |                              |               | Phone  | 446/043-8809 |
| eVA VLIN        | VA10051504                   |               |        |              |
| eVA Address ID: | EVAAD227788                  |               |        |              |
| City            | Ruther Glen                  |               |        |              |
| County          | 077946325                    | Postal        | 22546  |              |
| State           | VA                           | Virginia      |        |              |

Return



# Purchase Order Inquiry Page: Header Details

Click the **Header Details** link on the **Purchase Order Inquiry** page to display the **Purchase Order Header Details** pop-up window. This page displays the PO defaults and the rules for the PO.

Click the **Return** button on the page to return to the **Purchase Order Inquiry** page when finished.

PO Header Details

Help

Business Unit 50100PO ID 0001143553Change Order 1

PO Details

Supplier LL Carter & Son Inc  
PO Date 01/09/2017Origin ONL Online  
PO Type GeneralID 546001730  
Billing Location CNTRL OFF3Billing AddressLetter of Credit ID

Currency

Currency Code USDExchange Rate DetailExchange Rate 1.00000000  
Rate Date 01/01/1901Base Currency USD  
Rate Type CRRNT

Process Control Option

☐ Hold From Further ProcessingMethod Print  
☒ Dispatch

Return



# Purchase Order Inquiry Page: Header Details (continued)

PO Header Details

Help

Business Unit 50100PO ID 0001143553Change Order 1

PO Details

Supplier LL Carter & Son Inc  
PO Date 01/09/2017Origin ONL Online  
PO Type GeneralID 546001730  
Billing Location CNTRL OFFBilling AddressLetter of Credit ID

Currency

Currency Code USDExchange Rate DetailExchange Rate 1.00000000  
Rate Date 01/01/1901Base Currency USD  
Rate Type CRRNT

Process Control Option

☐ Hold From Further ProcessingMethod Print  
☒ Dispatch

Return



# Purchase Order Inquiry Page: Bill To Address

Click the **Billing Address** link on the **Header Details** page to display details for the billing location. Click the **OK** button to return to the **Purchase Order Inquiry** page when review is completed.

PO Header Details - Bill To Address

Help

Location CNTRL OFF3

**Billing Address**

Address 1 VDOT Central Office

Address 2 1221 E. Broad St.

Address 3

Address 4

City Richmond

State VAPostal 23219

Country USA

OK

Cancel



# Purchase Order Inquiry Page: Header Comments

If the **Header Comments** link on the **Purchase Order Inquiry** page is active, click it to display comments associated with the PO header. If this link is not active, there are no comments.

Click the **OK** button to return to the **Purchase Order Inquiry** pop-up window.

PO Header Comments

Business Unit 50100 PO ID 0001143553 Supplier LL CARTER -003 Change Order 1

☒ Retrieve Active Comments Only

\*Sort Method  \*Sort Sequence

Comments Find | View All First 1 of 1 Last

Comment Status Active

This is CONFIRMING Purchase Order for Contract number UM512PMC100017 DO NOT DUPLICATE

☒ Send to Supplier ☐ Shown at Receipt  
☐ Shown at Voucher ☐ Approval Justification

Associated Document

Attachment   ☐ Email

From -> PO 50100-0001143553





# Purchase Order Inquiry Page: Change Order

Click the **Change Order** link on the **Purchase Order Inquiry** page to display the **Review Change Order** page. This page displays change order history for the PO, if any.

The **Change Order** page opens up as a separate internet tab. To return to the **Purchase Order Inquiry** page, click on the **Purchase Orders** internet tab or close the **Change Order** internet tab and return to the **Purchase Order Inquiry** page.

http://fn92trnweb.cov.virginia.gov/psp/fn92trn\_1/EMPLOYEE/EI

Purchase Orders

Review Change Orders

Favorites

Main Menu

Purchasing

Purchase Orders

Review PO Information

Purchase Orders

Review Change Orders

Header Changes

Line Changes

Ship Changes

Unit 50100

PO ID 0001143553

Changes to PO Schedules

Personalize | Find | View All | 1-5 of 12 | Last

| Line | Sched | Batch | Seq | Description           | Value      |        | User Modify  | Last Change Date     |
|------|-------|-------|-----|-----------------------|------------|--------|--------------|----------------------|
| 1    | 1     | 0     | 0   | Status                | A          | Reason | GEORGE.MASON | 01/14/2017 3:06:17PM |
| 1    | 1     | 0     | 0   | Due Date              | 01/09/2017 | Reason | GEORGE.MASON | 01/14/2017 3:06:17PM |
| 1    | 1     | 0     | 0   | Freight Terms Code    | FOB DEST   | Reason | GEORGE.MASON | 01/14/2017 3:06:17PM |
| 1    | 1     | 0     | 0   | Merchandise Amount    | 6247.50000 | Reason | GEORGE.MASON | 01/14/2017 3:06:17PM |
| 1    | 1     | 0     | 0   | Original Promise Date | 01/09/2017 | Reason | GEORGE.MASON | 01/14/2017 3:06:17PM |

Return to Search

Notify

Header Changes

Line Changes

Ship Changes



# Purchase Order Inquiry Page: Document Status

Click the **Document Status** link on the **Purchase Order Inquiry** page to access and review information about procurement documents associated with the PO. These documents may include contracts, vouchers, receipts, and payments and links to each of the associated documents will be available.

The **Document Status** page opens up as a separate internet tab. To return to the **Purchase Order Inquiry** page, click on the **Purchase Orders** internet tab or close the **Document Status** internet tab and return to the **Purchase Order Inquiry** page.

http://fn92trnweb.cov.virginia.gov/psp/fn92trn\_2/EMPLOYEE/EI

Purchase Orders

Document Status

Document Status

Business Unit 50100

Document Date 01/09/2017

Currency USD

Buyer MASON,GEORGE

PO ID 0001143553

Status Approved

Document Type Purchase Order

Merchandise Amt 4,998.00

Requisitions

Sourcing Events

Procurement Contracts(1)

Purchase Orders

Service Work Orders

Receipts(1)

Returns

Vouchers

Payments

Show All

Associated Document

Personalize | Find | View All | 1-2 of 2 | Last

| Actions   | SetID | Business Unit | Document Type | DOC ID                   | Status   | Document Date | Supplier ID | Location |  |
|-----------|-------|---------------|---------------|--------------------------|----------|---------------|-------------|----------|--|
| ▼ Actions | STATE |               | Contract      | 000000000000000000044966 | Approved | 07/14/2016    | 0000033093  |          |  |
| ▼ Actions |       | 50100         | Receipt       | 0001884215               | Received | 01/09/2017    | 0000033093  | MAIN     |  |

Return to Search



# Purchase Order Inquiry Page: Lines

There are numerous details associated with the PO line that can be displayed from the **Lines** section on the **Purchase Order Inquiry** page.

Favorites ▾Main Menu ▾Purchasing ▾Purchase Orders ▾Review PO Information ▾Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit 50100PO ID 0001201019

PO Status Approved

Header

PO Date 08/06/2019

Supplier Name VULCAN CON-001

Supplier ID 0000009329

Buyer Hodge, Ronnie (VDOT)

PO Reference FOB STONE

Supplier Details

Header Details

All RTV

Matching

Activity Summary

Header Comments...

Document Status

Actions

Backorder Status Not Backordered

Receipt Status Not Recvd

Hold From Further Processing

Amount Summary

Merchandise10,237.50

Freight/Tax/Misc.0.00

Total10,237.50 USD

Lines

Personalize | Find | View All | 1 of 4 | First 1-4 of 4 Last

| Line | Item ID    | Item Description        | Category | PO Qty   | UOM | Merchandise Amount | Status   |  |  |  |
|------|------------|-------------------------|----------|----------|-----|--------------------|----------|--|--|--|
| 1    | 7503532030 | STONE NO. 3, STONE      | 7503532  | 175.0000 | LTN | 1,925.00 USD       | Approved |  |  |  |
| 2    | 7503548485 | STONE, CRUSHED GRADE 26 | 7503548  | 250.0000 | LTN | 1,762.50 USD       | Approved |  |  |  |
| 3    | 7503518200 | STONE, RIP RAP CLASS 1  | 7503518  | 100.0000 | LTN | 1,800.00 USD       | Approved |  |  |  |
| 4    | 7503551400 | STONE RIP RAP CLASS II  | 7503551  | 250.0000 | LTN | 4,750.00 USD       | Approved |  |  |  |

View Approvals

Return to SearchPrevious in ListNext in ListNotifyRelated Links



# Purchase Order Inquiry Page: Line Details

When the **Line Details** icon in the **Lines** section of the **Purchase Order Inquiry** page, is clicked, the **Details for Line** pop-up window will be displayed. This page displays additional details associated with the selected PO line. Click the **Return** button to return to the **Purchase Order Inquiry** page.

Details for Line VULCAN CON-001

PO ID 0001201019

Line 1

STONE NO. 3 STONE

Status Approved

☐ Amount Only

Backorder Status Not Backordered

Line Details

Physical Nature Goods

Merchandise Amt 1,925.00

Category 7503532

STONE

Contract SetID STATE

Contract 0000000000000000000045275

Contract Line 2

Group ID

Release 276

RFQ ID

Supplier Item ID

Supplier's Catalog

GPO Contract

Manufacturer ID

Mfg Item ID

Price Qty Line

☐ Withholding

Receiving Required Required

☐ Inspect

Configuration Code

Currency USD

Category ID 03113

Version 3

Category Line

Original Substituted Item

Description

RFQ Line

GPO ID

UPN Type

UPN ID

Price Date PO

☐ Device Tracking

Replenish Code Standard

Inspect ID



# Purchase Order Inquiry Page: Item Description

The **Item Description** for a **Line** on the **Purchase Order Inquiry** page includes only the first 30 characters of the item's full description.

By clicking on the **Item Description** link for the desired line, the **Item Description** pop-up window will be displayed with the full **Transaction Item Description** text.

Click the **Return** button to return to the **Purchase Order Inquiry** page.

Item Description

Item ID 7503532030

Transaction Item Description

STONE NO. 3, STONE

Preferred Language Item Descr

STONE NO. 3, STONE

Return



# Purchase Order Inquiry Page: Line Comments

From the **Purchase Order Inquiry** page, click the **Line Comments** icon on the desired line to view comments that were entered for the item. The **PO Line Comments** pop-up window will be displayed. From the **PO Line Comments** page, click **OK** to return to the **Purchase Order Inquiry** page.

**PO Line Comments**

Business Unit 50100      PO ID 0001201019      Supplier VULCAN CON-001

☒ Retrieve Active Comments Only      **Retrieve**

\*Sort Method       \*Sort Sequence       **Sort**

**Comments**      Find | View All      First ◀ 1 of 1 ▶ Last

Comment Status Active

☐ Send to Supplier      ☐ Shown at Receipt

☐ Shown at Voucher

**Associated Document**

Attachment      **Attach**      **View**      ☐ Email

From -> PO 50100-0001201019-1

**OK**      **Cancel**



# Purchase Order Inquiry Page: Schedule

There are many details associated with the schedule(s) for each PO line. To display the PO schedule(s) for a line, from the **Purchase Order Inquiry** page click the **Schedule Details** icon on the line to be viewed. The **Schedules** page displays for the PO line. Each schedule has links (icons) to more detailed information including schedule details, miscellaneous charges, and accounting distributions. The **Price Adjustment**, **Miscellaneous Charges**, and **Sched Sales/Use** tax icons are generally not used.

Favorites

Main Menu

Purchasing

Purchase Orders

Review PO Information

Purchase Orders

New WindowPersonalize Page

Purchase Order Inquiry

Schedules

Business Unit 50100PO ID 0001201019

Return to Main Page

Lines

FindView AllFirst1 of 4Last

| Line   | 1          | STONE NO. 3, STONE | PO Qty   | 175.0000   | LTN          | Merchandise Amt | 1,925.00 | USD                |        |          |          |          |         |              |        |       |                    |        |   |            |  |  |            |  |          |          |              |        |
|--|------------|--------------------|----------|------------|--------------|-----------------|----------|--------------------|--------|----------|----------|----------|---------|--------------|--------|-------|--------------------|--------|---|------------|--|--|------------|--|----------|----------|--------------|--------|
| <div>Schedules<div>PersonalizeFindView AllFirst1 of 1Last</div><div>DetailsStatuses</div><table><thead><tr><th>Sched</th><th>Due Date</th><th>Time Due</th><th>Revision</th><th>Ship To</th><th>Attention To</th><th>PO Qty</th><th>Price</th><th>Merchandise Amount</th><th>Status</th></tr></thead><tbody><tr><td>1</td><td>08/06/2019</td><td></td><td></td><td>MONTER AHQ</td><td></td><td>175.0000</td><td>11.00000</td><td>1,925.00 USD</td><td>Active</td></tr></tbody></table></div> |            |                    |          |            |              |                 |          |                    | Sched  | Due Date | Time Due | Revision | Ship To | Attention To | PO Qty | Price | Merchandise Amount | Status | 1 | 08/06/2019 |  |  | MONTER AHQ |  | 175.0000 | 11.00000 | 1,925.00 USD | Active |
| Sched  | Due Date   | Time Due           | Revision | Ship To    | Attention To | PO Qty          | Price    | Merchandise Amount | Status |          |          |          |         |              |        |       |                    |        |   |            |  |  |            |  |          |          |              |        |
| 1  | 08/06/2019 |                    |          | MONTER AHQ |              | 175.0000        | 11.00000 | 1,925.00 USD       | Active |          |          |          |         |              |        |       |                    |        |   |            |  |  |            |  |          |          |              |        |

Ship To Comments

Return to SearchPrevious in ListNext in ListNotify



# Purchase Order Inquiry Page: Schedule Details

From the **Purchase Order Inquiry – Schedules** page, click the **Schedule Details** icon for the desired schedule to view details about the schedule, including the **Freight Terms**.

To return to the **Purchase Order Inquiry** page, click **Return** and then from the **Schedules** page click the **Return to Main Page** link.

Details for Schedule 1

PO ID 0001201019

Status Active

Line Number 1

Schedule 1

Item ID 7503532030

Backordered From Schedule

STONE NO. 3, STONE

Schedule Details

Due Date 08/06/2019

Original Promise Date 08/06/2019

Ship Date

Ship To MONTER AHQ

Ship Via COMMON Common Carrier

Freight Terms FOB DEST FOB Dest, Freight Prepaid

Matching Full Match

Match Status PO Not Matched

☐ Custom Price - No Override

☐ No Charge

☐ Frozen (Planning)

Amount Summary

PO Qty 175.0000

Merchandise Amount 1,925.00 USD

Doc. Base 1,925.00 USD

Matching Controls

Tolerance Over

Tolerance Under

Unit Price Tolerance

% Unit Price Tolerance 0.01

Ext Price Tolerance

% Ext Price Tolerance 10.50

999.99

999.99

Receiving Controls

☒ Reject Qty Over Tolerance

Early Ship Reject Days 2

Qty Rcvd Tolerance % 10.00

Close Under Qty %

Freight Calculation Rule

Arbitration Plan ID

Freight Charge Method

☐ Freight Charge Override

Return





# Purchase Order Inquiry Page: Distributions

Accounting distributions are associated with schedules. Clicking the **Distributions/ChartFields** icon on the **Schedules** page displays the associated distributions.

The **ChartFields** tab displays the chart of accounts information related to the schedule. Typically scrolling right will display all the fields.

The **Details/Tax** and **Asset Information** tabs are not used.

Distributions for Schedule 1

PO ID 0001201019

Line 1

Sched 1

Item 7503532030

STONE NO. 3, STONE

Status Active

Sched Qty 175.0000

Distribute By Quantity

Merchandise Amount 1,925.00 USD

Doc. Base Amount 1,925.00 USD

Distributions

Chartfields

Details/Tax

Asset Information

Req Detail

| Dist | Status | Percent  | PO Qty   | Merchandise Amt | GL Unit | Entry Event | Account | Fund  | Program | Department | Cost Center | Task  | FIPS | Asset | Agency Use 1 | Agency Use 2 |
|------|--------|----------|----------|-----------------|---------|-------------|---------|-------|---------|------------|-------------|-------|------|-------|--------------|--------------|
| 1    | Open   | 100.0000 | 175.0000 | 1,925.00        | USD     | 50100       | 5013560 | 04100 | 604003  | 18042      | 11163550    | 74759 | 091  | 10289 |              |              |



# Purchase Order Inquiry Page: Distributions, Req/Detail Tab

On the **Distributions** page, the **Req/Detail** tab displays information about associated requisitions. If there is a requisition, the **Req ID** is displayed here as a hyperlink. Click to get more information about the requisition.

**Distributions for Schedule 1**

PO ID 0001201019

Line 1

Sched 1

Item 7503532030

STONE NO. 3, STONE

Status Active

Sched Qty 175.0000

Distribute By Quantity

Merchandise Amount 1,925.00 USD

Doc. Base Amount 1,925.00 USD

**Distributions**

Personalize | Find | View All | | First 1 of 1 Last

Chartfields

Details/Tax

Asset Information

**Req Detail**

| Dist | Status | Percent  | Req BU | Req ID | Req Line | Req Sched | Req Dist | Requester | Requisition Name | Attention To | Phone | Fax |
|------|--------|----------|--------|--------|----------|-----------|----------|-----------|------------------|--------------|-------|-----|
| 1    | Open   | 100.0000 |        | Req ID |          |           |          |           |                  |              |       |     |

**Return**



# Activity Summary Page

View what has been received on the **Activity Summary** page, you can view what has been received. The page will include information as well as links to more information for the associated receipt(s) and voucher(s).

The **Merchandise Amount**, **Merchandise Receipt**, **Merchandise Returned**, **Merchandise Invoice**, and **Merchandise Matched** values will be displayed on the **Activity Summary** page.

Navigate to this page using the following path:

**Main Menu > Purchasing > Purchase Orders > Review PO Information > Activity Summary**

Or, from the **Purchase Order Inquiry** page, you can click on the **Activity Summary** link.

**Activity Summary**

Business Unit 50100  
Purchase Order 0001201019  
Merchandise Amount 10,237.50 USD  
Merchandise Receipt 0.00 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 0.00 USD  
Merchandise Matched 0.00 USD

PO Status Approved  
Supplier Vulcan Construction Materials  
Supplier Location MAIN

**Lines**

| Line | Line Details | Item       | Item Description        | UOM | Manufacturer ID | Mfg Item ID | UPN |
|------|--------------|------------|-------------------------|-----|-----------------|-------------|-----|
| 1    |              | 7503532030 | STONE NO. 3, STONE      | LTN |                 |             |     |
| 2    |              | 7503548485 | STONE, CRUSHED GRADE 26 | LTN |                 |             |     |
| 3    |              | 7503518200 | STONE, RIP RAP CLASS 1  | LTN |                 |             |     |
| 4    |              | 7503551400 | STONE RIP RAP CLASS II  | LTN |                 |             |     |

Return to Search Notify



# Activity Summary Page (continued)

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Review PO Information ▾ > Purchase Orders > Activity Summary

Activity Summary

Business Unit 50100

PO Status Approved

Supplier Vulcan Construction Materials

Supplier Location MAIN

Purchase Order 0001201019

Merchandise Amount 10,237.50 USD

Merchandise Receipt 0.00 USD

Merchandise Returned 0.00 USD

Merchandise Invoice 0.00 USD

Merchandise Matched 0.00 USD

Lines

Personalize | Find | View All | First 1-4 of 4 Last

Details Receipt Invoice Matched RTV

| Line | Line Details | Item       | Item Description        | UOM | Manufacturer ID | Mfg Itm ID | UPN |
|------|--------------|------------|-------------------------|-----|-----------------|------------|-----|
| 1    |              | 7503532030 | STONE NO. 3, STONE      | LTN |                 |            |     |
| 2    |              | 7503548485 | STONE, CRUSHED GRADE 26 | LTN |                 |            |     |
| 3    |              | 7503518200 | STONE, RIP RAP CLASS 1  | LTN |                 |            |     |
| 4    |              | 7503551400 | STONE RIP RAP CLASS II  | LTN |                 |            |     |

Return to Search

Notify

123



# Activity Summary Page: Receipt Tab

The **Receipt** tab is used to view additional information about receipt documents associated with the PO, such as quantity received and accepted. Click a **Receipt** icon to open the page that provides a list of all receipts and links that take you to a **Receipts** page to view detailed receipt information.


Activity Summary

Business Unit 50100 PO Status Compl  
Purchase Order 0001186712 Supplier LL Carter & Son Inc  
Supplier Location MAIN

Merchandise Amount 11,310.00 USD  
Merchandise Receipt 11,357.51 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 11,357.51 USD  
Merchandise Matched 11,357.50 USD

Lines Personalize | Find | View All | First 1 of 1 Last

Details Receipt Invoice Matched RTV

| Line | Line Details | Item       | Item Description       | UOM | Qty eptd | Open Quantity | Open Amount | Currency |   |
|------|--------------|------------|------------------------|-----|----------|---------------|-------------|----------|---|
| 1    |              | 7503551310 | STONE RIP RAP CLASS AI | LTN | 1.2600   | 0.0000        | 0.000 USD   |          |  |

Return to Search Previous in List Next in List Notify

Unit 50100

PO ID 0001186712

Line 1

Item ID 7503551310

Receipt

Personalize

Find

View All

First

1-6 of 7

Last

| Sched Num | BU Recv | Receipt No | Receipt Line | Status   | Seq | Supp Rcpt Qty | Supp Reject Qty | Merchandise Amt | Currency |   |   |
|-----------|---------|------------|--------------|----------|-----|---------------|-----------------|-----------------|----------|---|---|
| 1         | 50100   | 0002080647 | 1            | Received | 1   | 46.3100       | 0.0000          | 1745.890        | USD      | + | - |



# Activity Summary Page: Invoice Tab

The **Invoice** tab is used to view additional information about vouchers associated with the PO. Click an **Invoice** icon to open the page that provides a list of all the vouchers and links to a **Voucher Inquiry** page where to view detailed voucher information.


Activity Summary

Business Unit 50100 PO Status Compl  
Purchase Order 0001186712 Supplier LL Carter & Son Inc  
Supplier Location MAIN

Merchandise Amount 11,310.00 USD  
Merchandise Receipt 11,357.51 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 11,357.51 USD  
Merchandise Matched 11,357.50 USD

Lines Personalize | Find | View All | First 1 of 1 Last

Details Receipt **Invoice** Matched RTV

| Line | Line Details | Item       | Item Description       | UOM | ed<br>ity | Un-invoiced<br>Amount | Currency | Invoice   |
|------|--------------|------------|------------------------|-----|-----------|-----------------------|----------|---|
| 1    |              | 7503551310 | STONE RIP RAP CLASS AI | LTN | 3000      | 0.000                 | USD      |  |

Return to Search Previous in List Next in List Notify

Unit 50100 PO No. 0001186712 Line 1 Item ID 7503551310

**Invoice** Personalize | Find | View All | First 1-6 of 7 Last

| Sched<br>Num | AP Unit | Voucher  | Line | Quantity Invoiced | Amount Invoiced |   |   |
|--------------|---------|----------|------|-------------------|-----------------|---|---|
| 1            | 50100   | 00939183 | 1    | 46.5200           | 1753.800        | + | - |



# Review Change History and Review Change Orders Pages

Review the history (changes) of a purchase order on the **Review Change History** page or the **Review Change Orders** page.

Both pages allow searching for the desired PO and lists the change(s) that occurred to it on tabs which are almost identical. On the **Review Change History** page, you can search using **PO Number** and/or **Change Order Number**. This page provides details on the original PO, as well as changes.

The information is virtually the same on both pages, however the **Review Change History** page contains a **Batch** tab that is not included on the **Review Change Orders** page. The **Batch** tab displays the date that the change was made and the **Batch** ID of the batch that created the change order.

Navigate to the **Review Change History** page using the following path:

**Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change History**

Or, navigate to the **Review Change Orders** page using the following path:

**Main Menu > Purchasing > Purchase Orders > Manage Change Orders > Review Change Orders**

Enter the search criteria on either page and click **Search**.



# Review Change History Page: Batch Tab

The **Review Change History** page includes four tabs that display different information about the change to the PO.

The **Batch** tab displays the date that the change was made and the **Batch** ID of the batch that created the change order.

Favorites ▾

Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Manage Change Orders ▾ > Review Change History

Batch

Header Changes

Line Changes

Ship Changes

Unit 50100

PO ID 0001201074

Batch

Find | View All

First ◀ 1 of 1 ▶ Last

Batch 1

Revision Date 08/07/2019

Return to Search

Previous in List

Next in List

Notify

Batch

Header Changes

Line Changes

Ship Changes





# Review Change History Page: Header Changes Tab

The **Header Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays the changes to the header, which user issued the change, and the date of change.

Favorites ▾Main Menu ▾Purchasing ▾Purchase Orders ▾Manage Change Orders ▾Review Change History

Batch

Header Changes

Line Changes

Ship Changes

Unit 50100PO ID 0001201074

PO Header

Personalize | Find | View All |

First 1-3 of 3 Last

| Batch | Seq | Description      | Value      |       | User Modify  | Last Change Date      |
|-------|-----|------------------|------------|-------|--------------|-----------------------|
| 1     | 1   | Billing Location | APPOMT ROS | OTHER | NINA.PATRICK | 08/07/2019 12:33:33PM |
| 1     | 1   | Change Type      | C          | OTHER | NINA.PATRICK | 08/07/2019 12:33:33PM |
| 1     | 1   | PO Status        | A          | OTHER | NINA.PATRICK | 08/07/2019 12:33:33PM |

Return to Search

Previous in List

Next in List

Notify

Batch | Header Changes | Line Changes | Ship Changes



# Change History Page: Line Changes Tab

The **Line Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays the changes to the PO line(s), the user who created the change, and the date of change.

Favorites ▾Main Menu ▾ > Purchasing ▾ > Purchase Orders ▾ > Manage Change Orders ▾ > Review Change History

Batch

Header Changes

Line Changes

Ship Changes

Unit 50100PO ID 0001201074

Changes to PO Lines

Personalize | Find | View All | |

First ◀ 1 of 1 ▶ Last

| Line | Batch | Seq | Description | Value | User Modify | Last Change Date |
|------|-------|-----|-------------|-------|-------------|------------------|
| 1    | 0     | 0   |             |       |             |                  |

Return to Search

Notify

Batch | Header Changes | Line Changes | Ship Changes



# Change History Page: Ship Changes Tab

The **Ship Changes** tab is on both the **Review Change History** and **Review Change Orders** pages and displays changes to the quantity and/or price, the user who created the change, and the date of change.

Favorites ▾Main Menu ▾> Purchasing ▾> Purchase Orders ▾> Manage Change Orders ▾> Review Change History

BatchHeader ChangesLine ChangesShip Changes

Unit 50100PO ID 0001201074

Changes to PO SchedulesPersonalize | Find | View All | 1 of 1 Last

| Line | Sched | Batch | Seq | Description | Value | User Modify | Last Change Date |
|------|-------|-------|-----|-------------|-------|-------------|------------------|
| 1    | 1     | 0     | 0   |             |       |             |                  |

Return to SearchPrevious in ListNext in ListNotify

Batch | Header Changes | Line Changes | Ship Changes



## Lesson 5: Summary

5

### Review PO Information, History, and Activities

In this lesson, you learned:

- How to view details of a PO using the Purchase Order Inquiry.
- How to review the change order history of a PO using the Review Change History and Review Change Orders pages.



# Course Summary

PR344

## Processing Purchase Orders

In this course, you learned:

- Describe Purchase Order Concepts, Processes, Integration, and Interfaces
- Create Purchase Orders
- Review and Manage Purchase Orders
- Cancel Purchase Orders
- Create a Purchase Order Change Order
- Reconcile/Close POs – 3 Way Match



# Course Evaluation

Congratulations! You successfully completed the **501 PR344: Processing Purchase Orders** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





# Appendix

- Key Terms
- Flowchart Key



# Key Terms

**Change Order:** A change order is created when you make a change to a PO that affects the **Quantity**, **Price**, or **Ship To** fields or when a **Line** is added.



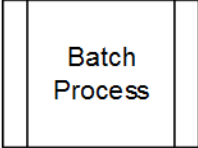
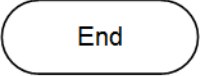
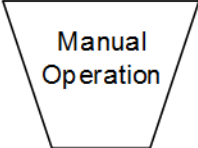
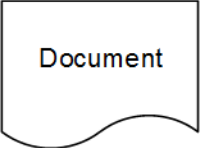
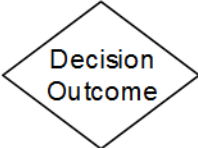
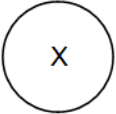
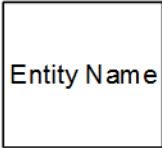
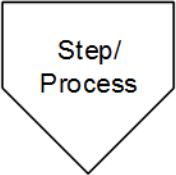
**Matching:** Matching purchasing documents for key values lends assurance to the validity and correctness of transactions and cash payments. The matching process compares vouchers with POs and receiving documents. This helps ensure that you pay for only the goods and services that you order and receive.

**Purchase Order:** Purchase Orders (POs) are commitments from an agency to suppliers to purchase goods or services from that supplier. The purchase information, such as item, quantity, freight terms, shipping terms, payments terms, and shipping instructions, is listed on the document and is part of the contractual nature of the PO.





# Flowchart Key

|   |  |   |   |
|---|--|---|---|
|    | Depicts a process step or interface.   |    | Indicates point at which the process begins. Does not represent any activity.   |
|    | Specifies a batch process.   |    | Indicates point at which the process ends. Does not represent any activity.   |
|    | Depicts a process step that is preformed manually.   |    | Depicts a document of any kind, either electronic or hard copy.   |
|   | Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding. |   | Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page. |
|  | Represents an entity (person, organization, etc.).   |  | Connects steps between business processes.  |