



MANAGE PURCHASE ORDERS (SOURCED FROM ORACLE REQUISITIONS)

PO

QUICK REFERENCE GUIDE PO-03

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Manage Purchase Orders in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to manage Purchase Orders and check the details for a specific Purchase Order (PO).



User Tip:

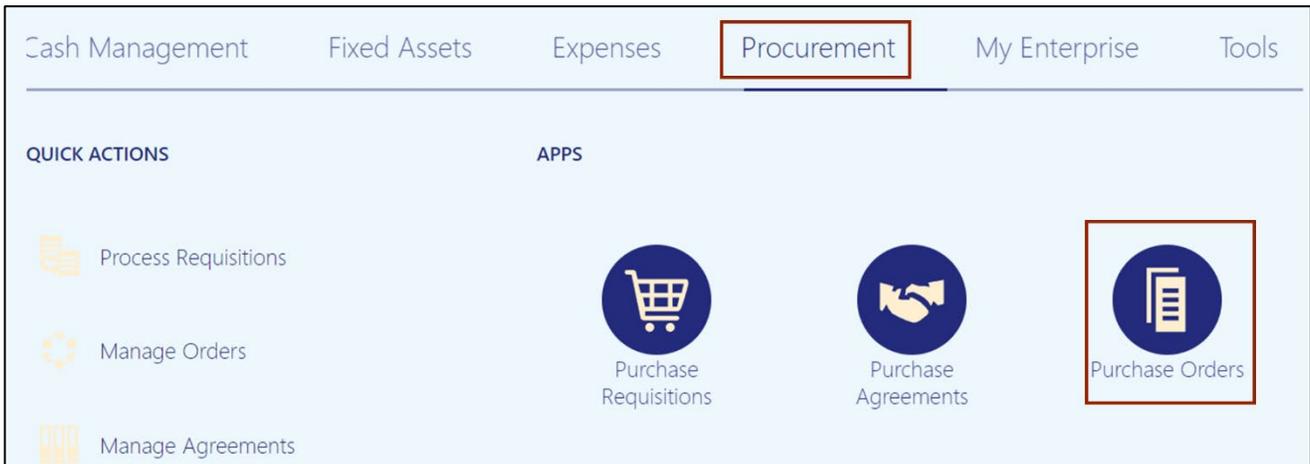
The following are prerequisites to Manage Purchase Orders in NCFS:

1. All NCFS Purchase Orders must be sourced from approved NCFS requisitions.
2. All Ariba POs will be interfaced in real time from Ariba into NCFS, and these cannot be modified directly in NCFS. Instead, all modifications must be initiated directly from Ariba.

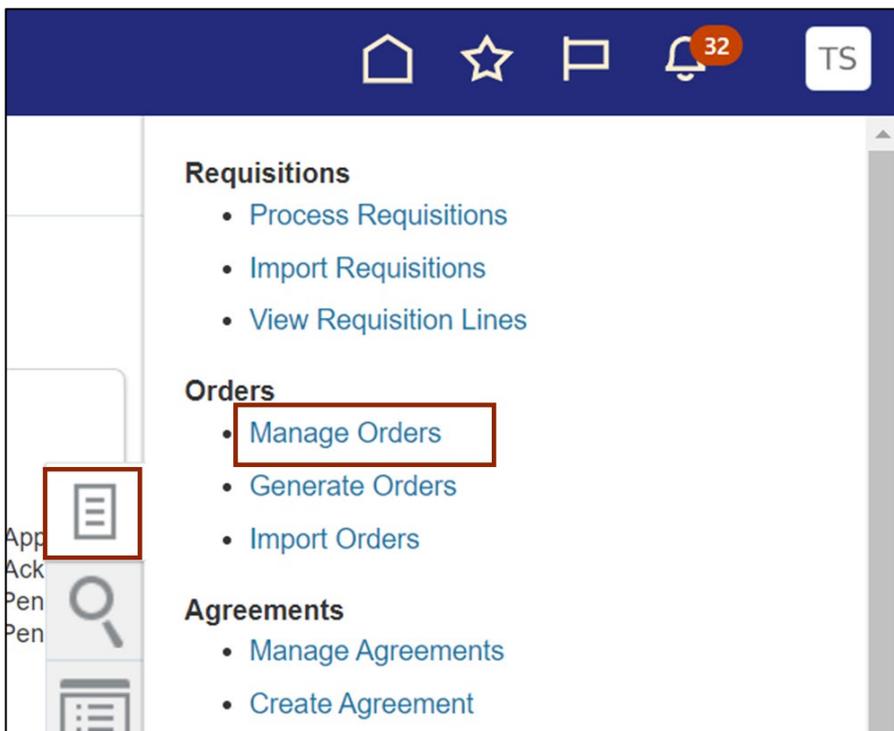
Manage Purchase Orders

To Manage Purchase Orders in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **Procurement** tab. Click the **Purchase Orders** app.



3. Click the **Tasks** [] icon. Under Orders, click **Manage Orders**.



- The **Manage Orders** page opens. Under the **Search** section, enter the required fields.

In this example, we choose **Procurement BU as 0200 Administrative Office of the Courts**, ****Order as 02P%** and **Include Closed Documents as Yes**. Click the **Search** button.

Note: Delete any auto-populated details in the **Buyer** field.

Manage Orders ? Done

Headers Schedules

Search Advanced Manage Watchlist Saved Search All My Orders ▼

** At least one is required

** Keywords ** Order 02P%

Procurement BU 0200 ADMINISTRATIVE OFFICE OF THE COURTS ▼ ** Requisition

** Supplier 🔍 Status ▼

** Buyer ▼ Include Closed Documents Yes ▼

Search Reset Save...

- The **Manage Orders Search Results** page opens. In the **Search Results** section, click the **Purchase Order**.

Manage Orders ?

Headers Schedules

Search

Search Results

Actions ▼ View ▼ Format ▼ ✎ 📄 📄 📄 Freeze 📄 Detach ↶ Wrap

Order	Description
02P0000015	
02P0000014	
02P0000013	
02P0000012	
02P0000011	
02P0000010	
02P0000009	

- The **Purchase Orders** page opens. On the **General** section, check the **PO Status, Funds Status, Buyer, Total Amount, Description, Requisition, Supplier Name, and Supplier Site** fields.

Note: To view the PO in PDF version, click the **View PDF** button.

Overview Manage Orders x Purchase Order: 02P0000015 x

Purchase Order: 02P0000015 ? ★ View PDF Actions Refresh Done

Main

General

Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Supplier	INTERNATIONAL BUSINESS MACHINE CORPORATION	Ordered	250,000.00 USD
Requisitioning BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Supplier Site	O.02PT.01	Total Tax	0.00 USD
Sold-to Legal Entity	NC ADMINISTRATIVE OFFICE OF THE COURTS	Supplier Contact	afnziabmxd y aarkhaasz	Total	250,000.00 USD
Bill-to BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Communication Method	None	Description	
Order	02P0000015	Bill-to Location	0200AOCNI-PO BOX 2448	Requisition	02R0000020
Status	Open ⓘ	Ship-to Location	0200AOCNI-PO BOX 2448	Source Agreement Supplier Order	
Funds Status	Reserved				
Buyer	TRAYWICK SIMPSON				
Creation Date	5/16/23				

- Scroll down and validate the **Lines** section information. Check the **Quantity, UOM,** and **Price** fields.

Lines Schedules Distributions

Actions View Format Freeze Detach Wrap

Line	Item	Description	Quantity	UOM	Price	Ordered	St
1		Test req 0200	250,000	Dollar	1.00	250,000.00	Op

Columns Hidden 45

8. Validate the **Schedules** section information. Check the **Organization** field.

Line	Description	Location	Requested Delivery Date	Promised Delivery Date	Quantity	UOM Name	Status	Funds Status	Life Cycle	Details	Organization
1	Test req 0200	0200AOCN...	5/19/23		250,000	Dollar	Open	Reserved			0200AOCNI

9. Validate the **Distributions** section information. Check the **Charge Account** and **Budget Date** field/

Line	Description	Deliver-to Location	Quantity	UOM Name	Ordered	PO Charge Account	Budget Date	Fu
1	Test req 0200	0200AOCN...	250,000	Dollar	250,000.00	0200-022001-52120001-0000000-00000000-0	5/12/23	Res

Note: If there are changes identified and required after validation of the information on the Purchase order page, please follow the steps from step 10- 15. If there are no changes required in the PO, please skip to step 15.

10. From the **Actions** drop-down choice list, select **Edit**.

Purchase Order: 02P0000015

Actions: Edit, Delete, Acknowledge, Communicate, Cancel Document, Close, Reopen, Hold, Freeze, Withdraw

Field	Value
Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS
Requisitioning BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS
Sold-to Legal Entity	NC ADMINISTRATIVE OFFICE OF THE COURTS
Bill-to BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS
Order	02P0000015
Status	Open
Supplier	INTERNATIONAL BUSINESS MACHINE CORPORATION
Supplier Site	O.02PT.01
Supplier Contact	afnziabmxd y aarkhaasz
Communication Method	None
Bill-to Location	0200AOCNI-PO BOX 2448
Ship-to Location	0200AOCNI-PO BOX 2448

11. Make the required edit in the Purchase Order.

In this example we choose, to update **Quantity - 25,000** in the **Lines** section.

* Line	* Type	Edit	Item	* Description	* Category Name	Quantity	UOM	* Price	Order
1	Rate Based Ser			Test Req 0200	801015-Business an	25,000	Dollar	1.00	25,000

Columns Hidden 23

12. Click the **Plus [+]** icon to add a new line to the Purchase Order.

* Line	* Type	Edit	Item	* Description	* Category Name	Quantity	UOM	* Price	Order
1	Rate Based Ser			Test Req 0200	801015-Business an	25,000	Dollar	1.00	25,000

Columns Hidden 23

13. Enter the applicable details in the new line of the Purchase Order.

* Line	* Type	Edit	Item	* Description	* Category Name	Quantity	UOM	* Price	Order
2	Fixed P			Test	801015-Busii			1.00	1.00
1	Rate Based Ser			Test Req 0200	801015-Business an	25,000	Dollar	1.00	25,000.00

Columns Hidden 23

14. Enter the value in *Description field.

Overview Manage Orders x Purchase Order: 02P0000015 x Edit Document (Purchase Order): 02P0000015 x

Edit Change Order: 1 ?

Change Order	1	Status	Incomplete
* Description	Changes to PO	Amount Changed	-225,000.00 USD
Creation Date	5/23/23	Funds Status	Not Applicable

Main

General ?

Procurement BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Supplier	INTERNATIONAL BUSINESS MACHINE CORPORATION
Requisitioning BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	* Supplier Site	O.02PT.01
Sold-to Legal Entity	NC ADMINISTRATIVE OFFICE OF THE COURTS	Supplier Contact	aarkhaaszn, afnziabmxd
Bill-to BU	0200 ADMINISTRATIVE OFFICE OF THE COURTS	Communication Method	None
Order	02P0000015		

15. Click the Submit button.

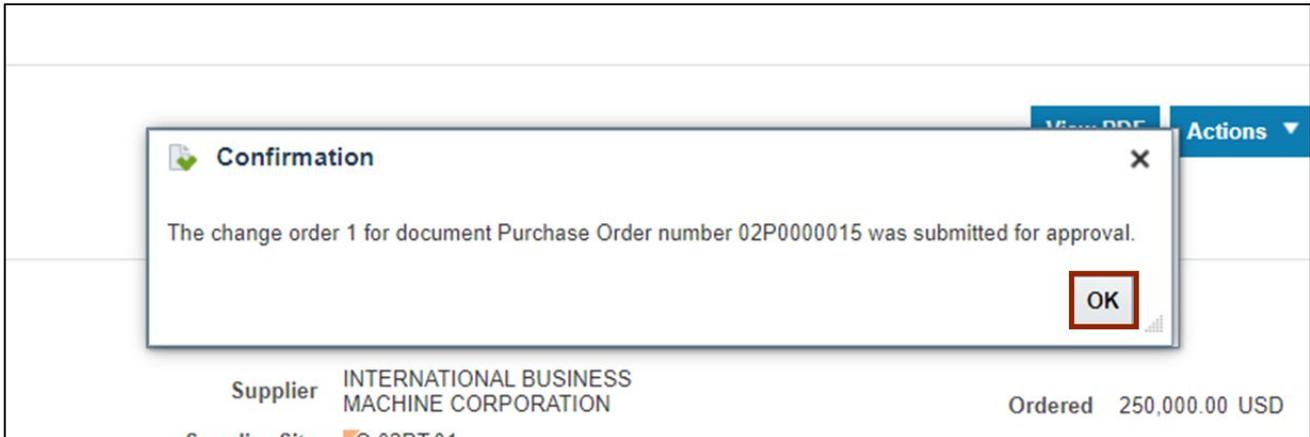
Home Star Flag 24 TS

Check Funds Manage Approvals Actions Save Submit Cancel

Initiating Party Buyer
Initiator TRAYWICK SIMPSON
Type Internal

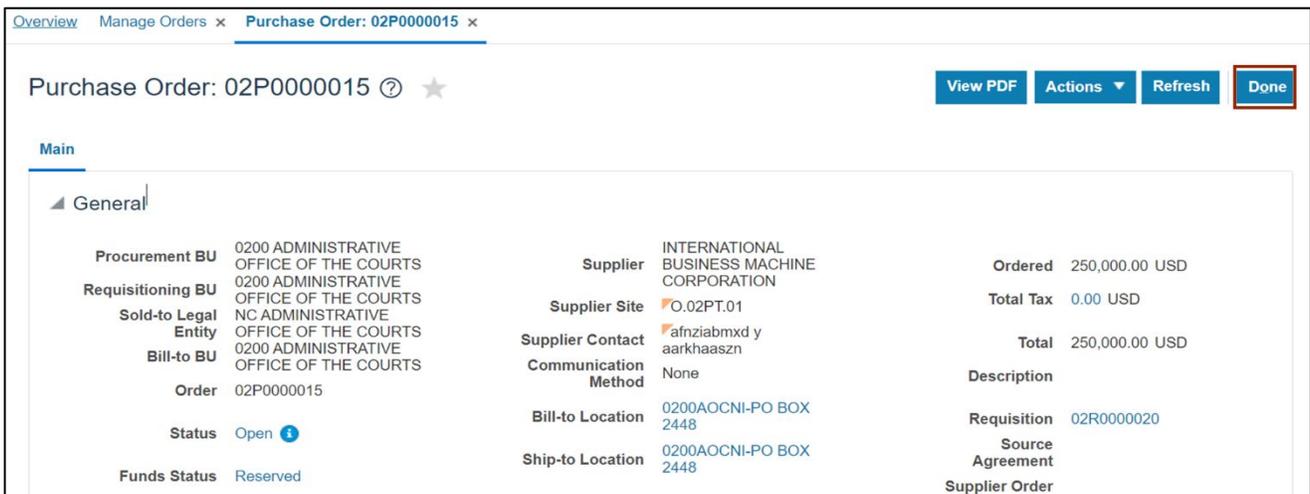
Menu Search List Bar

- The *Confirmation* pop-up appears, the changes done to PO are submitted for approval. Click the **OK** button.



- Click the **Done** button.

Note: Change Order has been submitted for approval, and once reviewed and approved, it will be completed and the PO will be updated as needed.



18. You are now redirected to **Manage Orders** page. You can see the submitted PO in the **Order** field and it's status under the **Status** field.

Overview **Manage Orders** x

Manage Orders ? Done

Headers Schedules

Search Advanced Manage Watchlist Saved Search All My Orders

Search Results

Actions View Format + [Icons] Freeze Detach Wrap

Order	Description	Supplier	Ordered	Currency	Status	Life Cycle	Change Order	Creation Date
02P0000015		INTERNATION...	250,000.00	USD	Open	🔄	1	5/16/23
02P0000014		INTERNATION...	250,000.00	USD	Open	🔄		5/16/23
02P0000013		INTERNATION...	250,000.00	USD	Open	🔄		5/10/23
02P0000012		INTERNATION...	250,000.00	USD	Open	🔄		5/9/23

Wrap-Up

Manage Purchase Orders using the steps above.

Additional Resources

Virtual Instructor-Led Training (vILT)

- PO102: PO Buyer