



Lowe'sLink[®]
Spend Management (SM)
Review Purchase Orders

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Agenda

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Expectations

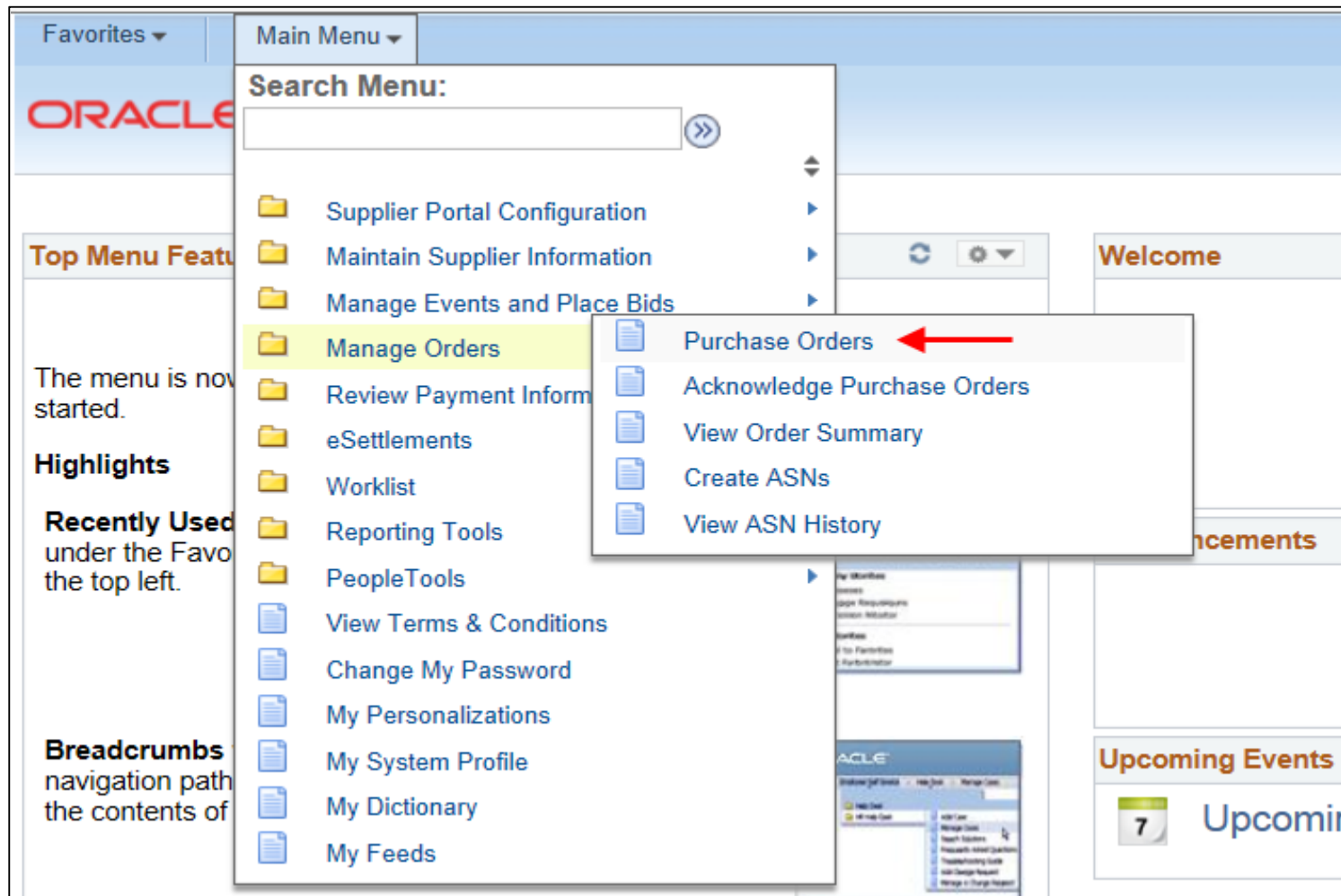
- This guide is written with the expectation that the user is registered for Spend Management.
- If not registered, please refer to the *LowesLink® Registration and Requesting Access to Spend Management* document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > For New Vendors.
- Also, that the user is familiar with logging into LowesLink®, locating the Spend Management US & Canada link, and logging into Oracle.
- If unfamiliar with logging in, please refer to the ***Logging into LowesLink® and Spend Management*** document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > Job Aids.
- If having login issues, please refer to the ***Login Password Issues*** document located at www.LowesLink.com > Existing Partner Information > Spend Management Expense Vendor Information > Job Aids.

Introduction

- Reviewing Purchase Orders (PO's) is essential to a successful supplier/client relationship.
- PO's give the supplier specific information (including items, quantities, pricing, shipping, distribution, and delivery), regarding goods and services the client has ordered.
- The Review Purchase Orders option allows review of PO's and change requests that have been submitted.
- **Note:** After being fully on-boarded to the system, PO confirmation emails are automatically sent upon dispatch containing a PDF copy of the PO to the email address in the Main Menu > Maintain Supplier Information > Addresses application where you can edit the Order address and email information.

Review Purchase Orders Application Menu

Navigate: Main Menu > Manage Orders > Purchase Orders



Search for the Purchase Order

- Search by PO number or date range to find PO's that have been issued for your company by entering the information into the Search Criteria fields.
- If the PO number does not fall within the pre-populated dates, then change or delete the date range.
- **Note:** To search for an individual PO, enter the PO number in both the From & To fields, and delete the dates.
- Option: Search can be submitted without any criteria to view a list of all available PO's however this type of search may cause the search to timeout .

Favorites > Main Menu > Manage Orders > Purchase Orders

ORACLE

Purchase Orders

Filter Options

Supplier Name Displays Here

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From PO ID

To PO ID

PO's Waiting Acknowledgement

Item ID

Supplier Item ID

From Date (example: 01/31/2000)

To Date (example: 01/31/2000)

Buyer

Contract ID

Contract Version

Release

Search

Search for the Purchase Order - Example

- Input Search criteria and click the Search button.
 - Option: Search with no criteria to view a list of all available PO's.
- If no search results are found, refine the search criteria.

Favorites ▾ Main Menu ▾ > Manage Orders ▾ > Purchase Orders

ORACLE

Purchase Orders
Filter Options
Supplier Name Displays Here

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From PO ID 🔍 PO's Waiting Acknowledgement

To PO ID 🔍

Item ID 🔍

Supplier Item ID 🔍

From Date 📅 (example: 01/31/2000)

To Date 📅 (example: 01/31/2000)

Buyer 🔍

Contract ID 🔍

Contract Version

Release

Search

Search for the PO's Waiting Acknowledgement

- To search for Purchase Orders (PO's) Waiting Acknowledgement, select that option radio box.
- Click the Search button. The Purchase Orders List page will display.
- If no search results are found, refine the search criteria.

Favorites ▾ Main Menu ▾ > Manage Orders ▾ > Purchase Orders

ORACLE

Purchase Orders

Filter Options

Supplier Name Displays Here

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From PO ID 🔍

To PO ID 🔍

Item ID 🔍

Supplier Item ID 🔍

From Date 📅 (example: 01/31/2000)

To Date 📅 (example: 01/31/2000)

Buyer 🔍

Contract ID 🔍

Contract Version

Release

PO's Waiting Acknowledgement

Results of the Purchase Order Search

Oracle
Purchase Orders
Purchase Order List
Supplier Name Displays Here

POs Returned 23
Default View for Change Orders All lines

Shows number of Search results → Orders Per Page 012 First 1 to 12 of 23 Last

Purchase Order List
PO Details Header Details Personalize Find View All

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status		
<input type="checkbox"/> 0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN	View PDF
<input type="checkbox"/> 017010802			69	35.10 USD	New	Create ASN	View PDF
<input type="checkbox"/> 017010801			300	160.44 USD	New	Create ASN	View PDF
<input type="checkbox"/> 017010801			300	168.48 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108019	Dispatched	03/22/2017 10:02:39AM	300	163.05 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108020	Dispatched	03/22/2017 10:02:39AM	300	168.03 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108021	Dispatched	03/22/2017 10:02:39AM	300	170.37 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108022	Dispatched	03/22/2017 10:02:39AM	300	168.15 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108023	Dispatched	03/22/2017 10:02:39AM	300	165.36 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108024	Dispatched	03/22/2017 10:02:39AM	300	163.20 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108025	Dispatched	03/22/2017 10:02:39AM	300	165.84 USD	New	Create ASN	View PDF
<input type="checkbox"/> 0170108026	Dispatched	03/22/2017 10:02:39AM	300	162.96 USD	New	Create ASN	View PDF



Select All Clear All

The View PDF button allows you to generate a printable version of the purchase order. Using the Default View for Change Orders options you can control if the report generated shows all

View Selected POs in Downloadable Format

View Selected POs in Downloadable Format Option


- If necessary to download the details for specific PO's:
 - Click in the radio box to the left of the PO to select.
 - Click the View Selected POs in Downloadable Format button.
 - A new window opens with the selected PO's details.

Purchase Order List Personalize | Find | View All |  | 

PO Details | **Header Details**

Purchase Order ▲	Status	Last Dispatched Date/Time	Lines▲	Total Amount	Acknowledge Status▲			
<input checked="" type="checkbox"/> 0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN		View PDF
<input checked="" type="checkbox"/> 0170108018	Dispatched	03/22/2017 10:02:39AM	300	168.48 USD	New	Create ASN		View PDF
<input checked="" type="checkbox"/> 0170108019	Dispatched	03/22/2017 10:02:39AM	300	163.05 USD	New	Create ASN	View ASNs	View PDF
<input type="checkbox"/> 0170108027	Dispatched	03/22/2017 10:02:39AM	69	35.10 USD	New	Create ASN		View PDF

[Select All](#) [Clear All](#)

[View Selected POs in Downloadable Format](#) 

The View PDF button allows you to generate a printable version of the purchase order. Using the Default View for Change Orders options you can control if the report generated shows all

View Download POs in Downloadable Format Option


- Click the **Download Purchase Orders Table to Excel** option

PO download to grid for Supp

Purchase Orders

Download Purchase Orders

Customize the grid to show the desired columns, then click on the download to grid icon in the grid header to load the data into an excel spreadsheet.

Purchase Orders Personalize | Find | View 100 |  First 1-100 of 901 Last

Date/Qty Details | Header Details | Header Comments | Line Details | Line Comments | Schedule Details | Ship To Comments

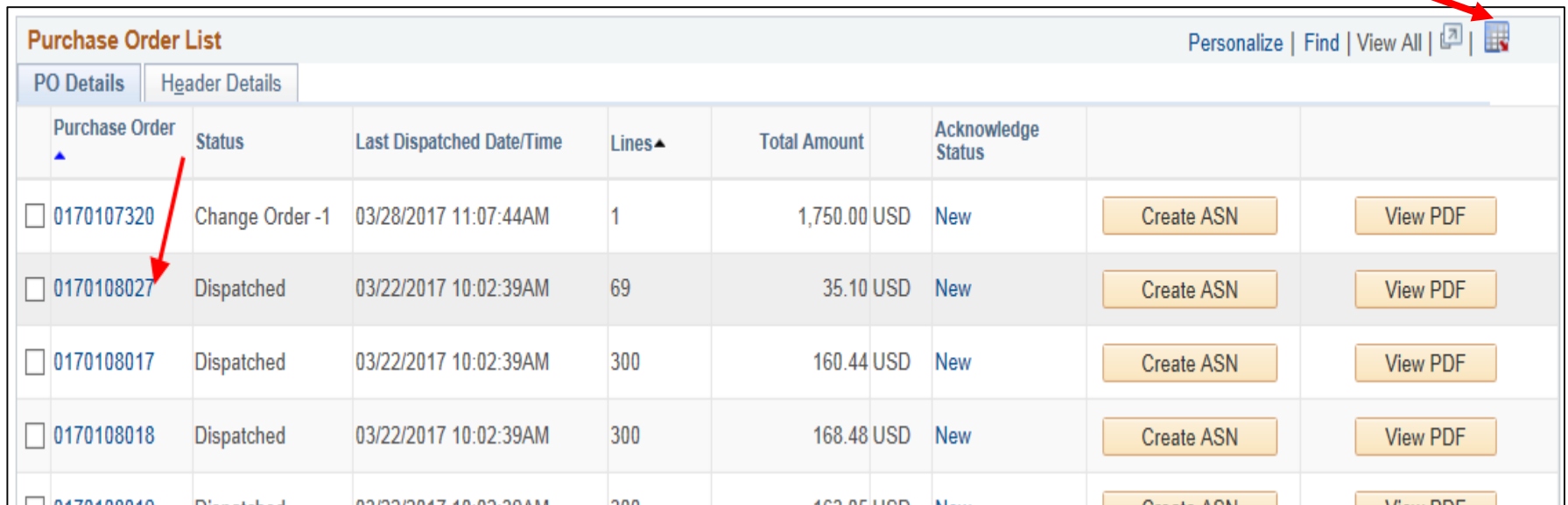
PO Number▲	Line	Schedule	Item ID	Description	Revision	Due Date	PO Qty	UOM	Price	Merchandise Amount	Freight/Tax/Misc.	Currency
0170107320	1	1	Z-222	Z-222 Example Item		02/20/2017	35.0000	EA	50.00000	1750.00	0.000	USD
0170108017	101	1	Z-222	Z-222 Example Item		03/22/2017	2.0000	EA	1.45000	2.90	0.000	USD
0170108017	102	1	Z-223	Z-223 Example Item		03/22/2017	1.0000	EA	0.14000	0.14	0.000	USD
0170108017	100	1	Z-224	Z-224 Example Item		03/22/2017	1.0000	EA	0.14000	0.14	0.000	USD


Return ← When finished with download, click to return to previous screen.

Download Purchase Orders Table to Excel option

Purchase Order – View Options

- PO's can be viewed by clicking the PO number link (on the left side of the screen) or the View PDF button (on the right side of the screen).
- The PO number link opens the Purchase Order Details page to view line details.
- **Note:** The grid icon next to the page number buttons on any page will download the information showing into an excel spreadsheet.



Purchase Order List		Personalize Find View All 						
PO Details		Header Details						
Purchase Order	Status	Last Dispatched Date/Time	Lines▲	Total Amount	Acknowledge Status			
<input type="checkbox"/> 0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN	View PDF	
<input type="checkbox"/> 0170108027	Dispatched	03/22/2017 10:02:39AM	69	35.10 USD	New	Create ASN	View PDF	
<input type="checkbox"/> 0170108017	Dispatched	03/22/2017 10:02:39AM	300	160.44 USD	New	Create ASN	View PDF	
<input type="checkbox"/> 0170108018	Dispatched	03/22/2017 10:02:39AM	300	168.48 USD	New	Create ASN	View PDF	
<input type="checkbox"/> 0170108019	Dispatched	03/22/2017 10:02:39AM	300	168.95 USD	New	Create ASN	View PDF	

Purchase Order – View PDF Option

- The .pdf link sometimes takes a few minutes to open the document.

The screenshot shows the Oracle Purchase Order List interface. The breadcrumb navigation is 'Favorites > Main Menu > Manage Orders > Purchase Orders'. The page title is 'Purchase Orders' and 'Purchase Order List'. Below the title, it says 'Supplier Name Displays Here'. There are 'POs Returned 23' and a 'Default View for Change Orders' dropdown set to 'All lines'. The 'Orders Per Page' is set to '012', and the page is '1 to 12 of 23'. The 'Purchase Order List' table has columns for 'Purchase Order', 'Status', 'Last Dispatched Date/Time', 'Lines', 'Total Amount', and 'Acknowledge Status'. The first two rows are visible: one with PO 0170107320 (Change Order -1) and one with PO 0170108027 (Dispatched). Each row has a 'View PDF' button. A red arrow points to the 'View PDF' button for PO 0170108027. A 'Message' dialog box is overlaid on the screen, with a red arrow pointing to the 'Message' title. The message text reads: 'Process to generate PO output file, is taking longer than expected. (7026,186) To allow your session to continue, this job will finish in the background. Please wait a minute or so and then press the button again to bring up the PO for printing. (You must stay within this component, or pressing the button will cause the report to be resubmitted.)' There is an 'OK' button at the bottom of the dialog.

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status	Buttons
0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN, View PDF
0170108027	Dispatched	03/22/2017 10:02:39AM	69	35.10 USD	New	Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF
						Create ASN, View PDF

Purchase Order – View PDF Option

- May also see this message if clicking View PDF link again and it still is not ready.

The screenshot shows the Oracle Purchase Order List interface. The breadcrumb navigation is 'Favorites > Main Menu > Manage Orders > Purchase Orders'. The Oracle logo is in the top left. The page title is 'Purchase Orders' and 'Purchase Order List'. Below the title, it says 'Supplier Name Displays Here'. There are 'POs Returned 23' and a 'Default View for Change Orders' dropdown set to 'All lines'. The 'Orders Per Page' is set to '012'. Navigation buttons for 'First', '1 to 12 of 23', and 'Last' are visible. The table has columns for 'Purchase Order', 'Status', 'Last Dispatched Date/Time', 'Lines', 'Total Amount', and 'Acknowledge Status'. Each row has 'Create ASN' and 'View PDF' buttons. A red arrow points to the 'View PDF' button for PO 0170108027. A message dialog box is overlaid on the table with the text: 'Message', 'Process is still running. (7026,187)', 'PO is not available yet for printing. Try again in a few seconds.', and an 'OK' button. A red arrow points to the 'Message' text in the dialog.

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status	Buttons
0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN, View PDF
0170108027	Dispatched	03/22/2017 10:02:39AM	69	35.10 USD	New	Create ASN, View PDF
0170108017	Dispatched	03/22/2017 10:02:39AM	300	160.44 USD	New	Create ASN, View PDF
017010				168.48 USD	New	Create ASN, View PDF
017010				163.05 USD	New	Create ASN, View PDF
017010				168.03 USD	New	Create ASN, View PDF
017010				170.37 USD	New	Create ASN, View PDF

Open the Purchase Order Using the Link Option



- The Purchase Order Details page will display line information for each line.
 - Note: Each PO can have a maximum of 300 lines.
- Click the line number to see the Purchase Order Schedule as well as any line comments entered by the requestor.
- Any invoices that have been entered on this PO will be visible under Invoice List.

Purchase Order Lines							Personalize	Find	View All			First	1-69 of 69	Last
Line Information	Extension	Line Details	Contract Info											
Line▲	Status	Item ID	Description	Quantity	Merchandise Amt									
1	Active	Z1230	Example Item - One	2.0000 EA	2.90 USD									
10	Active	Z1231	Example Item - Two	1.0000 EA	0.14 USD									

Invoice List							Personalize	Find	View All			First	▲
Invoice▲	Invoice Date	Amount▼	Due Date	Appr Stat	Voucher								
		0.000											


View Multiple Purchase Orders

- To view multiple PO's together in a downloadable format, select the desired PO's using the checkbox to the left of each PO, then click the View PO's in Downloadable Format button.

Purchase Order List Personalize | Find | View All |  

PO Details | **Header Details**

Purchase Order	Status	Last Dispatched Date/Time	Lines▲	Total Amount	Acknowledge Status		
<input checked="" type="checkbox"/> 0170107320	Change Order -1	03/28/2017 11:07:44AM	1	1,750.00 USD	New	Create ASN	View PDF
<input checked="" type="checkbox"/> 0170108027	Dispatched	03/22/2017 10:02:39AM	69	35.10 USD	New	Create ASN	View PDF

[Select All](#)  [Clear All](#)

[View Selected POs in Downloadable Format](#)

The View PDF button allows you to generate a printable version of the purchase order. Using the Default View for Change Orders options you can control if the report generated shows all lines or only the latest changes. (This same option is also used to control the online view of the PO.)

Downloaded Purchase Orders

- The selected PO's will be displayed. To customize the column headers and rearrange the data, select the Personalize option (see next slide).
- Note: The grid icon next to the page number buttons on any page will download the information showing into an excel spreadsheet.

PO download to grid for Supp

Purchase Orders

Download Purchase Orders

Customize the grid to show the desired columns, then click on the download to grid icon in the grid header to load the data into an excel spreadsheet.

Personalize | Find | View All | First 1-70 of 70 Last

Date/Qty Details	Header Details	Header Comments	Line Details	Line Comments	Schedule Details	Ship To Comments					
PO Number	Line	Schedule	Item ID	Description	Revision	Due Date	PO Qty	UOM	Price	Merchandise Amount	
0170107320	1	1	Z1230	Example Item - One		02/20/2017	35.0000	EA	50.00000	1750.00	
0170108027	1	1	Z1230	Example Item - One		03/22/2017	2.0000	EA	1.45000	2.90	

Click icon to view all columns

Personalize Option

- The Personalize option allows Grid Customization.
- This will allow re-organizing how the data displays (ie: move more important data to the front, hide data if necessary and freeze data to always be in the same spot). Follow instructions shown in the Personalize Column and Sort Order.
- Any customization specifications will be specific to your account and not affect any other users.

Grid Customization

Purchase Order List

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button.
Frozen columns display under every tab.

Column Order

- Tab PO Details (frozen)
- Purchase Order (frozen)
- Status
- Last Dispatched Date/Time
- Lines
- Total Amount
- Currency Code
- Acknowledge Status (column 19)
- (column 21)
- Tab Header Details
- PO Business Unit
- Purchase Order Date
- Buyer Name
- Payment Terms

Hidden
 Frozen

Sort Order

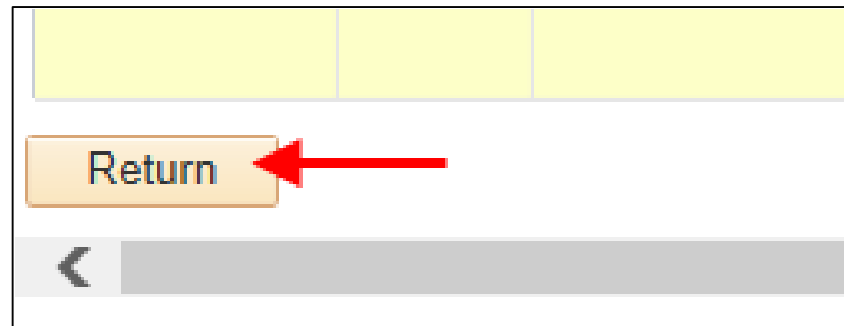
- Lines
- Purchase Order

Descending

OK Cancel Preview [Copy Settings](#) [Share Settings](#) [Delete Settings](#)

Downloaded Purchase Orders

- When finished with the download PO's, scroll to the bottom of the list and on the lower left hand side, click the Return button to go back to the previous screen listing the Purchase Orders.



For Assistance with Review Purchase Orders:

Email ExpenseSSI@lowes.com

or

Call our Finance Resource Center at 336-658-2121,
select option 3 for LowesLink® then
select option 3 for Spend Management (Expense SSI)