

# **Inquiry for Purchase Order, Receipts, and Invoices**

# Table of Contents

**iSupplier..... 1**  
**Inquiry For Purchase Order, Receipts, and Invoices ..... 1**

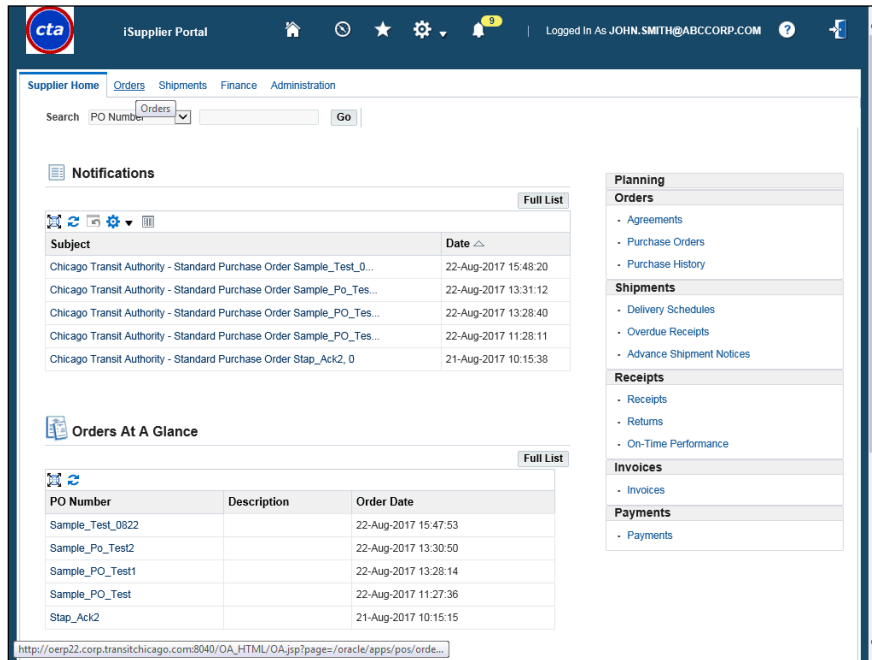
## iSupplier

### Inquiry for Purchase Orders, Receipts, and Invoices

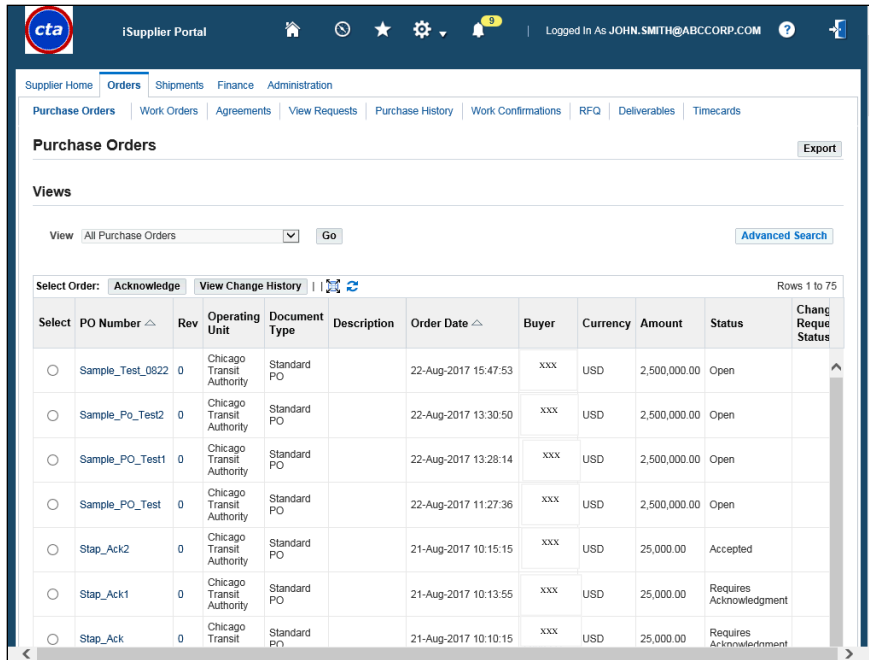
This document describes the Inquiry process for the following transactions.

- Purchase Orders – In the Advanced Search Screen, you can search by many different PO fields, including Buyer, Order Date, PO Number and other choices. In this document, the following searches are demonstrated.
  - Searching for All Purchase Orders
  - Searching by a specific Order Date
- Receipts – Again, Receipts can be searched for based upon various fields. In this document, searching by a portion of the purchase order number is demonstrated.
- Invoices – Several fields on the invoice can be used when searching for invoices. In this document, multiple invoice statuses will be demonstrated.

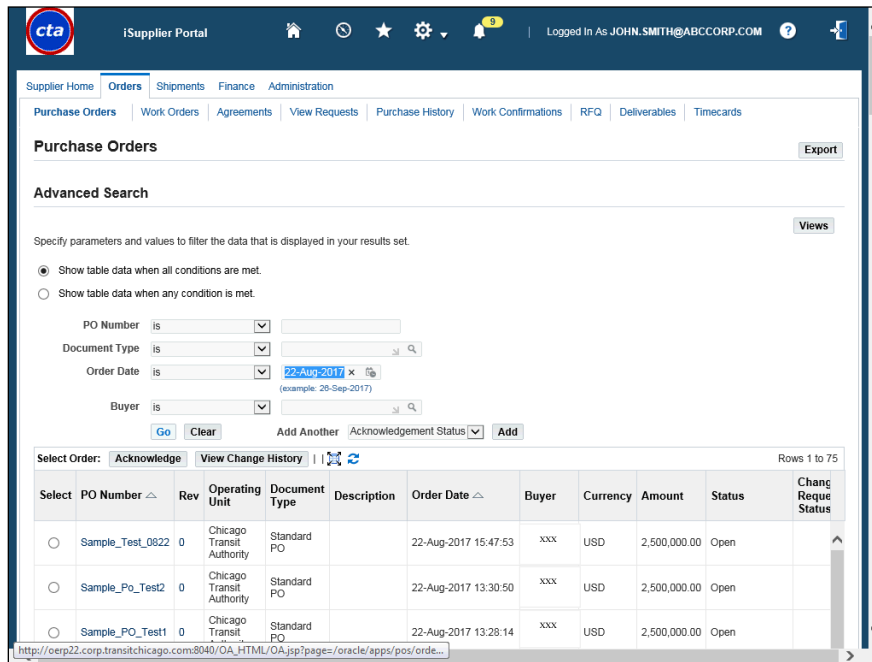
#### 1. Inquiry for Purchase Orders



Step	Action
1.	See screenshot above. From the Supplier Home Tab, click the <b>Orders</b> Link.  <a href="#">Orders</a>

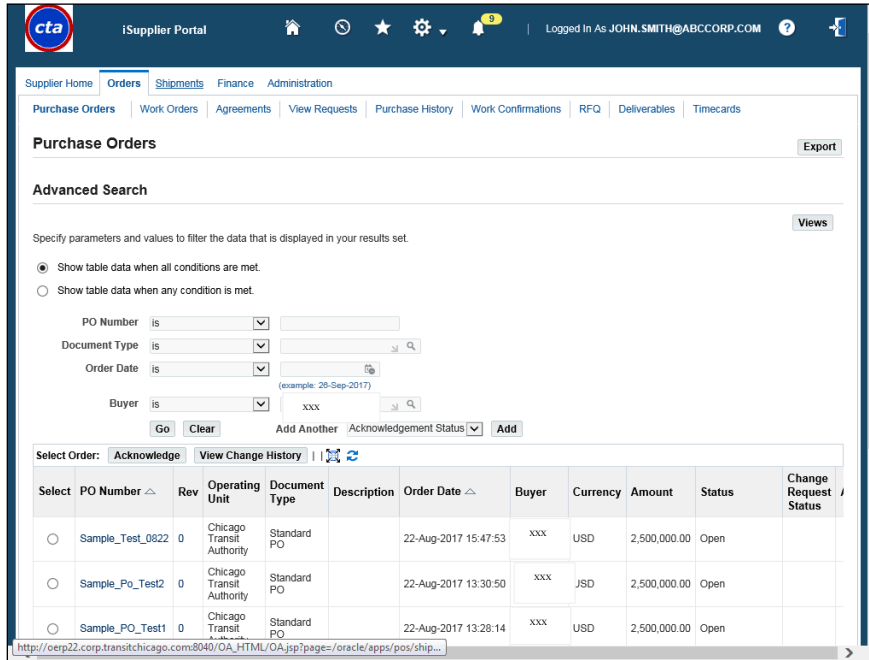


Step	Action
2.	See screenshot above. The Purchase Orders Tab will open. If needed, select All Purchase Orders from the View drop-down list. The list of all Purchase Orders will be retrieved. To narrow your search, click the <b>Advanced Search</b> button.



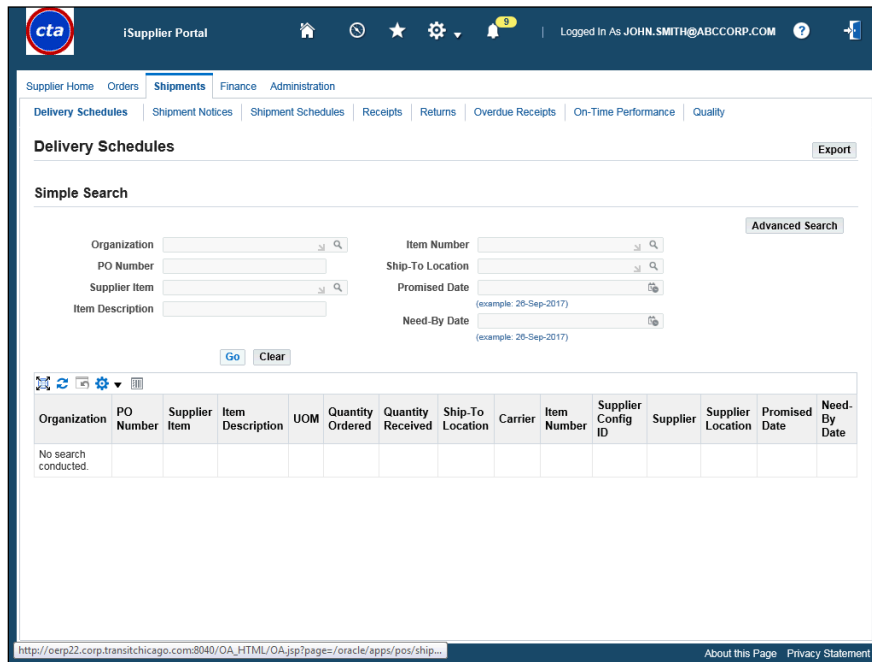
Step	Action
3.	See screenshot above. In this example, the search is narrowed by entering the Order Date of 22-Aug-2017. Only the orders with an Order Date of 22-Aug-2017 will appear on the screen. To execute the query, click the <b>Go</b> button.

- Inquiry of Shipment Receipts** – In this document searching with a portion of the purchase order number is demonstrated.

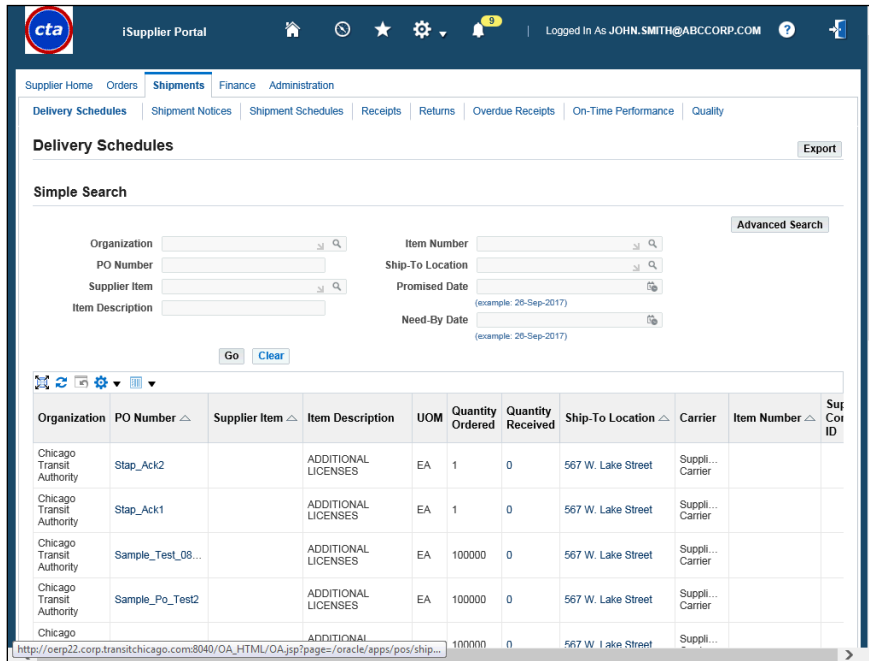


Step	Action
4.	See screenshot above. From the Supplier Home Tab, click the <b>Shipments</b> tab.

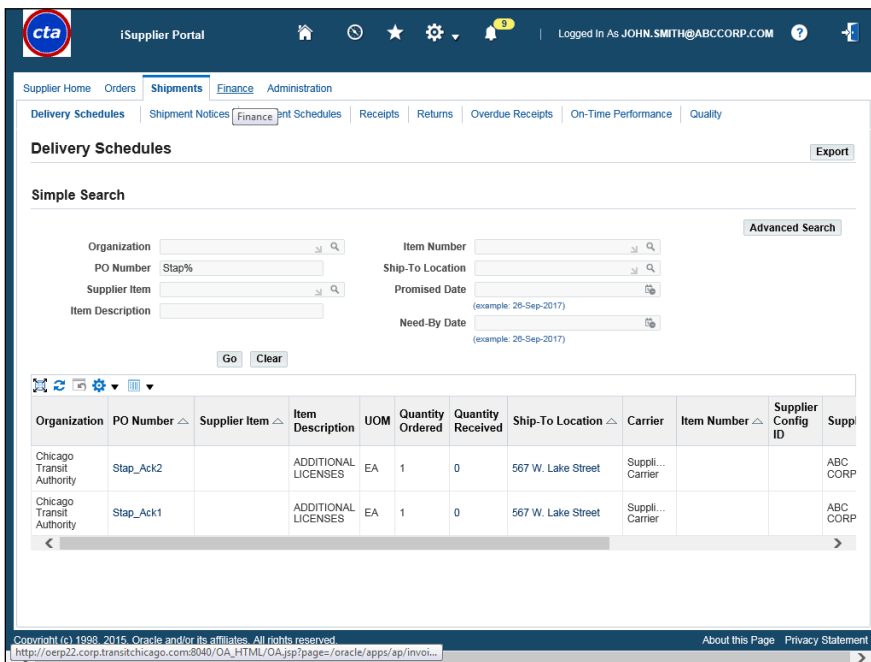
**Shipments**




Step	Action
5.	<p>See screenshot above.</p> <p>Once in the Shipments Screen, click the <b>Go</b> button to retrieve all shipments. You will be able to tell which items have been received in the system by CTA in the Quantity Received column.</p> <p><b>Go</b></p>



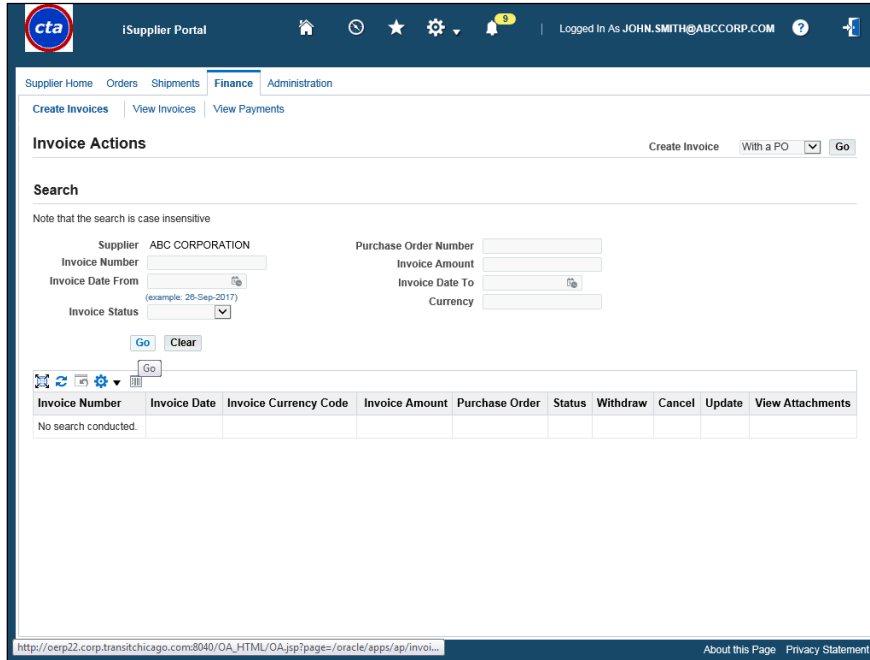
Step	Action
6.	See screenshot above. To narrow the search with criteria, click the <b>Clear</b> button.





Step	Action
7.	<p>See screenshot above. To search by a portion of the purchase order number, enter the portion of the purchase order number you would like to search for. In the above example, Stap% was entered. The % is a wildcard. Therefore, any transaction with a PO # with Stap at the beginning of the PO number will be retrieved in the search.</p> <p>Click the <b>Go</b> button. Only Shipment Receipts where the PO Number starts with 'Stap' are retrieved.</p> <p></p>

- Inquiry of Invoices/Payments** – In this exercise we will search for all invoices, invoices with a status of Validated, and invoices with a status of In Process. These are just a few of the searches that can be executed.



Step	Action
8.	<p>See screenshot above.</p> <p>From the Supplier Home, click on the Finance Tab.</p> <p><b>Finance</b></p>

**Invoice Actions** Create Invoice With a PO  **Go**

**Search**  
Note that the search is case insensitive

Supplier: ABC CORPORATION  
 Invoice Number:   
 Invoice Date From:  (example: 28-Sep-2017)  
 Invoice Status: In Process

Purchase Order Number:   
 Invoice Amount:   
 Invoice Date To:   
 Currency:

**Go** **Clear**

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
test save	23-Aug-2017	USD	1,000.00		In Process		--		
test g	23-Aug-2017	USD	15,100.00	Sample_PO_Test1	In Process		--		
test f	23-Aug-2017	USD	2,500,100.00	Sample_PO_Test2	In Process		--		
TEST E	23-Aug-2017	USD	12,500.00	Sample_Test_08...	In Process		--		
test d	23-Aug-2017	USD	5,000.00		In Process		--		
Test_notification	23-Aug-2017	USD	1,000.00		In Process		--		
test c	23-Aug-2017	USD	5,000.00		In Process		--		

Step	Action
9.	See screenshot above Click the <b>Go</b> button. All invoices will be retrieved. 

**Invoice Actions** Create Invoice With a PO  **Go**

**Search**  
Note that the search is case insensitive

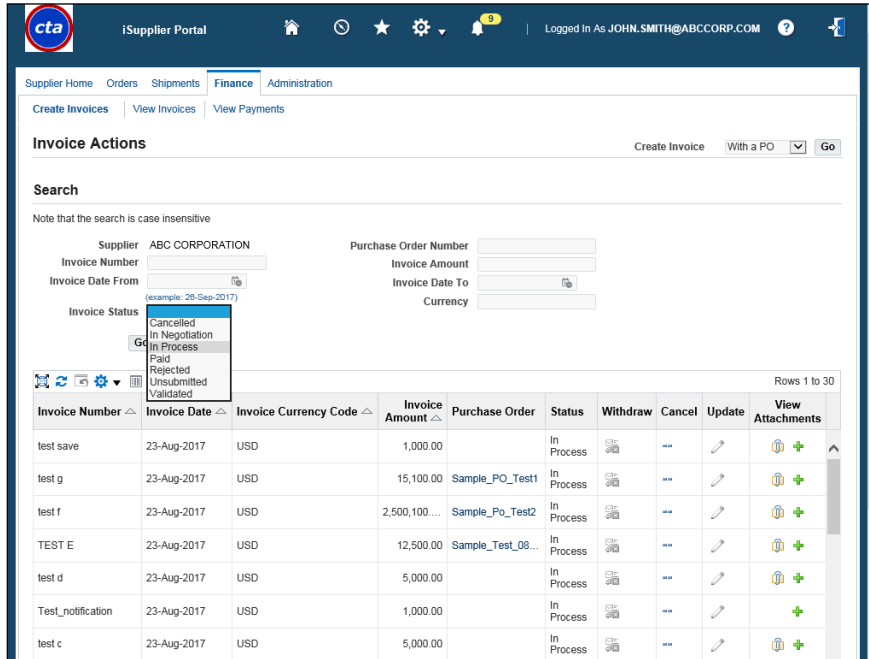
Supplier: ABC CORPORATION  
 Invoice Number:   
 Invoice Date From:  (example: 28-Sep-2017)  
 Invoice Status: Validated

Purchase Order Number:   
 Invoice Amount:   
 Invoice Date To:   
 Currency:

**Go** **Clear**

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
AME INV PO 09	18-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
AME INV PO 02	14-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
AME Test PO LT50k	14-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
Test INV PO Ord 02	14-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
AME INV PO	13-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
AME INV PO 05	13-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		
AME INV PO TEST 03	14-Sep-2017	USD	25.00	Sample_PO_Te...	Validat...		--		

Step	Action
10.	<p>See screenshot above</p> <p>To search for a particular status, click the <b>Clear</b> button, then click in the <b>Invoice Status</b> field. In the above search, the status of Validated is selected. Therefore, all invoices with a status of Validated are retrieved.</p> <p>Invoice Status <input type="text" value="Validated"/> ▼</p>



Step	Action
11.	<p>See screenshot above.</p> <p>To change the search, click on the <b>Clear</b> button, then click in the <b>Invoice Status</b> field and choose the <b>In Process</b> value from the list of values. All invoices with the status of 'In Process' are retrieved.</p> <p>In Process</p>

Step	Action
12.	<p>Searches can be performed on each field in the top section of the screen. You can experiment running searches with each of the fields in the available search criteria.</p> <p><b>End of Procedure.</b></p>