Searching for Purchase Orders
What’s different in UD Exchange?

PO Search

In PeopleSoft, one could search for POs according to several factors like vendor, number, date, buyer or requisition number, each in its own field using qualifiers like “contains” and “begins with”.

In UD Exchange, one can perform the same search using the same factors, or even the name of the item ordered, all in a single field.
Searching for Purchase Orders

- There are three convenient ways to search for Purchase Orders from your Home Screen in UD Exchange:
  - Using the general search bar at the top of the screen
  - Using a general document search in the Orders menu
  - Referring to the My Purchase Orders section on your dashboard
Searching for Purchase Orders

General Search Bar
If you know the PO number, go to the top of any page
1. Select **Purchase Order Number**
2. Enter the number in the search box
3. Select the magnifying glass to proceed
The search will take you to the Search Purchase Orders window,
1. The PO can be found by clicking on the PO number link
2. Additionally, this screen has advanced search features, which are featured in the Enhanced Search guide.
The PO link will take you directly to the PO.

<table>
<thead>
<tr>
<th>Line</th>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
<th>Supplier</th>
<th>Receiving</th>
<th>Invoicing</th>
<th>Matching</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cannon Hall Deep Well System Invoice 21002</td>
<td></td>
<td>EA</td>
<td>25,040.00</td>
<td>1 EA</td>
<td>25,040.00 USD</td>
<td>Sent To Supplier</td>
<td>none</td>
<td>fully invoiced</td>
<td>no matches</td>
</tr>
</tbody>
</table>

Shipping, handling, and tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.
Searching for Purchase Orders

General Document Search in the Orders Menu
If you have some general information about the PO (vendor, items ordered, etc.), but may want to see related documents as well

1. Open the Orders menu on the home screen
2. Type your keyword in the search field (“mason” in this example)
3. Select the magnifying glass to proceed
The search will take you directly to a list of documents (in this case, POs and requisitions) that met your search criteria.

Please see the Enhanced Search guide for additional steps and details.
Searching for Purchase Orders

My Purchase Orders on Your Dashboard
Scroll down on your Shopping Home Page dashboard to the **My Purchase Orders** section

1. Your five most recent POs will be listed here
2. Select **Search My Purchase Orders** to see more

“View as Graph” will give a visual depiction of pending, completed and rejected purchase orders with the ability to click through.
This will take you to a list of all your POs, which can be

1. Filtered and saved for future searches and refined using several criteria to narrow your search

Please see the Enhanced Search guide for additional steps and details.
Resources

Procurement Services
procurement@udel.edu
See also, “Enhanced Search” guide