WOI Enabling - purchase order

This image shows the various function buttons available to work with, **Open**, **View Printer Friendly**, **Create invoice from purchase order** and **Delete**. **Image 1**



The purchase order functions and their corresponding buttons are:

- Purchase order View (View printer friendly button).
- Purchase order List changes (View change summary button).
- Purchase order Accept/reject (I accept purchase order and I do not accept purchase order buttons).
- Purchase order Accept/reject changes (I accept all changes and I do not accept all changes buttons).
- Invoice Create from PO (Create invoice from purchase order button).



Open a purchase order

Select the purchase order number by selecting in the radio button and select **Open** (as shown in the above image). Opening a purchase order allows the following functions to be performed:

- · Accept or reject the PO.
- · View the PO.
- · View the items in the PO.
- Create an invoice from the PO.

Purchase order details screen

This is an open purchase order. On the top part you see the **Purchase order number, Supplier number, Payment terms, Date**, etc. The function buttons are just below that. Further below we see the **View of items list**.

Image 3

Purchase orders

Details

• Return Printable version

Help

Basic purchase order information

Buying company name IBM US General Procurement

Purchase order number 4600003024

Original purchase order date Sep/26/01 at 12:00 AM

Status Viewed , Accepted Help

Supplier

Supplier name AMP INC
Supplier number 1000066615

Payment information

Currency USD
Exchange rate 1,00000
Payment terms Net 30 days

View items list

The **View of items list** is on **Brief items view** by default. There are other views available. If you would like to change your default view, please select the preferred view and select **Set as preferred view**.

Views or presentations of the items:

- Brief Items View
- · Extensive Items View
- · Canada Tax Items View
- · EMEA Items View
- · PCD Items View

Please note the following screen capture is the bottom portion of the Purchase order details screen seen in the actual WOI application.

Image 4



Open item

The above image shows us the line items on a purchase order. To see the details for each one of the line items you will have to select the line numbers appearing in the column **Purchase order item number**.

Item details

On this screen you'd be able to view the **Ship to address, Tax description** and **Buying company contact**. The **Buying company contact** fields indicate the buyer's name and contact information. If you select the hyperlink **Purchase order item text**, it will show you all additional details that the buyer has entered for that line item on the Purchase order.

Purchase orders

Item detail

* Return

Purchase order item text.

Purchase order summary

Purchase order number 4600003024

Purchase order date Sep/26/01 at 12:00 AM Status Viewed, Accepted

Currency USD

 Purchase order item number
 00002

 Quantity ordered
 50

 Unit of measure
 EA

 Basis of unit price
 1.00

 Unit price
 20.00

 Extended price
 1,000.00

Brief description Randy WOI Testing 2
Tax description XX0000000, Not taxable

Requisition tracking number WOIXXX001W

Schedule of delivery				
Delivery date	Delivery time	Request quantity		
2001-07-31		50,00000		

Buyer information

Contact information Jean Prutisto
Phone 1-607-755-78

E-mail address randymay@us.ibm.com

Ship to address information

Name/Address IBM Corporation

Name2 Dept. 435 Inquiry Room Address1 1701 North Street Address2 ATTN Randy

Address3

РО Бох

City Endicott

District

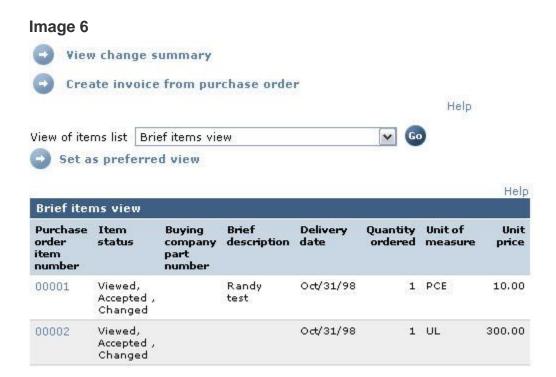
State/Region/Province

Postal code 13760

Country/Region United States(US)

Purchase order changes

This image shows a different purchase order that has been opened. We see a button that says **View change summary**. This button will appear if the buyer makes a change to a purchase order and sends it back. You can select this button to see the exact changes made to the Purchase Order.



Following is a list of changes made to a purchase order. Column one (1) shows the **Purchase order item number** to which the changes were made. Column two (2) gives the **Change date**. Column three (3) shows the **Field name** that was changed and the last two (2) columns show the **Value after change** and **Value before change**. Once you have viewed the changes choose '**Return**,' found at the bottom of the screen, to bring you back to the purchase order.

Image 7

Purchase orders Change summary * Return Basic purchase order information Buying company name Carrier CACD Purchase order number 4600001092 Purchase order date Sep/12/03 at 12:00 AM Last change date Sep/12/03 at 1:38 PM Search criteria View item All ~ Change date V Current Field name All Y Use search criteria to update list of changes. Help

Changes					
Purchase order item number	Change date	Field name 🔻	Value after change	Value before change	
00002 (Current)	Sep/12/03 at 1:38 PM	Requester Tracking Number	RANDY2	RANDY	
00002 (Current)	Sep/12/03 at 1:38 PM	Extended Price	300.00	100.00	
00002 (Current)	Sep/12/03 at 1:38 PM	Unit Price	300.00	100.00	

Accept or reject purchase order

This section explains how to accept/reject a purchase order. Once you ensure the information on the purchase order is correct, it must be accepted. The System will not allow you to create an invoice without accepting the purchase order. If the information is not correct, you need to have the buyer change the information. You may select the button I do not accept PO and it will reject the purchase order which may have a delay or if it is urgent, please call your buyer and request them to change the information. To accept the purchase order select, I accept PO.

Image 8



Acceptance confirmation screen

Once you accept the purchase order you will be taken to the 'Purchase Orders Confirm Acceptance' screen. You must select **OK** to confirm your acceptance of the purchase order.

Purchase order screen after accepting a PO

This example shows that both the line items have been accepted, and the button to **Create invoice from purchase order** is available after accepting a Purchase Order.

Image 9

