

PO Approval Enhancement

PO Type Display on Maintain Purchase Order Page

To continue improving the TeamWorks Financial user's experience, SAO has partnered with TGM to enhance the Maintain Purchase Order and Purchase Order Inquiry pages by displaying the PO Type code along with the full description to gain higher visibility during the purchase order review and approval process.

Where will I see the PO Type?

The PO Type with its full translate description is now located between the Doc Tol Status and Receipt Status. If the code is incorrect, the user can make the correction by navigating to the PO Header Details page where the PO Type currently exists. A change made on the PO Header Details will automatically update the Maintain Purchase Order page.

Navigation: **NavBar > Navigation > Purchasing > Purchase Orders > Add/Update POs**

PO Type Display on Main PO Page

The screenshot displays the 'Maintain Purchase Order' interface. At the top, it shows 'Business Unit 40700' and 'PO ID 0000000784'. The 'PO Status' is 'Pend Appr' and 'Budget Status' is 'Not Chk'd'. A 'Copy From' dropdown is visible. The 'Header' section contains fields for '*PO Date' (05/31/2018), '*Supplier' (INACTIVEVE-001), '*Supplier ID' (0000000000), and '*Buyer' (HHENDERSON). The 'Doc Tol Status' is 'Not Chk'd', and the 'PO Type' is 'OMP Open Market Purchase', which is highlighted with a red box. Other fields include 'Receipt Status' (Not Recvd), '*Dispatch Method' (Print), and 'PO Reference' (Online Src From Req 0000000451). A 'Dispatch' button and an 'Amount Summary' link are also present.

Figure 1 – PO Type with full translate description displays between DOC Tol Status and Receipt Status.

PO Header Details

PO Details

Supplier PAPERUSA-000

***PO Type** OMP Open Market Purchase

*Billing Location PO_000000 Billing Address

Origin 369 OFS

Use One Ship To

PO Date 02/26/2018

Budget Status Not Chk'd

Tax Exempt

ID 567XXXXXK

Letter of Credit ID

Ship To PO_369001

Currency

Currency Code USD Exchange Rate Detail

Base Currency USD

Rate Date 02/26/2018

Exchange Rate 1.00000000

Rate Type CRRNT

Process Control Option

Dispatch

Acknowledgements required for Not required

*Method Print

Accounting Date 01/26/2018

Accounting Template ACCTSPAY1

OK Cancel Refresh

Figure 2 – PO Header Details page allows for changes to be made to PO Type.

PO Header Details

PO Details

Supplier PRINTERINC-001

***PO Type** EXM Exempt-Per OCGA 50-5-

*Billing Location PO_000000 Billing Address

Origin 369 OFS

Use One Ship To

Figure 3 – Change made on the PO Header Detail

Maintain Purchase Order

Purchase Order

Business Unit 42700
 PO ID NEXT
 Copy From [dropdown]

PO Status Open
 Budget Status Not Chk'd
 Hold From Further Processing

▼ Header ?

*PO Date 08/14/2017 Supplier Search
 *Supplier PRINTERINC-001 Supplier Details
 *Supplier ID 000025XXXX PAPER USA INC
 *Buyer GINGROOT Ginger Root 404/555/0000

Doc Tol Status Valid
PO Type EXM Exempt-Per OCGA 50-5-
 Receipt Status Not Recvd
 *Dispatch Method Print [dropdown]

PO Reference [input]
 Amount Summary ?

Figure 4 – Main page is automatically updated with new code and description.

Purchase Order Inquiry Page

Navigation: **NavBar > Navigation > Purchasing > Purchase Orders > Review PO Information > Purchases**

Purchase Order Inquiry

Purchase Order

Business Unit 82000
 PO ID 0000050XXX
 Change Order 1

PO Status Dispatched
 Budget Status Valid

▼ Header

PO Date 08/14/2017
 Supplier Name PRINTERINC-001
 Supplier ID 000025XXXX Supplier Details
 Buyer Roger Rabbit 229/229-2292

Doc Tol Status Valid
PO Type EXM Exempt-Per OCGA 50-5-58
 Receipt Status Received
 Hold From Further Processing

PO Reference Banner Bug - Interdisciplinary
 Amount Summary

Figure 5 – Purchase Order Inquiry page displays the PO Type code and full description.