

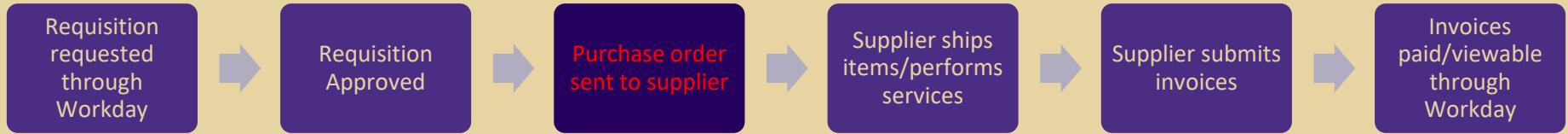
# Purchase Orders



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# PURCHASE ORDER PROCESS



You are here



# Creating the Requisition - REMINDER

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## Selecting the Supplier

### Selecting the correct supplier:

- **PO will be submitted to the incorrect supplier**
  - **Payment goes to incorrect supplier**
    - **Getting the funds back**
    - **Cancelling and creating RQ with correct supplier; you lose time**

# AGENDA

- **What is a Purchase Order?**
- **Overview of Purchase Order Elements**
  - **Purchase Order Header Elements**
  - **Purchase Order Line Detail Elements**
- **Managing your Purchase Orders**
- **Troubleshooting**

## **2 KEY TAKE AWAYS**

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- **Where to locate Elements of the PO**
- **Recognize the Element and if management actions are needed**



# What is a Purchase Order?

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Did you know?

A Purchase Order is *not*: an invoice payment request



A Purchase Order performs the following functions:

- Internal documentation of budget, and compliance approvals
- A commitment of funds to a supplier or entity to purchase goods/services
- A legally binding contract that outlines the terms and conditions between the parties (UW and the Supplier)
- An internal mechanism to manage your purchase.

# Purchase Order Header Elements

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# **Purchase Order Header Elements**

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**LIVE PURCHASE ORDER: PO-0100094318**

## **Purchase Order #**

- used for tracking, invoicing and identification of the order to the supplier

## **Purchase Order Version**

- Displays when there has been a purchase order change to the original PO.

## **Change Order Reason**

- Reason: short header of WHAT type of Change Order was processed
- Comments: short description of WHY the change order was needed



# Purchase Order Header Elements

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LIVE PURCHASE ORDER: PO-0100094318 & PO-0100083652

## Purchase Order Status:

- In Progress
- Approved
- Issued
- Change Order in Progress
- Closed
- Cancelled

## Invoice Status | Receiving Status:

- indicates if invoicing or receiving have been performed

# Purchase Order Header Elements

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LIVE PURCHASE ORDER: PO-0100083652

**Issue Option:** How the PO is issued to the supplier

- Email
- EDI/Auto
- Print

**Supplier PO Issue Email:** Displays the email used to issue the PO to

**Memo:** Anything in this box will print on the face of the PO to the Supplier

**Internal Memo:** For internal use only, will not print on the face of the PO

# Purchase Order Line Detail Elements

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# Purchase Order Line Detail Elements

LIVE PURCHASE ORDER: PO-0100094318 and PO-0100083652

- **Goods lines and Service lines**
  - **Spend Category** - Determines routing, approvals, and taxability.
  - **Tax options**
  - **Amount (Service Lines) / Quantity (Goods Lines)**
    - **Ordered** (*\$ ordered or # ordered*), **Received** (*by unit*) and **Invoiced** (*by Supplier*)
  - **Business Documents Lines**
    - **RC #** : **Receipt Status** (*in process, draft, approved, cancelled*)
    - **RQ #** : **Requestion**
    - **SI #** : **Invoice** (*in process, draft, approved, cancelled*)

# Purchase Order Line Detail Elements

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LIVE PURCHASE ORDER: PO-0100094318 and PO-0100079624

- **Version History** (PO-0100094318)
  - **Prior Versions**
  - **Pending Versions**
- **Process History - example** (PO-0100079624)
  - **Shows approval flow and awaiting Actions**

# Purchase Order Line Detail Elements

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LIVE PURCHASE ORDER: PO-0100079624

- **Attachments**
  - Agreements
  - Approvals
  - Sole source
- **Printing Runs**
  - PDF version of the PO sent to the supplier
- **Balances**
  - Show the obligated amounts of the PO

# The PO Our Suppliers See

Boilerplate  
Language how  
to invoice via GHX

Memo  
Displays  
here

UW Terms &  
Conditions on the PO

Line Memo: for  
supplier only

## UNIVERSITY of WASHINGTON

**University of Washington**  
4300 Roosevelt Way NE, 3rd Floor  
Box 354967  
SEATTLE, WA 98195-4967  
United States of America

### Purchase Order

Purchase Order Number	PO-010094274
Purchase Order Date	8/29/24
Requested Delivery Date	
Payment Terms	Net 30
Contact	206-543-4500 pohelski@uw.edu
Requested By	O'Hara, She Her, Sarah
Requester Email	sazama529@uw.edu
Requester Phone	+1 (206) 616-7022

**Instructions**

Attention Supplier: We are partnering with GHX to convert emailed and paper invoices into electronic EDI to facilitate processing into Microsoft. If you are not an registered GHX supplier wishing an electronic EDI invoice stream, we ask that you email your PDF invoice to: [webinvoicing@universityofwashington.edu](mailto:webinvoicing@universityofwashington.edu) or send your invoice to PO Box, PO BOX 31327, Salt Lake City, UT 84131. Do not send invoices to our Bill-to street address. Invoices sent to our Bill-to street address may have delay in payment processing.

**Supplier:**

AMI SYSTEMS INC  
9625 W 70TH ST  
STE 200  
EDEN PRAIRIE, MN 55344  
United States of America  
SPL-010392

**Ship To:**

University of Washington  
Life Sciences Building  
3747 West Stevens Way NE  
Seattle, WA 98195  
United States of America  
O'Hara, She Her, Sarah; +1 (206) 616-7022  
Deliver To: B147A Life Sciences Bldg Floor B1

**Comments:**

Quote 1281064  
Please contact UW Biology IT Director Dave Hurley for scheduling and assistance.

The following Terms and Conditions shall apply to this order. In the event of any inconsistencies or conflicting terms and conditions in this Contract, such inconsistency, or conflict shall be resolved by giving precedence in the following order:

- Federal, state, or local laws or regulations
- UW General Terms and Conditions

Currency	Total Lines Amount	Total Tax Amount	Freight Amount	Other Charges	Total PO Amount
USD	9,904.64	1,034.44	0.00	0.00	11,029.08

**Shipping Terms**

Shipping Instruction

FOB Destination

Goods Lines										
Line	Qty	UOM	Supplier Part Number	Manufacturer Part Number	Item Identifier	Description	Required Date	Unit Price	Line Amount	Gross Amount
1	1	Each				Equipment (see quote 1281064 for itemized list)		5,540.96	5,540.96	573.49
3	1	Each				Shipping & Handling		428.00	428.00	44.40

Line Memo: Includes display, cables, wall plates, et al.  
Deliver to: B147A Life Sciences Bldg Floor B1  
Deliver to: B147A Life Sciences Bldg Floor B1

Service Lines										
Line	Qty	Item	Description	Start Date	End Date	Due Date	Line Amount	Tax	Gross Amount	
2			Integration (see quote 1281064 for itemized list)				4,024.68	416.55	4,441.23	

Deliver to: B147A Life Sciences Bldg Floor B1

**Messages**

This Purchase Order is subject to University of Washington General Terms and Conditions available at: <https://finance.uw.edu/pa/suppliers/terms-conditions>

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# Live Demo – View PO in Workday

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***BE BOUNDLESS***





# Manage Purchase Orders in Workday

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# Purchase Order Management

- **Analogy:** your Purchase Order is **not only** a contract – it is also similar to an account you write “checks” or debits (invoices/purchases) against.
- When the PO is out of money, invoices cannot be paid (just like your own personal bank account)



# **Managing your Purchase Orders**

**The PO issued is your one stop shop for the procure-to-pay process.**

**Managing your PO is crucial to ensure everything goes smoothly in this process.**

# Managing your Purchase Order

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TRACK THE ORDER



MANAGE SUPPLIER  
INVOICES



RECEIVE  
GOODS/SERVICES



MANAGE  
BUDGET/FUNDS



**Click into your PO elements – blue text are links –  
Live example: [PO-0100083652](#)**

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# **Managing your Purchase Order**

**Handle Discrepancies**

**Update Records**

**PO Closure**

**Analyze and Report**

# Managing your Purchase Orders

## Why is it important?

- By actively managing your POs, you can ensure timeliness of deliveries/project completion, accurate/timely payments, and better overall procurement efficiency.

## What is the impact?

- Suppliers may stop work or operations; not just at your department, but across the University as a whole.

Operational shutdowns can impact research, classes, employment, and deadlines.

# Common Purchase Order Issues

## Purchase Order is out of funds:

Quantity/Amount *Invoiced* greater than  
Quantity/Amount *Ordered*

Submit Change PO

## Quantity *Received* is zero (no receipt)

System Receiving by local  
Department/Unit

## Purchase Order budget (Worktags) expired

Submit Change PO

## Purchase Order with Goods Line instead of Service Line

- Unit of measure used: "Lump Sum" or "Lot"

Submit Change PO

## Obligation Amount Remaining is not zero

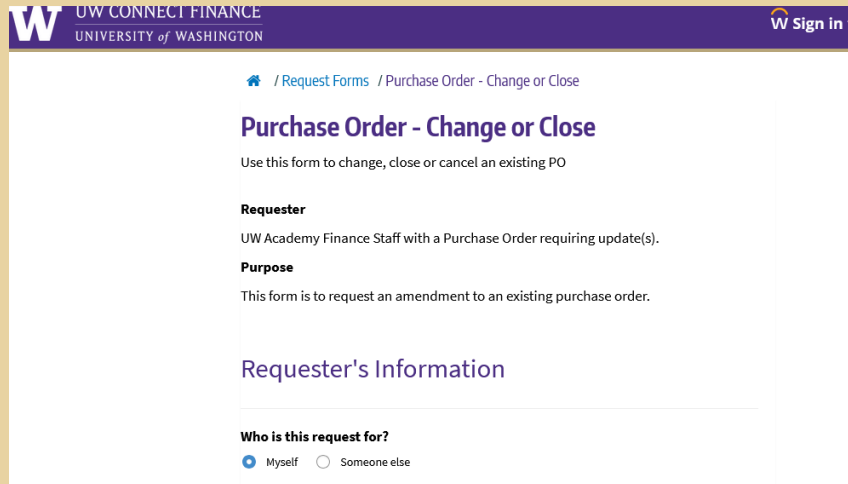
Submit Close PO request



# How do I update my Purchase Orders?

Purchase Order Change/Close form:

[https://uwconnect.uw.edu/finance?id=sc\\_cat\\_item&sys\\_id=df0175731ba1b5d0cc990dc0604bcbed](https://uwconnect.uw.edu/finance?id=sc_cat_item&sys_id=df0175731ba1b5d0cc990dc0604bcbed)



The screenshot shows the 'Purchase Order - Change or Close' form in the UW Connect Finance system. The header includes the UW logo, 'UW CONNECT FINANCE UNIVERSITY of WASHINGTON', and a 'Sign in to' button. The breadcrumb trail is '/ Request Forms / Purchase Order - Change or Close'. The main heading is 'Purchase Order - Change or Close' with a sub-instruction: 'Use this form to change, close or cancel an existing PO'. The form contains two sections: 'Requester' with the text 'UW Academy Finance Staff with a Purchase Order requiring update(s).', and 'Purpose' with the text 'This form is to request an amendment to an existing purchase order.'. Below this is a section for 'Requester's Information' which is currently empty. At the bottom, there is a question 'Who is this request for?' with two radio button options: 'Myself' (which is selected) and 'Someone else'.

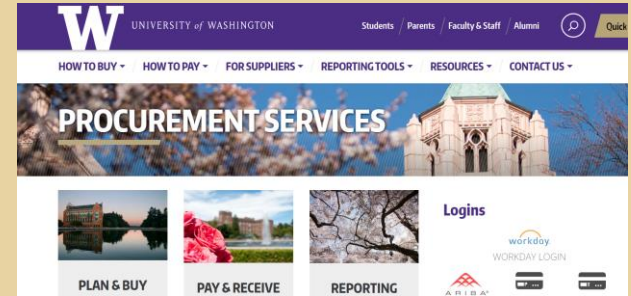




# RESOURCES

## Procurement Services Website:

- **How to Buy:**  
<https://finance.uw.edu/ps/how-to-buy>
- **How to Pay:**  
<https://finance.uw.edu/ps/how-pay/invoicing>
- **Workday Invoicing:**  
<https://finance.uw.edu/ps/how-pay/invoicing>
- **System Receiving:**  
<https://finance.uw.edu/ps/how-to-pay/receiving>
- **Procurement Resource List:**  
<https://finance.uw.edu/ps/resources/resourcelist>
- **Subject Matter Experts:**  
<https://finance.uw.edu/ps/contact-us/subject-matter-experts>
- **Reporting Tools:**  
<https://finance.uw.edu/ps/reporting-tools>



# THANK YOU



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