Identifying Requesters of Purchase Orders
What’s different in UD Exchange?

Identifying Requesters

- In Web Forms, this information is available in the Requisition and could not be changed
- In UD Exchange, this information can be found in the Requisition and on the Purchase Order and can be changed by Procurement if needed
Identifying Requesters of Purchase Orders

• When a Purchase Order (PO) is created, it is important to be able to identify the Owner and the Requester
• There are usually two main parties involved in most POs:
  – The Owner of the PO is, by default, the Shopper who created the original shopping cart
  – The Requester of the PO who turned the cart into a Requisition
• At some point, one may need to know the owner of the PO for order confirmation, shipping updates, issues and questions from suppliers and more

Sometimes the Shopper and Requester are the same person, since Requesters can also shop!
Identification in UD Exchange

• The PO Owner and Requester can be found in the Requisition
  – The Shopper / Owner is identified in the “Prepared For” field
  – The Requester is identified in the “Prepared By” field
After entering the Requisition Number in the search field
1. Select **Summary** from the menu
2. The Requester is in the **Prepared By** field
3. The Shopper / Owner is in the **Prepared For** field

This information automatically populates if the Shopper (here, Sean) assigns their cart to a Requester (George). The Requester can also change the Prepared For user manually.
Identification on a Purchase Order

- Internal users and Suppliers can also find the Owner on the PO
  - The Shopper / Owner is clearly identified in the header of the PO
  - Suppliers may use this information for questions regarding the order, although the buyer’s name is also included on non-catalog purchase orders
After entering the Purchase Order Number in the search field
1. Select the **Status** tab

See PO Owner name (Shopper/Prepared By” here)
The Revisions screen will present all the versions of the PO available. In almost all cases, the most recent version will be the one to select.

1. Revisions are listed newest to oldest by Revision Date
2. Select the HTML Body Email PO link
On the Purchase Order screen
1. Scroll down to the **Shipping Instructions** section
2. The Owner is identified as the **Contact** in the **Requestor Information** section
Owner Changes for a Purchase Order

– Occasionally, it may be necessary to change the Owner of a PO
  • Example: the Owner has changed departments
– To change the owner of a PO, someone should post a comment in the PO tagging Procurement Help, naming the new PO owner
– Department Access will also change based on the new PO owner’s department.
Choose **Add Comment** from the dropdown menu in that purchase order.
1. Choose **Add Email Recipient**
2. Search on last name **Help**
3. Select **Procurement Help** from the available options.
1. Type a comment requesting the change of PO owner.
2. Click Add Comment.
Resources

Procurement Services
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