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 four 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 targeted document search in the Orders menu
  - 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 directly to the latest version of the PO.

<table>
<thead>
<tr>
<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>Kirkbride Ceiling Repair</td>
<td></td>
<td></td>
<td>$1,476.00</td>
<td>1 EA</td>
<td>5,147.60 USD</td>
<td>New Order</td>
<td>none</td>
<td>none</td>
<td>No Matches</td>
</tr>
<tr>
<td>Additional columns per quote</td>
<td></td>
<td></td>
<td>3,800.00</td>
<td>1 EA</td>
<td>3,800.00 USD</td>
<td>New Order</td>
<td>none</td>
<td>none</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.

Total: 55,276.00 USD
Searching for Purchase Orders

Targeted Document Search in the Orders Menu
If you have some general information about the PO (vendor, items ordered, etc.)
1. Open the **Orders** menu on the home screen
2. Select **Search Documents**
On the Search Documents page:
1. Select Purchase Orders from the drop-down menu
2. Enter the information you have (the vendor name in this example)
3. Select a date range to help narrow your search
4. After you have entered your search criteria, click Go

Click on Advanced Search to search by item, status, account code, or many other attributes.
The search will take you directly to a list of POs that met your search criteria.
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 want to see related documents as well:
1. Open the **Orders** menu on the home screen
2. Type your keyword in the search field (“painting” 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, requisitions and change requests) that met your search criteria.
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
2. Refined using several criteria to narrow your search
Resources

Procurement Services
procurement@udel.edu