



Purchase Order 100

Prerequisites, Overview and Module Objectives

Prerequisites

Prior to starting this training, we recommend that you complete the following modules:

- Navigation for Shoppers (Registered Users)
- Personalizing
- Searching for Shoppers (Registered Users)
- Shopping

These modules will provide some valuable tools and helpful suggestions to assist you in learning about the GoCM Purchase Order.

If you would like to take these modules before starting **Purchase Orders**, please click on the **All Modules** link in the left navigation bar.

Module Overview

This module is designed to teach you the purchase order process of GoCM. The numerical menu bar above this text indicates which section of the module you are in.

1. Prerequisite, Overview and Course Objectives
2. Step-by-Step process with screen shots and demonstrations
3. Review and Try it Now
4. Helpful Tips and other Job Aids

While you can skip menu items, we recommend that you follow the natural progression of the course as it will help you better understand how to work in the GoCM.

Objectives of this Module

The GoCM Purchase Order is designed to assist you in creating a purchase order for distribution to suppliers from whom you will be purchasing items.

A demonstration is incorporated in this module to show you how to view and change a purchase order.

The objectives of this course are to allow users to:

- Search for a Purchase Order
- Display a Purchase Order
- Make changes to a Purchase Order
- Preview, Print, and Save a Purchase Order

Additional purchase order tips are provided in the Helpful Tips and other Job Aids section of this module. This includes information on:

- Downloading a Purchase Order
-

Step-by-Step Process with Screen Shots and Demonstrations

The following scenario will be used throughout this module to help you learn how to use the GoCM purchase order:

- You have created a shopping cart with two items: ECO conv - 2004 8.1L Chev Suburban/GMC and a monitor. Now proceed to creating and viewing your purchase order. Note: Because both items are part of separate Standing Offers, two Purchase Orders should be created.

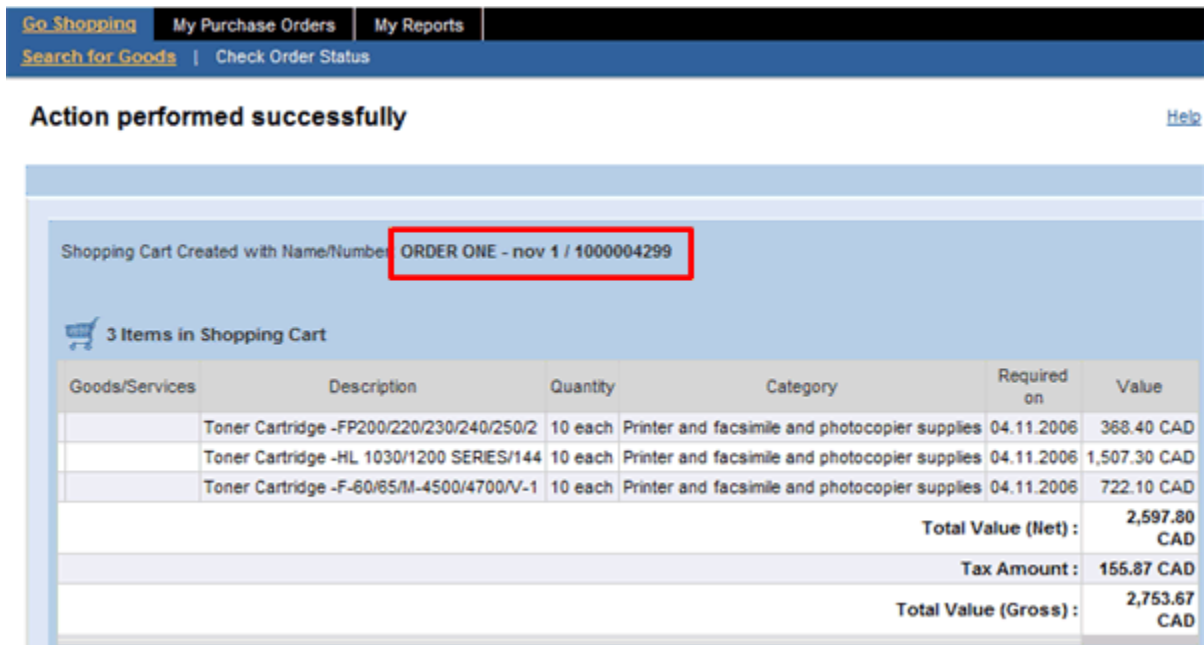
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Searching the GoCM for a Purchase Order

Once you have ordered your shopping cart, one or more purchase orders are automatically created.

You will need to remember the shopping cart name and number in order to retrieve your purchase order. The cart number is automatically generated by the system.




Go Shopping My Purchase Orders My Reports

Search for Goods | Check Order Status

Action performed successfully [Help](#)

Shopping Cart Created with Name/Number: **ORDER ONE - nov 1 / 1000004299**

 3 Items in Shopping Cart

Goods/Services	Description	Quantity	Category	Required on	Value
	Toner Cartridge -FP200/220/230/240/250/2	10 each	Printer and facsimile and photocopier supplies	04.11.2006	368.40 CAD
	Toner Cartridge -HL 1030/1200 SERIES/144	10 each	Printer and facsimile and photocopier supplies	04.11.2006	1,507.30 CAD
	Toner Cartridge -F-60/65/M-4500/4700/V-1	10 each	Printer and facsimile and photocopier supplies	04.11.2006	722.10 CAD
Total Value (Net) :					2,597.80 CAD
Tax Amount :					155.87 CAD
Total Value (Gross) :					2,753.67 CAD

Go to the **My Purchase Orders** tab and click on **Process Purchase Order** to retrieve your purchase order.

Note: GoCM is not connected with your department/agency's back end procurement tool. You will need to ensure that you have entered the information you need to in your procurement tool as well.

There are two ways of searching for purchase orders. The simple search allows searching based on Purchase Order Number, Purchase Order Name, Status and/or Timeframe as to when the purchase order was created. The image below demonstrates a simple search.







The screenshot shows the 'Process Purchase Orders' page. At the top, there are navigation tabs: 'Go Shopping', 'My Purchase Orders', and 'My Reports'. Below these is a sub-header 'Process Purchase Orders'. The main heading is 'Purchase Order' with a 'Help' link. There is a 'Create PO' section with a dropdown for 'Purchase Order with Transaction Type' and a 'Create' button. Below that are 'Worklist' and 'Find' buttons. The search section is titled 'Search for Purchase Order' and contains four input fields: 'Purchase Order Number', 'Purchase Order Name', 'Status', and 'Timeframe'. The 'Purchase Order Number' field has a search icon (magnifying glass) to its right. Below the search fields are 'Start' and 'Extended Search' buttons.

Enter your search criteria then click **Start**.

Note: You must click on the **Start** button. Pressing **Enter** on your keyboard will not work.

If you get a list of purchase orders, click on the purchase order number or Details icon (magnifying glass) to display the purchase order information.

The screenshot shows the 'Process Purchase Orders' page with search results. The search criteria are: 'Purchase Order Name' is 'Ordered' and 'Status' is 'Ordered'. Below the search fields are 'Start' and 'Extended Search' buttons. The search results are displayed in a table with the following columns: Number, Name, Purch. Organization, Purch. Group, Total Val, Status, and Action. The first row is highlighted.

Number	Name	Purch. Organization	Purch. Group	Total Val	Status	Action
4000000013	ECSHOP002 13.09.2006 10:24	GoCM Purchasing Organization	PWGSC Purchasing Group	31.40 CAD	Ordered	 
4000000157	tc-1 jcarter 28-sep toner and monitor	GoCM Purchasing Organization	PWGSC Purchasing Group	31,232.00 CAD	Ordered	 
4000000062	Explore - JCarter 20-sep Class 3	GoCM Purchasing Organization	PWGSC Purchasing Group	0.00 CAD	Ordered	 

You can also click on the **Change** icon to modify the purchase order information. This will be discussed a little later in the module.

If you only get one result from your search (e.g. if you search based on purchase order number), the result list will display the purchase order along with all purchase order line items as illustrated below.

Go Shopping **My Purchase Orders** My Reports
 Process Purchase Orders

Purchase Order [Help](#)

Create PO

Purchase Order with Transaction Type:

Search for Purchase Order

Purchase Order Number: Purchase Order Name: Status: Timeframe:

[Extended Search](#)

Search Result: 1 Purchase Order

Number	Name	Purch. Organization	Purch. Group	Total Val.	Status	Action
4000000663	ORDER ONE - nov 1	GoCM Purchasing Organization	PWGSC Purchasing Group	2,597.80 CAD	Ordered	

Item	Description	Product	Category	Quantity	Net Price	Contract	Action
1	Toner Cartridge -FP200/220/230/240/250/2	44103100	Printer and facsimile and photocopier supplies	10 each	36.84 CAD Per 1 each		
2	Toner Cartridge -HL 1030/1200 SERIES/144	44103100	Printer and facsimile and photocopier supplies	10 each	150.73 CAD Per 1 each		
3	Toner Cartridge -F-80/85/M-4500/4700/V-1	44103100	Printer and facsimile and photocopier supplies	10 each	72.21 CAD Per 1 each		

Similar to viewing specific information about the purchase order, you can click on the item number or Details icon on the purchase order item line to go directly to the purchase order line item information.

You can also click on the Change icon on the on the purchase order item line to modify the purchase order line item information. This will be discussed a little later in the module.

The other way to search for a Purchase Order is by extended search. The extended search provides the capability to search on various other purchase order data elements.

Note: Both search methods will limit the purchase order search result list to your own purchase orders, only administrators can view/modify purchase orders that belong to others within the department.

To search using the extended search, click on the **Extended Search** hyperlink next to the **Start** button as seen below.

Go Shopping **My Purchase Orders** My Reports
 Process Purchase Orders

Purchase Order [Help](#)

Create PO

Purchase Order with Transaction Type:

Search for Purchase Order

Purchase Order Number: Purchase Order Name: Status: Timeframe:

The search screen will open up many different fields to help you refine your search.

Go Shopping **My Purchase Orders** My Reports

Process Purchase Orders

Purchase Order [Help](#)

Create PO

Purchase Order with Transaction Type:

Search for Purchase Order

Purchase Order Number <input type="text"/>	Purchase Order Name <input type="text"/>	Status <input type="text"/>	Timeframe <input type="text"/>
Purchasing Organization <input type="text"/>	Purchasing Group <input type="text"/>	Vendor <input type="text"/>	Requester <input type="text"/>
Goods Recipient <input type="text"/>	Preferred Vendor <input type="text"/>	Item Description <input type="text"/>	Product <input type="text"/>
Vendor Product Number <input type="text"/>	Product Category <input type="text"/>	Account Assignment Cat. <input type="text"/>	Account Assign <input type="text"/>
Contract Number <input type="text"/>	Delivery Date: From <input type="text"/>	Delivery Date: To <input type="text"/>	Requirement Nu <input type="text"/>

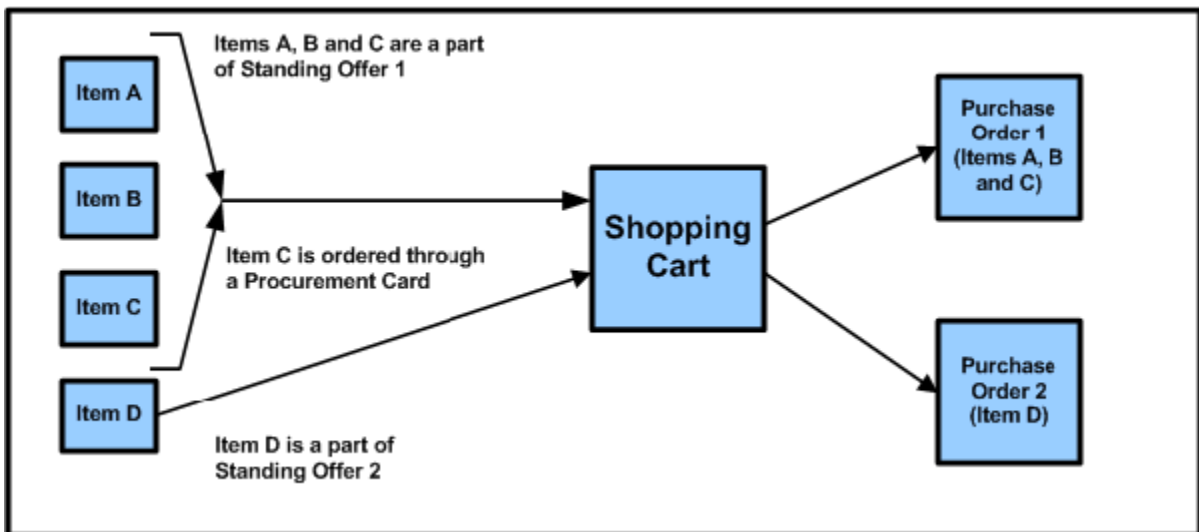
Enter your search criteria and click on **Start**. You may have to scroll to the bottom of the screen to locate the **Start** button.

You may have to scroll down to view your search results.

Displaying your Purchase Order

Once you have found the purchase order you were looking for, click on the purchase order number or details icon to display your purchase order.


Note: As the graphic below demonstrates, separate purchase orders will be automatically created for items under different standing offer agreements. They will still remain part of the same shopping cart. However, your print output will display the number of different standing offers which your shopping cart contains.



As you can see in the graphic below, you can view your purchase order by **Header Data** or **Item Data**.

Header data provides details about the entire purchase order. Item data provides details about each line item within the purchase order.

The screenshot shows a web application interface for displaying purchase order details. At the top, there is a navigation bar with tabs for "Go Shopping", "My Purchase Orders", and "My Reports". Below this is a sub-header "Process Purchase Orders". The main heading is "Display Purchase Order". There are several action buttons: "Order", "Hold", "Check", "Change", "Display", "Delete", "Complete", "Refresh", "Back to Initial Screen", "Output Preview", "Download", and "Upload". A summary bar shows "Purchase Order Name ORDER ONE - nov 1" and "Number 4000000663". Below this are two tabs: "Header Data" (highlighted with a red box) and "Item Data" (also highlighted with a red box). Under "Header Data", there are sub-tabs: "Basic Data" (highlighted with a yellow box), "Documents", "Payment", "Output", "Status", "Document History", "Approval", and "Versions". The "Basic Data" tab displays a table of purchase order details:

Document Date	01.11.2006
Total Value	2,597.80 Canadian Dollar
Tax Value	155.87 Canadian Dollar
Transaction Type	ECPO Purchase Order
Purchasing Organization	GoCM Purchasing Organization
Purchasing Group	PWGSC Purchasing Group 
Amendment Number	
Amendment Amount	0.00
Backend PO Number	


Displaying your Header Data

In the **Basic Data** tab, you can view all of the following information:
















1. The administrator responsible for the purchasing group/department;
2. Vendor contact information;
3. Requestor and/or Goods Recipient contact information; and
4. Ship-To Address details.

Header Data | Item Data

Basic Data | Documents | Payment | Output | Status | Document History | Approval | Versions

Document Date	01.11.2006
Total Value	2,597.80 Canadian Dollar
Tax Value	155.87 Canadian Dollar
Transaction Type	ECPO Purchase Order
Purchasing Organization	GoCM Purchasing Organization
Purchasing Group	PWGSC Purchasing Group 
Amendment Number	
Amendment Amount	0.00
Backend PO Number	

Partner Overview

Function	Number	Name	Action
Vendor	53	KERR NORTON	   
Requester	33	Tim ECSHOP002	   
Goods Recipient	33	Tim ECSHOP002	   
Ship-To Address	5	0127	   

To view the departmental administrator, click on the display icon next to the **Purchasing Group** field. You can also view other details about Vendor, Requester, Goods Recipient, Ship-To Address and Invoicing Address by clicking the magnifying glass to the right of the Function. This is shown in above graphic.

If there is an e-mail address maintained with the master data, you will notice that the mail icon is enabled. Click on the e-mail icon to launch your email software and send an email to the recipient.

If you have made changes to your purchase order, you can view the changes by clicking on the **Display Change Documents** button at the bottom of the screen, as seen in the graphic below. You may need to scroll down to view the button.

Header Data | Item Data

Basic Data | Documents | Payment | Output | Status | Document History | Approval | Versions


Document Date: 01.11.2006

Total Value: 2,597.80 Canadian Dollar

Tax Value: 155.87 Canadian Dollar

Transaction Type: ECPO Purchase Order

Purchasing Organization: GoCM Purchasing Organization

















Purchasing Group: PWGSC Purchasing Group 

Amendment Number:

Amendment Amount: 0.00

Backend PO Number:

Partner Overview

Function	Number	Name	Action
Vendor	53	KERR NORTON	   
Requester	33	Tim ESHOP002	   
Goods Recipient	33	Tim ESHOP002	   
Ship-To Address	5 0127		   

Changed By: WF-BATCH

Changed on: 01.11.2006 [Display Change Documents](#)

The graphic below is the result of clicking **Display Change Documents**.

[Back to Purchase Order](#)

SAP

[Help](#)

ORDER ONE - nov 1

Changed Since: Changed by: Changes Within Version: Item Number:

Sorted By:

[Header Data ORDER ONE - nov 1](#)

Status							
Description	Old Value	New Value	Changed By	Changed on	Changed At	Version	
Awaiting Approval Indicator: Status Is Inactive		X	WF-BATCH	01.11.2006	11:21:13	2	
Ordered Newly Added			WF-BATCH	01.11.2006	11:21:13	2	

In **Documents** under the **Header Data** tab, you view text that was manually entered on the purchase order. To see text entered with the shopping cart, you must go to **Documents** under the **Item Data** tab.

Header Data | Item Data

Basic Data | Documents | Payment | Output | Status | Document History | Approval | Versions

Texts

To Display / Edit the Texts, Choose the Appropriate Text Type

Text Overview

Text Type	Text Preview (60 Chars.)
Vendor Text	Vendor Text was entered manually.
Internal Note	Internal Note was entered manually.
Approval Note	Approval Note was entered manually.
Comments from Vendor	

Vendor Text

Vendor Text was entered manually.

Attachments

Upload a Document:

Description

Path

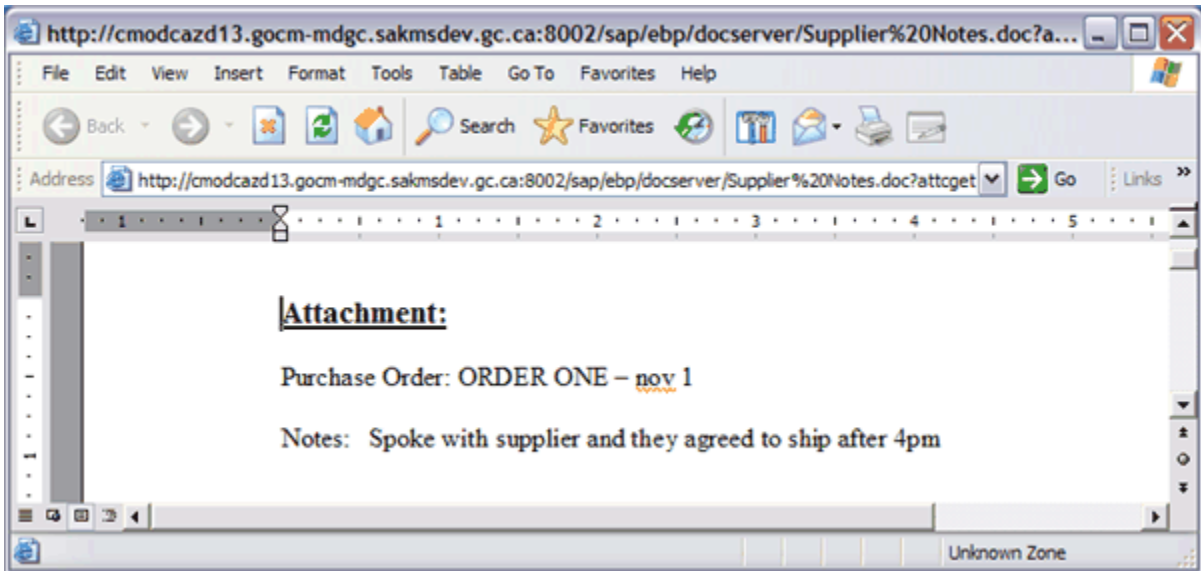
Overview of Attachments

	Description	Category	Version	Processor	Typ	File Size (Kb)	Inter.	Changed By	Changed on
<input type="radio"/>	Supplier Notes	Standard Attachment	1		doc	67	<input type="checkbox"/>	ECSHOP002	22.05.2007 14:05:09

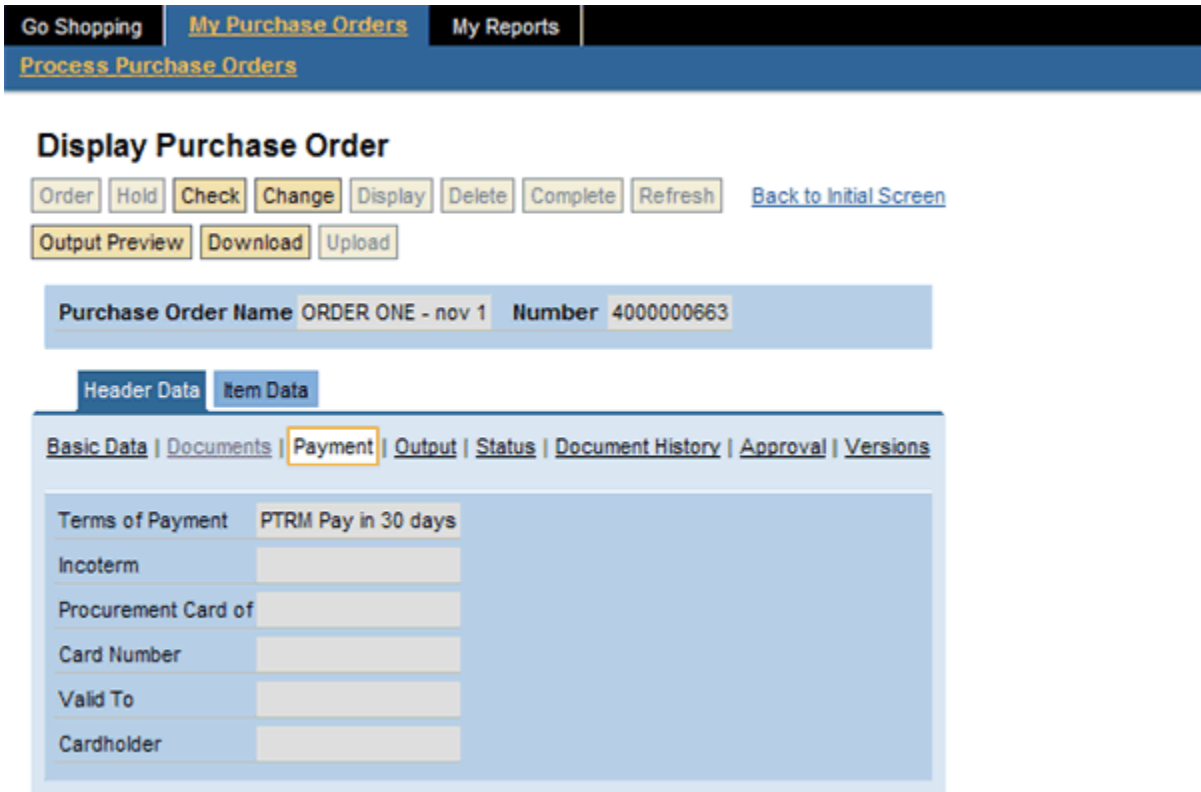
Note: Since the text from the shopping cart does not appear with the header information on the purchase order, this tab does not normally contain any information.

Note: When approval workflows are used, this text will contain comments from the approver. Since GoCM does not use approval workflows, this text would normally be blank (unless text was added manually after the purchase order was generated).

Click on the **Descriptions** of the attachment you wish to view. The attachment is displayed in a new window. Attachments manually added to the purchase order are displayed here. Attachments created on the shopping cart and copied on to the purchase order are displayed with the purchase order line item.



The **Payment** tab fields are not a relevant at this time since invoicing capabilities are not used and since procurement card information is not kept.



The **Output** tab contains a complete log of all attempts to send the purchase order to the supplier. Since GoCM does not send purchase orders electronically to suppliers, the Output tab is not relevant to GoCM. This module will discuss how to print, preview and save purchase order for options on outputting GoCM purchase orders.

Display Purchase Order

[Order](#) [Hold](#) [Check](#) [Change](#) [Display](#) [Delete](#) [Complete](#) [Refresh](#) [Back to Initial Screen](#)
[Output Preview](#) [Download](#) [Upload](#)

Purchase Order Name Number

[Header Data](#) [Item Data](#)

[Basic Data](#) | [Documents](#) | [Payment](#) | [Output](#) | [Status](#) | [Document History](#) | [Approval](#) | [Versions](#)

Last Sent on	<input type="text"/>
With Output Medium	<input type="text"/>
Additional Output Requested via	
<input type="radio"/> Printer	<input type="text"/>
<input type="radio"/> Fax	<input type="text" value="613 249 2109"/>
<input type="radio"/> E-Mail	<input type="text" value="order_from_me@kernorton.ca"/>
<input checked="" type="radio"/> XML	
Log	Order and Send Immediately

The **Status** tab contains a complete history of all changes to the purchase order status. When a purchase order is initially created or when a change to a purchase order is processed, the system will automatically set the status codes as illustrated below with the final status being set to **Ordered**.

Display Purchase Order

Order Hold Check Change Display Delete Complete Refresh [Back to Initial Screen](#)
Output Preview Download Upload

Purchase Order Name ECSHOP002 25.04.2007 13:49 Number 4000000943

Header Data Item Data

[Basic Data](#) | [Documents](#) | [Payment](#) | [Output](#) | [Status](#) | [Document History](#) | [Approval](#) | [Versions](#)

System Status
Complete
Created
Document Completed
Ordered

The **Document History** tab contains the history of the original shopping cart, the purchase order and all follow-on documents created for the purchase order. The history only shows shopping carts that have been ordered.

Since there are no goods receipts or invoice postings in GoCM, the shopping cart and purchase order are the only documents displayed in the **Document History**.

Header Data Item Data

Basic Data | Documents | Payment | Output | Status | **Document History** | Approval | Versions

History

Shopping Cart 1000004299 Approved
Created on 01.11.2006 SR0CLNT100

Purchase Order 4000000663 Ordered
Created on 01.11.2006

Display as Graphic
 Display as Table

You can click on **Display as Table** to display the Document History in table format as demonstrated below.

Purchase Order Name ORDER ONE - nov 1 Number 4000000663

Header Data Item Data

Basic Data | Documents | Payment | Output | Status | **Document History** | Approval | Versions

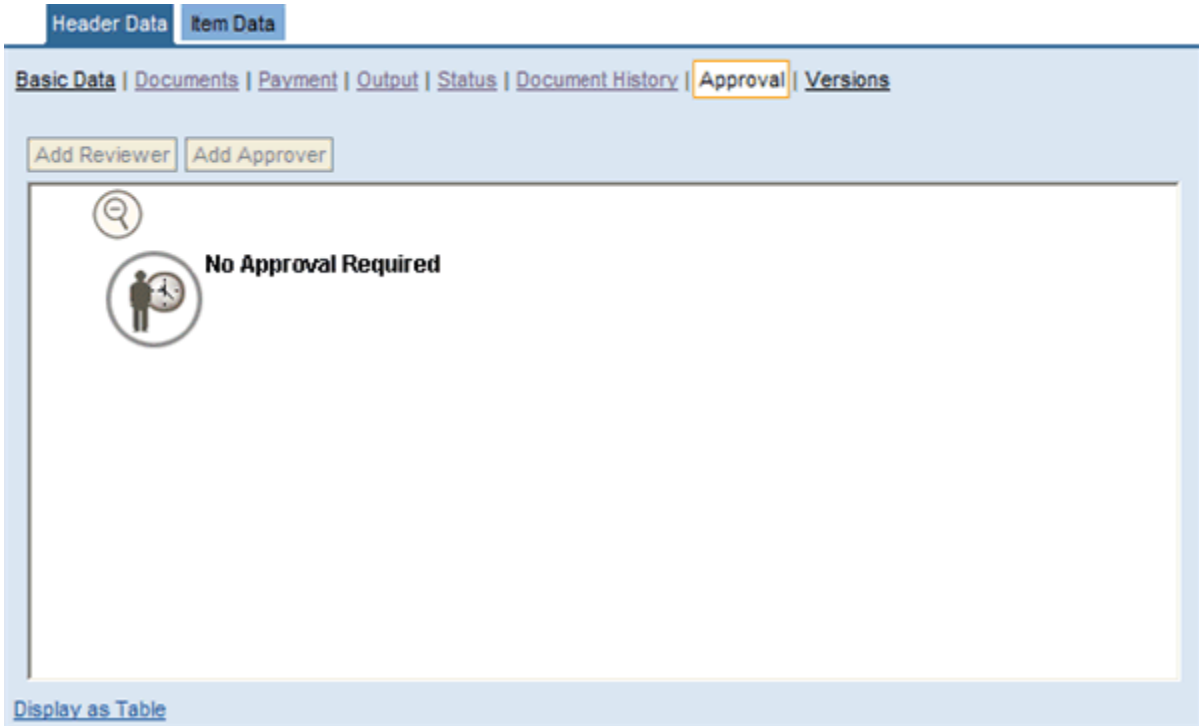
History

Document	Name of Document	Number of Document	Date	Status
Shopping Cart	ORDER ONE - nov 1	1000004299	01.11.2006	Approved
Purchase Order	ORDER ONE - nov 1	4000000663	01.11.2006	Ordered

Display as Graphic
 Display as Table

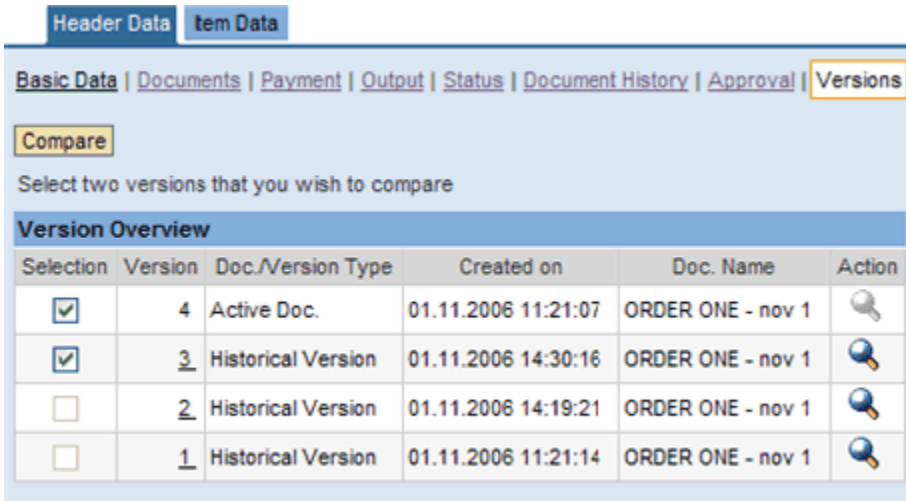
The **Approval** tab contains a complete history of all purchase order approvals.

Note: Since GoCM does use workflow approvals, the purchase order is approved automatically; therefore, approval preview will always indicate that the workflow was started and approved.



In the **Versions** tab, all versions of the purchase order are maintained. In addition to the audit trail maintained for all changes to the purchase order, when certain key fields are changed, a new purchase order version is created. For example, a new version is created whenever changes affecting the dollar value or delivery date are made. The purchase order versions can be displayed and compared using the Versions tab. Refer to **How track purchase order changes** for instructions on viewing change documents and comparing purchase order versions.

To compare two versions of a purchase order, click on the purchase orders you wish to compare using the checkboxes.



If you have more than one version of the purchase order, you can compare the various versions by clicking on the **Compare** button.

Below is the result of clicking the **Compare** button.

Versions: Details 4 and 3:

Only the data that is different in both versions is displayed

Expand All Collapse All

Header Data - No Changes Exist

Item Data

Material: Item (1)

Prices

Condition	Field	Version 4	Version 3
Price (Catalog)	COND_INACTIVE		Y
Price (Manual)		No Record Exists	Record Exists

Material: Item (2)

Prices

Condition	Field	Version 4	Version 3
Price (Catalog)	COND_INACTIVE		Y
Price (Manual)		No Record Exists	Record Exists

Displaying your Item Data

You can also view various details about the items in your purchase order by clicking on the **Item Data** tab.

Go Shopping My Purchase Orders My Reports

Process Purchase Orders

Display Purchase Order [Help](#)










Order Hold Check Change Display Delete Complete Refresh [Back to Initial Screen](#)

Output Preview Download Upload

Purchase Order Name ORDER ONE - nov 1 Number 400000663

Header Data **Item Data**

Item Overview

Item	Item Cat.	Description	Product	Product Category	Quantity	Gross Price	Net Price	Required on	Assigned to	Action
1	Material	Toner Cartridge -FP200/220/230/240/250/2		44103100	10 EA each	36.84 CAD Per 1	36.84 CAD	04.11.2006	Cost Center A001	  
2	Material	Toner Cartridge -HL 1030/1200 SERIES/144		44103100	10 EA each	150.73 CAD Per 1	150.73 CAD	04.11.2006	Cost Center A001	  
3	Material	Toner Cartridge -F-60/65M-4500/4700/V-1		44103100	10 EA each	72.21 CAD Per 1	72.21 CAD	04.11.2006	Cost Center A001	  

Total Val.: 2,597.80 CAD Tax Value: 155.87 CAD

Add Items Renumber Items Propose Sources of Supply Duplicate Selected Item

If you click on the item number of the purchase order you can view the following information about that line item as seen below:

Purchase Order Name ORDER ONE - nov 1 Number 400000663

Header Data Item Data

Basic Data | Partner | Prices | Documents | Account Assignment | Follow-on documents | Statistics | Purchase Order Response | Shipping Notification | Schedule Lines | < Previous Next > Back to Item Overview

Item 1: Toner Cartridge -FP200/220/230/240/250/2

1 2 3 4 5 6 7 8 9 10

Product	
Product Type	Material
Quantity	10 EA
Gross Price	36.84 CAD Per 1 each
Net Price	36.84 CAD
Net Value	368.40 CAD
Required on	04.11.2006
Incoterm	
Product Category	44103100 Printer and facsimile and photocopier supplies
Catalog	GoCM Catalog (all) Display Product in Catalog

The different types of tabs are defined below.

1. **Basic Data:** Provides details about the line item. You can also view the item in the catalog. It is here that you can view if the item was purchased on a procurement card (the **P-Card Indicator** flag will be checked off).
2. **Partner:** Provides detailed contact information.
3. **Prices:** Displays detailed line item pricing information. All prices should reflect the catalog price. Additional prices (e.g. manual price, discounts) may appear if this information was added manually after the purchase order was generated from the shopping cart.
4. **Documents:** Text and attachments entered with the shopping cart line item can be viewed here. By default the Vendor Text is displayed.
5. **Account Assignment:** Shows accounting information. The Account Assignment Overview is displayed showing all account assignment line items. **Note:** If the accounting information was split across several accounting codes (e.g. the line item was charged to multiple cost centers), **Multiple** would appear in the **Assigned to** column on the Account Assignment Overview screen.
6. **Follow-up Documents:** Shows the document control information (e.g. whether a purchase order response or a shipping notification is expected from the vendor) followed by the document flow display. The document flow displays the original shopping cart/shopping cart line item and the purchase order/purchase order line item. **Note:** Since there are no goods receipts or invoice postings in GoCM, the shopping cart and purchase order are the only documents displayed.

The last four items will not contain any information:

7. **Statistics:** If goods receipts and/or invoices were entered in GoCM, this tab would display the total quantity and total amount confirmed and invoiced.
8. **Purchase Order Response:** If suppliers were sending a POR confirming receipt of the electronic purchase order, this tab would display the POR details.
9. **Shipping Notification:** If suppliers were sending shipping notifications when items are shipped, this tab would display the shipping notification details.
10. **Schedule Lines:** Schedule Lines can only be completed before a purchase order has been ordered. Since purchase orders are automatically set to **Ordered** in GoCM, this functionality cannot be used.

Modifying your Purchase Order

If you need to change any information in your purchase order, you can do so by clicking on the **Change** button in the **Display Purchase Order** screen.

Go Shopping | **My Purchase Orders** | My Reports

[Process Purchase Orders](#)

Display Purchase Order

Order | Hold | Check | **Change** | Display | Delete | Complete | Refresh

Output Preview | Download | Upload

Purchase Order Name: ORDER ONE - nov 1 Number: 400000663

In the **Header Data** tab, under **Basic Data**, you can manually enter an Amendment Number, Amendment Amount and Backend PO number (taken from your department/agency's procurement system) as seen below.

Go Shopping | **My Purchase Orders** | My Reports

[Process Purchase Orders](#)

Change Purchase Order

Order | Hold | Check | **Change** | Display | Delete | Complete | Refresh [Back to Initial Screen](#)

Output Preview | Download | Upload

Purchase Order Name: ORDER ONE - nov 1 Number: 400000663

Header Data | Item Data

Basic Data | [Documents](#) | [Payment](#) | [Output](#) | [Status](#) | [Document History](#) | [Approval](#) | [Versions](#)

Document Date	01.11.2006
Total Value	2,597.80 Canadian Dollar
Tax Value	155.87 Canadian Dollar
Transaction Type	ECPO Purchase Order
Purchasing Organization	GoCM Purchasing Organization
Purchasing Group	PWGSC Purchasing Group
Amendment Number	<input type="text"/>
Amendment Amount	0.00
Backend PO Number	<input type="text"/>

If you go into the **Item Data** tab, you can also make amendments to the items in your purchase order.

For example, if you decide that you need to change the quantity of your order, in the **Item Data** tab, select the line item you want to add to, go to the **Quantity** field and make your change. Only click **Add Items** if you want to add a new line item.

Purchase Order Name: ORDER ONE - nov 1 Number: 400000663

Header Data **Item Data**

Add Shopping Cart Item Add Catalog It

Number of Shopping Cart: Start Search Item: Add Find in Catalog

Item Overview

<input type="checkbox"/>	Item	Item Cat.	Description	Product	Product Category	Quantity		
<input type="checkbox"/>	1	Material	Toner Cartridge -FP20	<input type="text"/>	44103100	10	EA each	36.84
<input type="checkbox"/>	2	Material	Toner Cartridge -HL 1	<input type="text"/>	44103100	10	EA each	150.73
<input type="checkbox"/>	3	Material	Toner Cartridge -F-60	<input type="text"/>	44103100	10	EA each	72.21
<input type="checkbox"/>	4	Material	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	5	Material	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Once you have completed your changes, click on **Check** to check your order. Once everything is ok, you can click on the **Order** button at the top left hand corner to create a new purchase order. You may also choose to hold or save the change for another time.

Change Purchase Order

Order Hold **Check** Change Display Delete Complete Refresh

Output Preview Download Upload

Purchase Order Name: ORDER ONE - nov 1 Number: 400000663

Header Data **Item Data**

Add Shopping Cart Item Add Catalog It

Number of Shopping Cart: Start Search Item: Add Find in Catalog

Item Overview

<input type="checkbox"/>	Item	Item Cat.	Description	Product	Product Category	Quantity		
<input type="checkbox"/>	1	Material	Toner Cartridge -FP20	<input type="text"/>	44103100	10	EA each	36.84
<input type="checkbox"/>	2	Material	Toner Cartridge -HL 1	<input type="text"/>	44103100	10	EA each	150.73
<input type="checkbox"/>	3	Material	Toner Cartridge -F-60	<input type="text"/>	44103100	10	EA each	72.21

Previewing, Printing and Saving your Purchase Order

Go to the **Header Data** tab and click on the **Output Preview** button to preview your purchase order.

Display Purchase Order

Order Hold Check Change Display Delete Complete Refresh

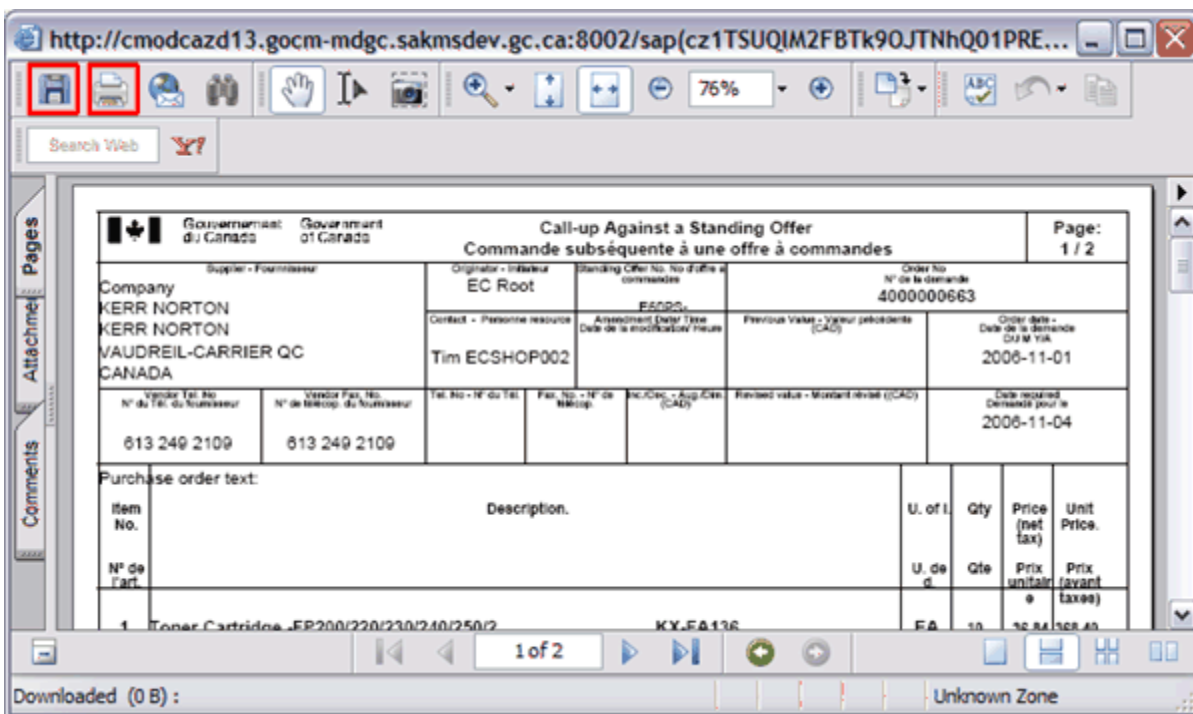
Output: Preview Download Upload

Purchase Order Name ORDER ONE - nov 1 Number 400000663

Note: The **Download** button is designed to download purchase order information into your department/agency's backend system. The output is technical in nature and it is recommended that it not be used unless you are transferring data to your system.

Adobe Acrobat will open up with your purchase order in view. Here you may select to print the document or save to your computer. Depending on the GC Agreement Type the form displayed in the preview window will be either the 942 or the 9200-11.

- GoCM Form 942 is used to display an order where the order items are for type SO (Standing Offer)



- GoCM Form 9200-11 is used to display an order where the order items are for type SA (Supply Arrangement)

Review and Try it Now

Review

In this module you learned how to find a Purchase Order by using the search functionality.

You also learned the various fields within the Purchase Order screen, how to make changes to your existing Purchase Order and how to print and save your Purchase Order.

Additional training tips on GoCM Purchase Orders can be found in the next section - ***Helpful Tips and Other Job Aids***.

You are now ready to move on to the next module: GoCM Reporting (Reporting 100).

Congratulations, you now have the skills to manage Purchase Orders in the GoCM!

Try it Now

You now have the option to complete an exercise on your own in GoCM. Try this exercise on creating a purchase order.

Log on to GoCM to complete this exercise.

You have created a shopping cart with two items: ECO conv- 2004 6.0L Chev Silverado/GMC and a battery (need to make sure they are two different SOs). Now proceed to creating and viewing your purchase order. Note: Because both items are part of separate Standing Offers, two Purchase Orders should be created.

1. Create and order a shopping cart with a ECO conv- 2004 6.0L Chev Silverado/GMC and a battery. (Save the cart with a name that is familiar to you).
 2. Go to the ***My Purchase Orders*** tab
 3. Search for your PO by ***Timeframe***. Select ***Today*** from the drop down menu and click ***Start***.
 4. Select your Purchase Order
 5. Go through the tabs to ensure the information is correct.
 6. Once you are satisfied, click on the ***Output Preview*** button. Adobe Acrobat will open up with your purchase order in view. There should be two separate purchase orders.
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Helpful Tips and other Job Aids

FAQs

- How to search for a purchase order?
 - How to display and change a purchase order's amendment number and amount?
 - How to display and change a purchase order's goods recipient, invoicing and ship-to addresses, for all line items?
 - How to display and change a purchase order's vendor text, special instructions and attachments?
 - How to display and change a purchase order's quantity, price and delivery date?
 - How to display and change between a purchase order's procurement card indicator and invoicing?
 - How to display and change a purchase order's goods recipient, invoicing and ship-to addresses, for one line item?
 - How to display and change a purchase order's item level attachments?
 - How to copy and insert an account assignment for one item and all items?
 - How to preview the printed version of a purchase order?
 - How to print a purchase order?
 - How to save the purchase order output as a PDF?
 - How to download a purchase order as an Excel spreadsheet?
 - How to delete a purchase order?
 - How to display and enter your departmental purchase order number on your GoCM purchase order?
 - How to add and/or delete an item in a purchase order?
 - How to track purchase order changes?
 - Special Instructions for First Right of Refusal Purchasing Process
 - How purchase order forms are selected
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