



Lowe's Spend Management Reference Guide

November 3, 2009

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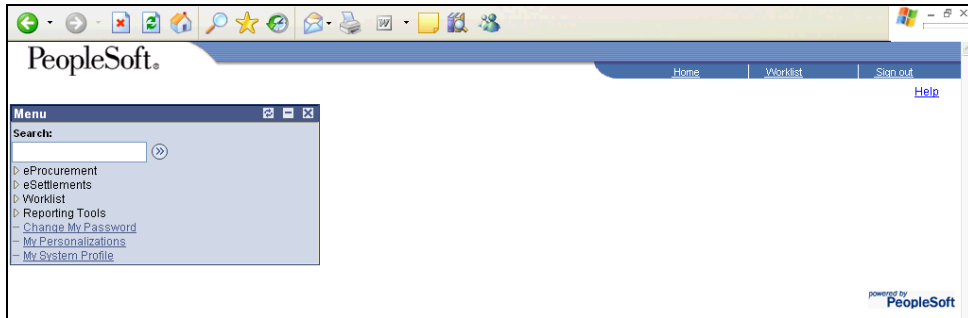
Best Practice Tips


- A. Always communicate with your Lowe's buyer prior to submitting anything to Lowe's.
- B. Be sure you and your Lowe's buyer are in constant communication to avoid confusion and delay in payment.
- C. If you are unsure of how to use any part of the tool, stop and call your Lowe's buyer or Procurement Support (336-658-4180).
- D. Before submitting an invoice on a Change Order, check with your Lowe's buyer. This will help eliminate duplicate orders.
- E. Always check LowesLink® for Vendor Bulletins containing important information.
- F. Download and read the Vendor FAQ's on LowesLink®.
- G. Credits cannot be accepted through the Spend Management system. Work with your Lowe's buyer outside this site to handle ALL credits.
- H. If you experience any performance or technical issues while using this site, please contact Procurement Support (336-658-4180) or your Lowe's buyer immediately.

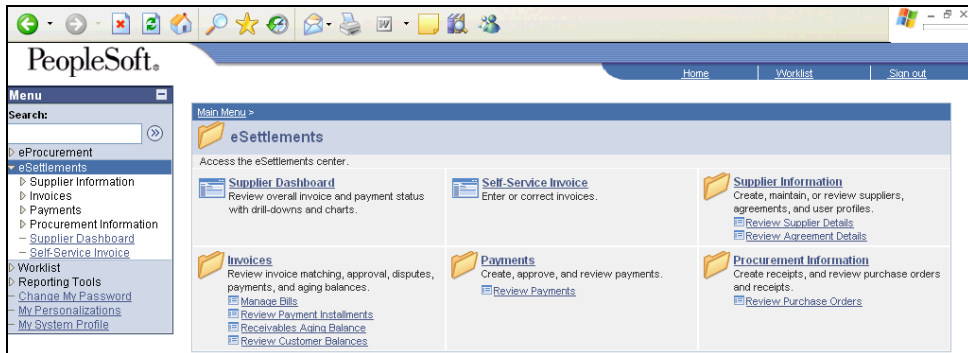
How to Review and Accept Agreement


Procedure

Vendor must accept agreement to be able to view purchase orders and submit invoices. Agreement only has to be accepted once per vendor.

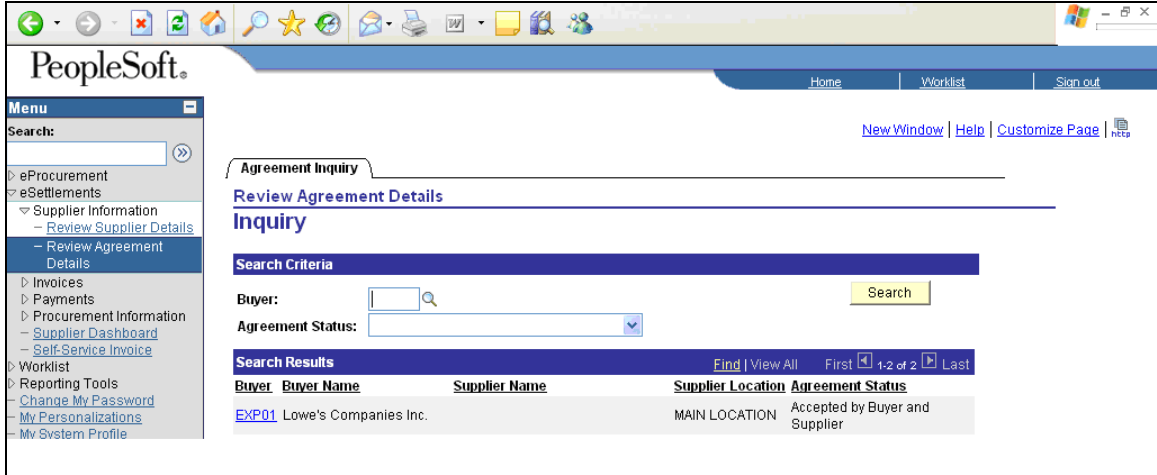


Step	Action
1	Click the eSettlements link. 

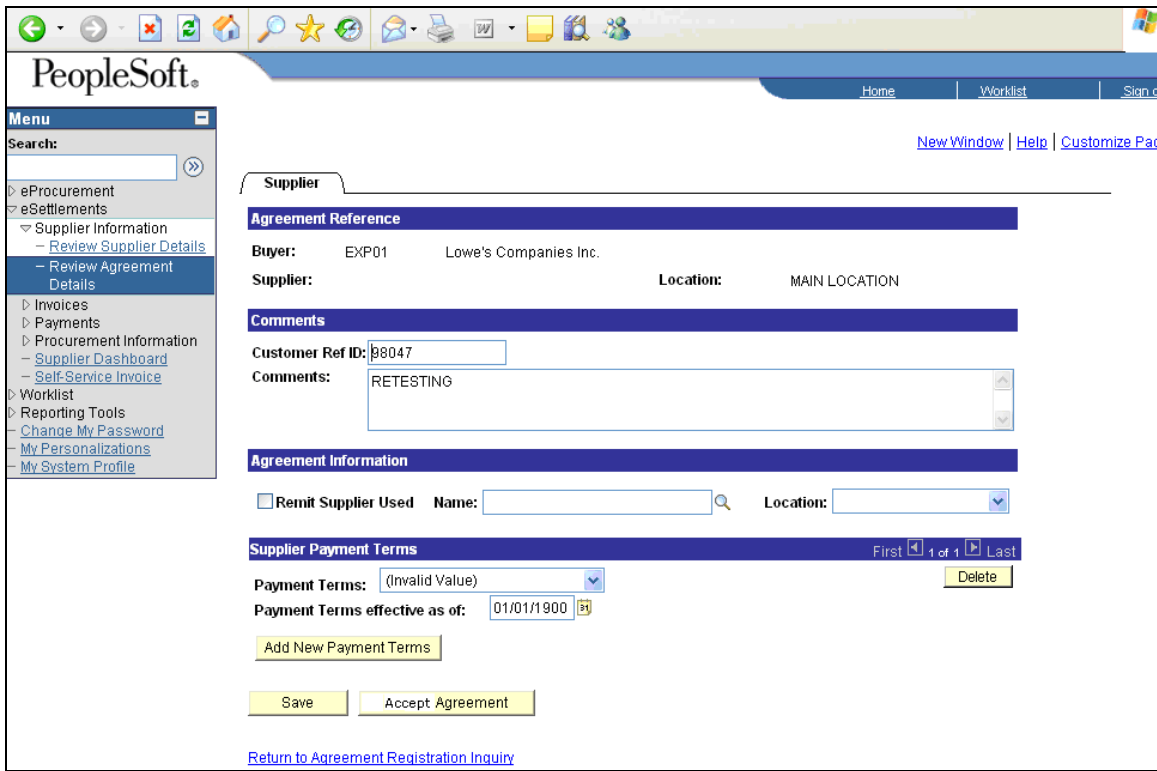


Step	Action
2	Click the Review Agreement Details button. 

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Step	Action
3	Click the Buyer link. EXP01



Step	Action
4	Review the agreement. If this is the first time you have reviewed the agreement, click the Accept Agreement button. Click the Return to Agreement Registration Inquiry link. Return to Agreement Registration Inquiry

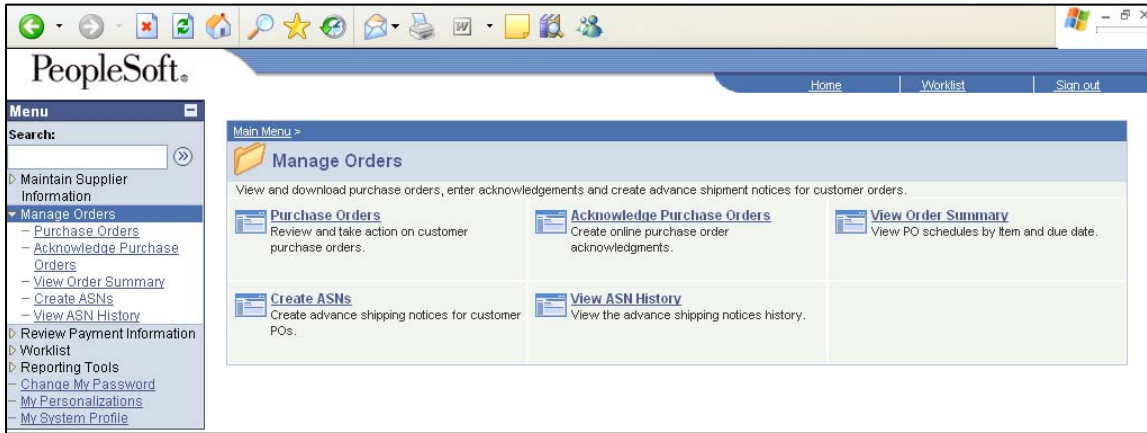
How to View PO Status



Procedure

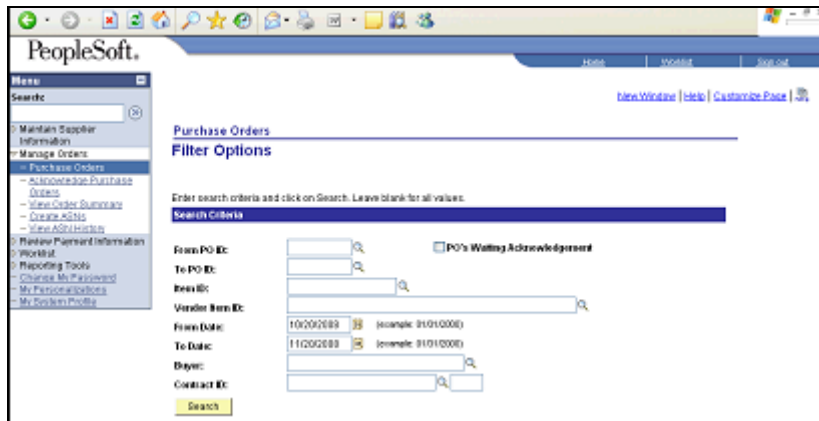
In this topic you will learn how to view the status of a purchase order (PO).

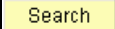
Information Required:

- Optional: PO number, item number, buyer name, contract ID, and date range

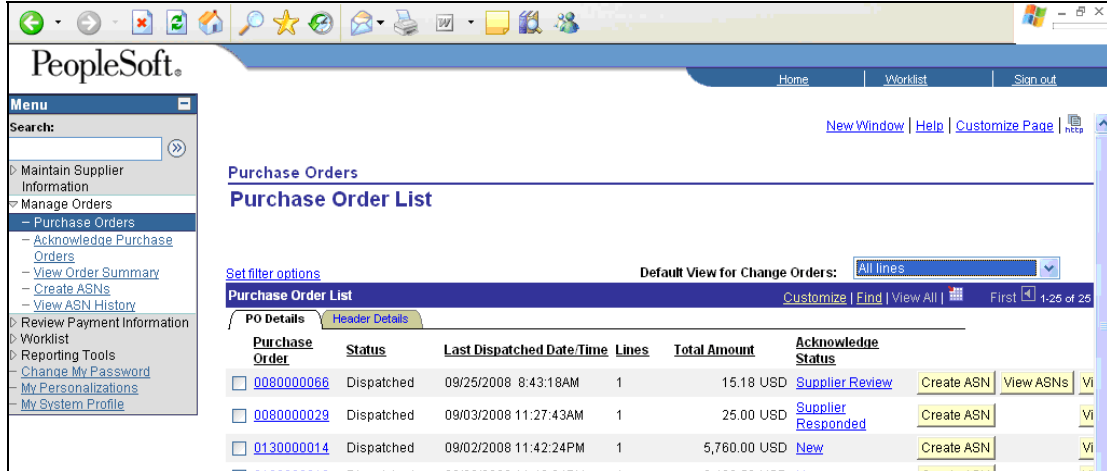


Step	Action
1.	Click the Manage Orders link. 
2.	Click the Purchase Orders link. 

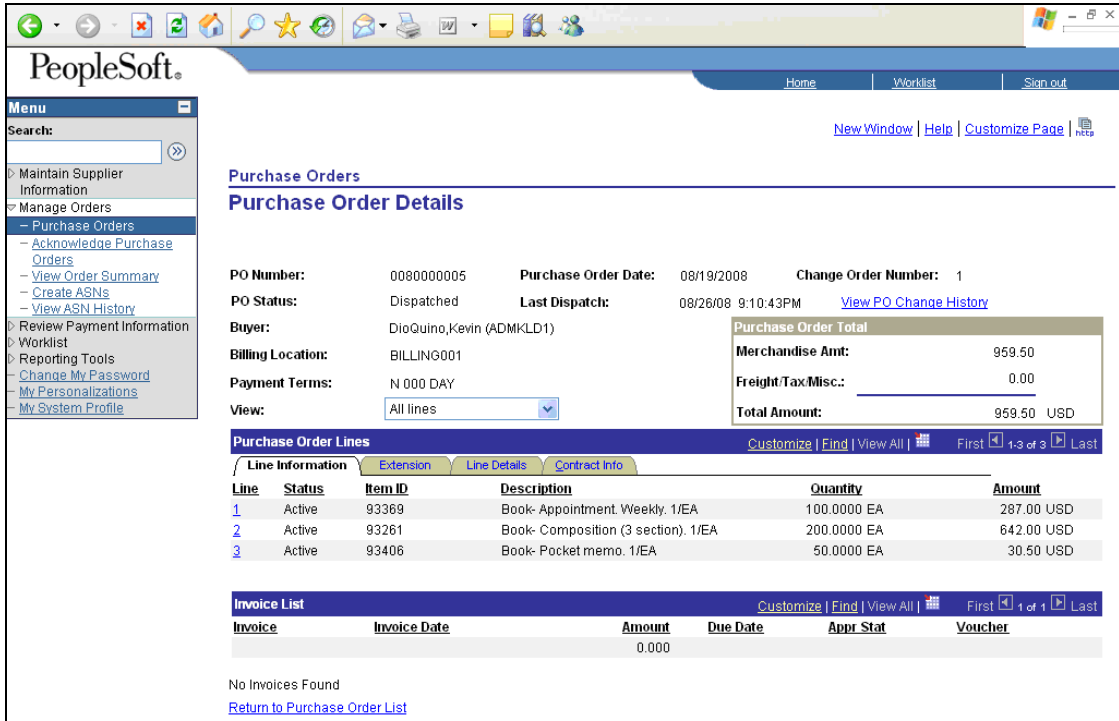


Step	Action
3.	Enter any known search criteria to limit the results shown. You can enter a PO number range in the From PO ID and To PO ID fields, an item number, date range using the From Date and To Date fields, buyer name, or contract ID. Most search fields include a look up functionality (magnifying glass). Click the look up icon to view the possible values for the select field. Click the Search button. 

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Step	Action
4.	To view the details of a PO, click the Purchase Order number hyperlink. Click the PO Number link. 0080000005
5.	Note: Click the View PDF button to view a generated copy of the PO. View PDF



Step	Action
6.	The Purchase Order Details screen will display. Click the Return to Purchase Order List link to return to the previous page. Return to Purchase Order List

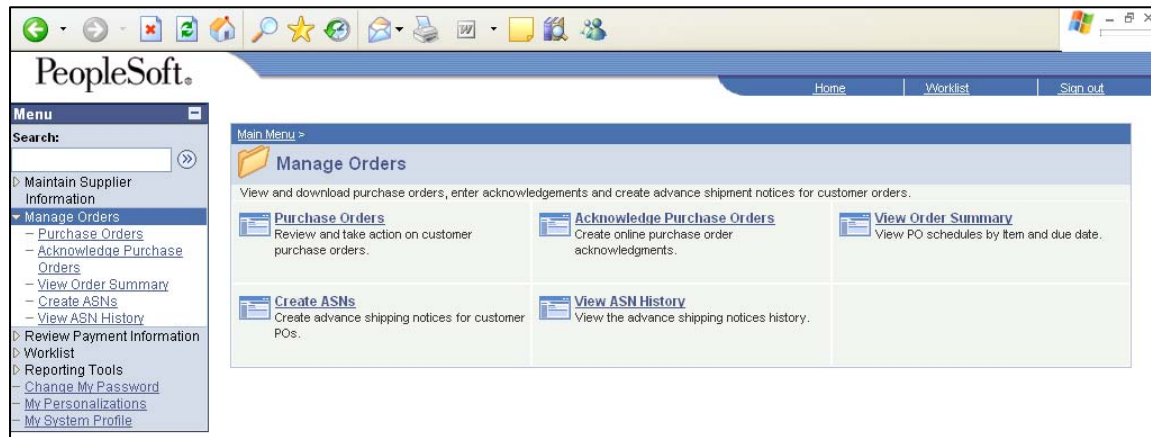
How to Create a PO Acknowledgement

Procedure

In this topic you will learn how to create a purchase order (PO) acknowledgement. PO acknowledgements (POA) are a way to electronically notify the Lowe's buyer of discrepancies or changes to the price, quantity, or delivery date. Note: If you are unsure if a POA is required, contact your Lowe's buyer to discuss.

Information Required:

- None
- Optional: PO number, buyer name, and date range



Step	Action
1.	Click the Manage Orders link. Manage Orders
2.	Click the Acknowledge Purchase Orders link. Acknowledge Purchase Orders

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Acknowledge Purchase Orders
Search/Filter Acknowledgements

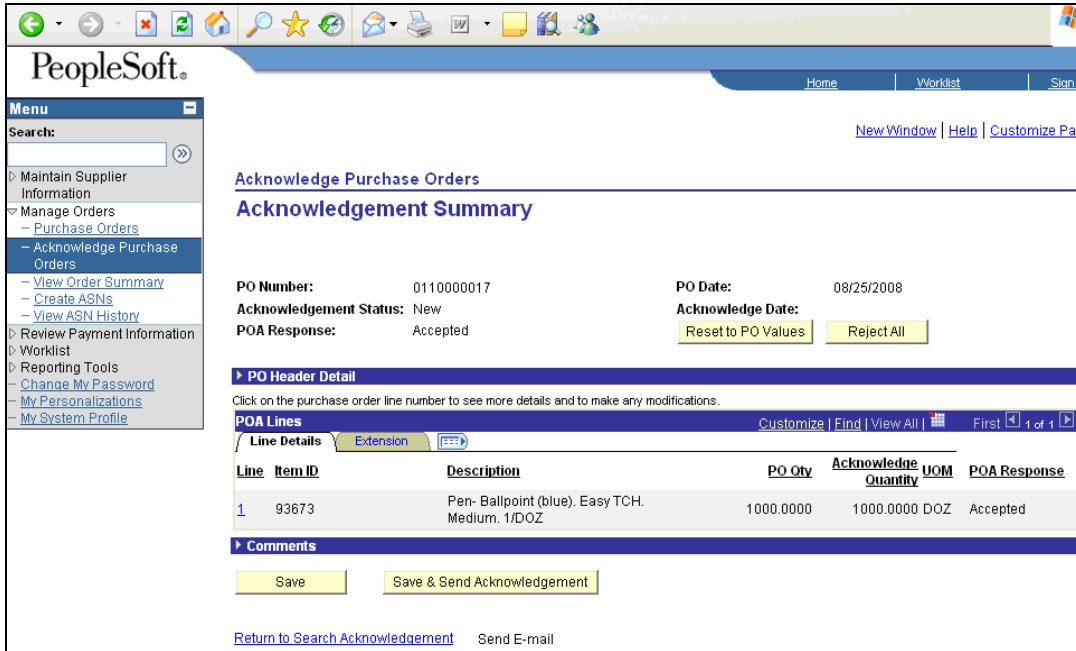
From PO ID: [] To PO ID: []
 From Date: 07/01/2008 To Date: 11/20/2008
 Buyer: []
 Vendor Location: MAIN LOCATION

Current Acknowledgements
 New Supplier Review Supplier Respond/Buyer Accept
 View History

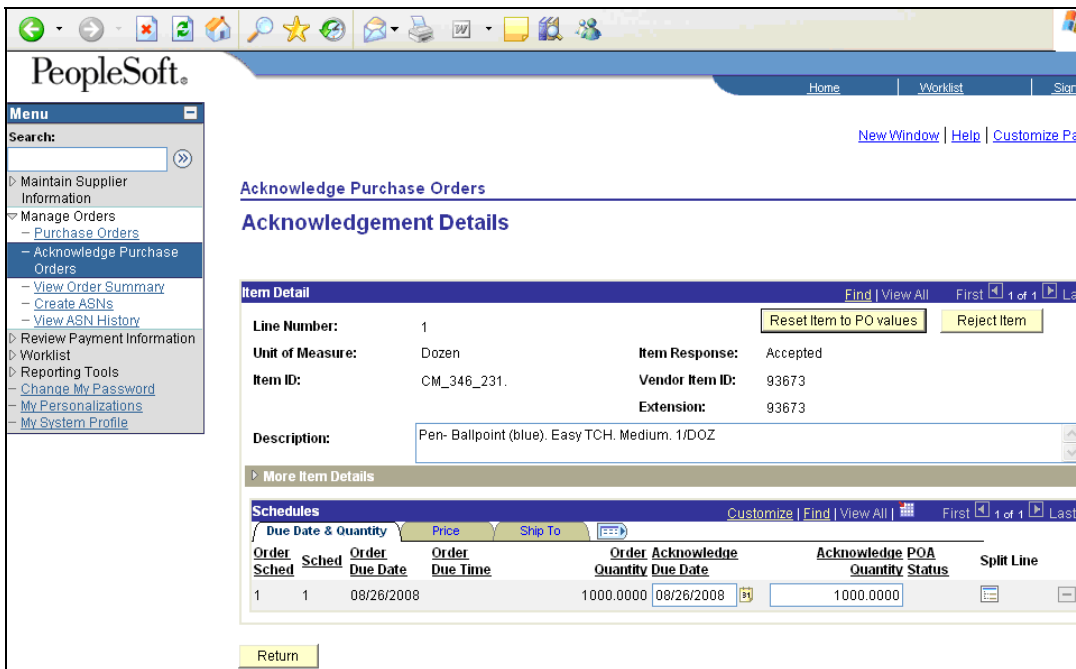
Purchase Order	Dispatched Date/Time	PO Status	Acknowledgement Status	Acknowledgement Date	Source of Acknowledgement	POA Required
0080000066	09/25/2008 8:43:18AM	Dispatched	Supplier Review		Online	
0110000017	09/02/2008 11:42:24PM	Dispatched	New			No
0020000022	09/02/2008 11:42:24PM	Dispatched	New			No
0130000014	09/02/2008 11:42:24PM	Dispatched	New			No
0130000013	09/02/2008 11:42:24PM	Dispatched	New			No
0110000016	09/02/2008 11:42:24PM	Dispatched	New			No
0080000021	08/27/2008 2:19:26PM	Dispatched	New			No
0070000019	08/27/2008 2:19:26PM	Dispatched	Supplier Review		Online	
0070000020	08/27/2008 2:19:26PM	Dispatched	New			No
0080000005	08/26/2008 9:10:43PM	Change Order -1	New			No
0070000004	08/26/2008 9:10:43PM	Dispatched	New			No

Step	Action
3.	Enter any known search criteria to limit the results shown. You can enter a PO number range in the From PO ID and To PO ID fields, date range using the From Date and To Date fields, buyer name, or vendor location. Most search fields include a look up functionality (magnifying glass). Click the look up icon to view the possible values for the select field.
4.	Click the Search button. <input type="button" value="Search"/>
5.	Click the purchase order number hyperlink to view the PO Acknowledgement Summary page. Click the PO number link. 0110000017

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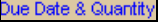

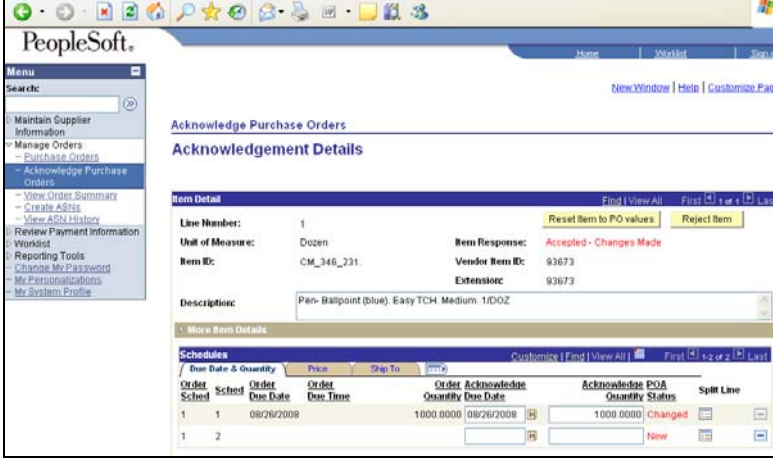
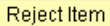

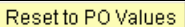
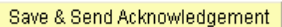
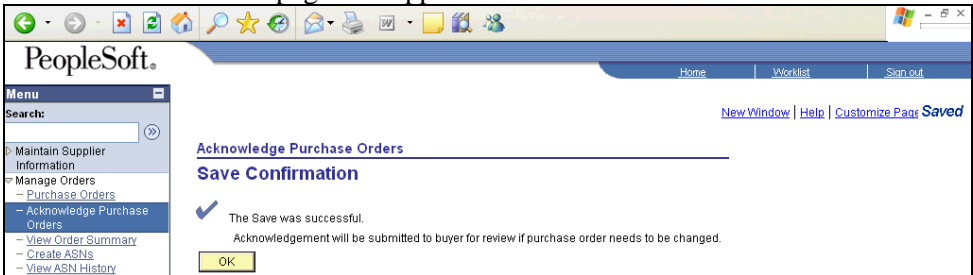



Step	Action
6.	Click the Line number to view additional details and to make any modifications. Click the Line Number link. 1



Step	Action
7.	Review the information on the Due Date and Quantity page.
8.	Click the Price tab. Price Review the information on the Price page.

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Step	Action
9.	Click the Ship To tab.  Review the information on the Ship To page.
10.	Click the Due Date & Quantity tab.  You can suggest changes to prices, quantities, shipping methods, or delivery dates by entering data in the editable fields.
11.	You can indicate backorder schedules and suggest splitting lines if needed. Click the Split Line button.  A new line will appear. Enter the information for the split line. 
12.	You can reject an item on the PO by clicking the Reject Item button.  The Item Response will change to Rejected With Detail , and the POA Status will change to Canceled .
13.	Click the Return button. 
14.	If you want to reverse any changes made to the PO, you can reset the PO values by clicking the Reset to PO Values button. 
15.	You can save the POA in progress and submit it later by clicking Save , or you can choose to click Save and Send Acknowledgement to submit the POA for buyer approval. 
16.	A Save Confirmation page will appear.  Click the OK button. 

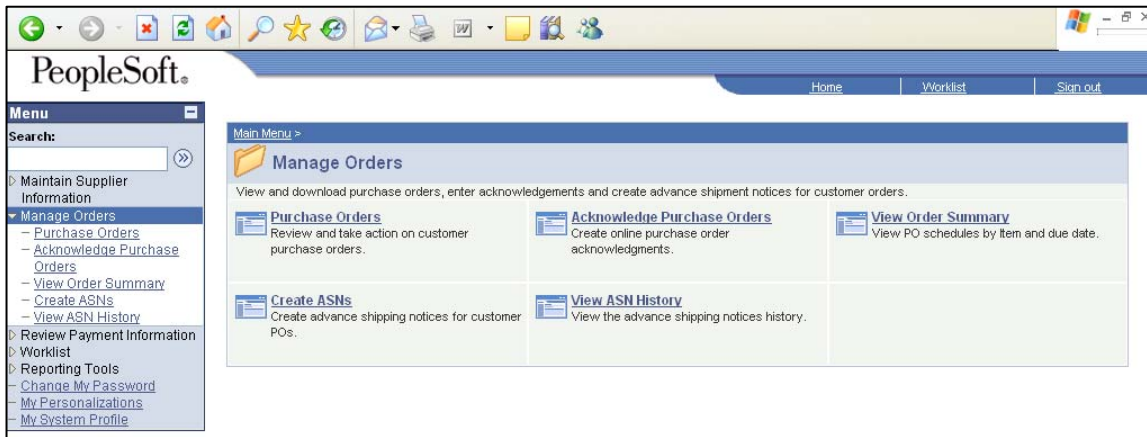
How to Create an ASN

Procedure

In this topic you will learn how to create advanced shipment notices (ASN). Note: If you are unsure if an ASN is required, contact your Lowe's buyer to discuss.

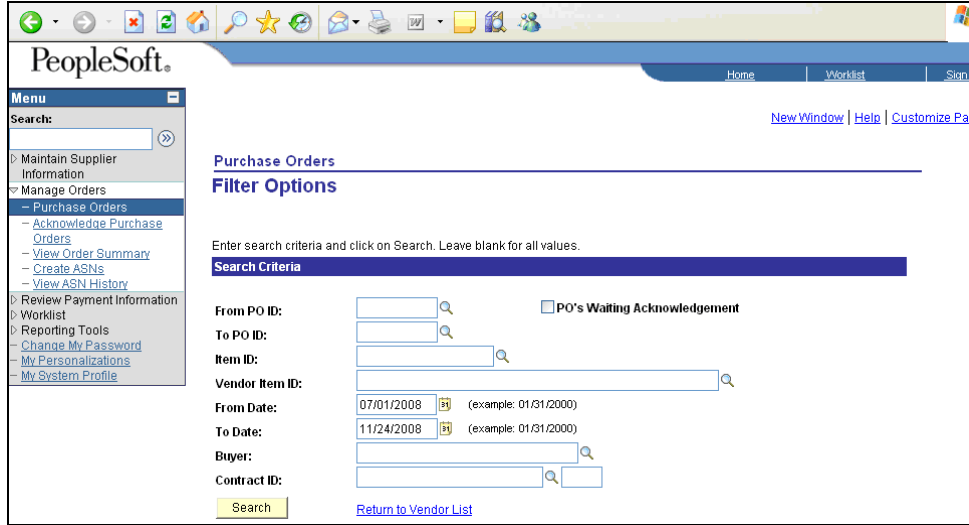
Information Required:


- Shipment number
- Bill of Lading
- Purchase order number
- Invoice number
- Carrier information
- Shipping information (items, quantity, ship date, expected delivery date)

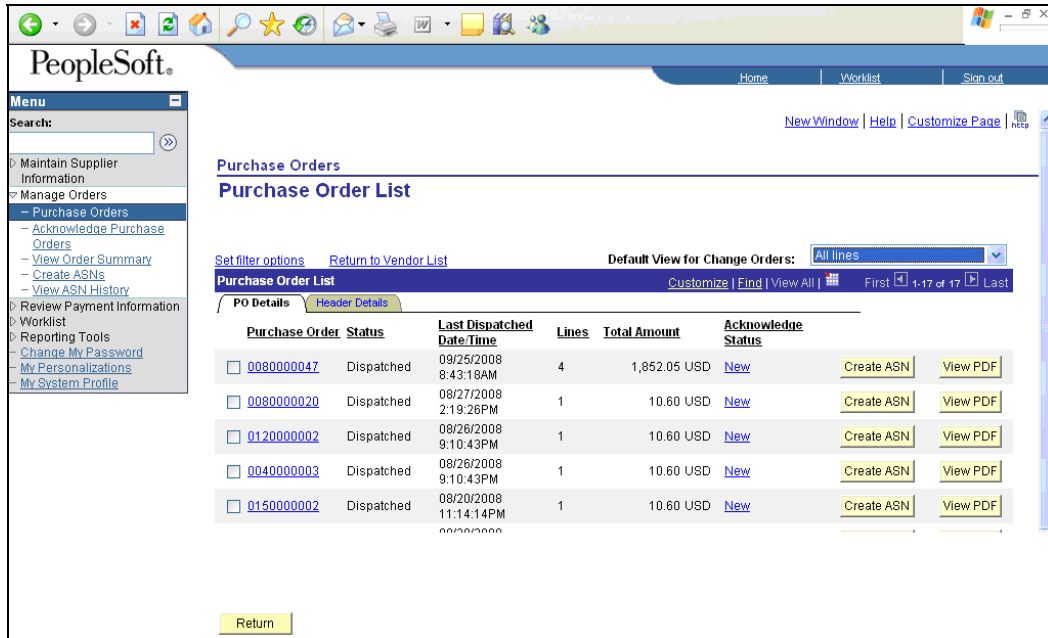



Step	Action
1.	Click the Manage Orders link. Manage Orders
2.	Click the Purchase Orders link. Purchase Orders
3.	Note: If you have access to multiple vendor numbers, select the appropriate vendor name. Click the Vendor Name link.

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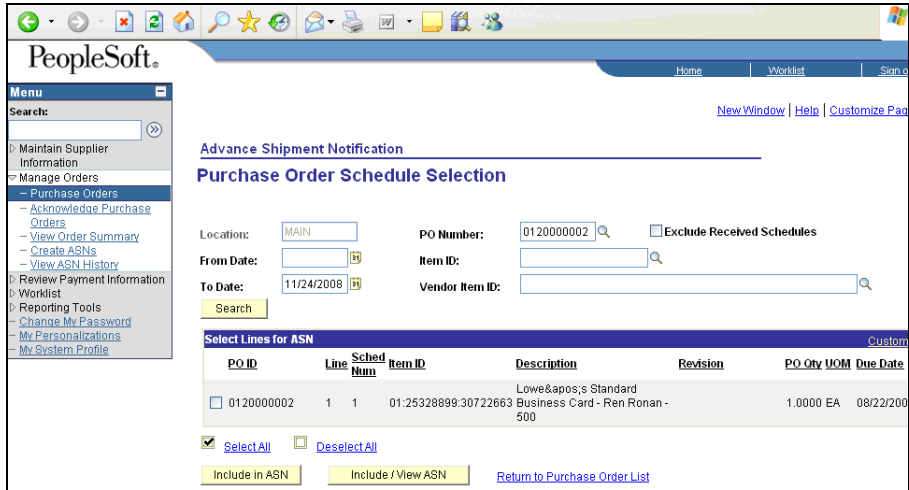


Step	Action
4.	Enter any known search criteria to limit the results shown. You can enter a purchase order (PO) number range in the From PO ID and To PO ID fields, item ID numbers, date range using the From Date and To Date fields, buyer name, or Contract ID . Most search fields include a look up functionality (magnifying glass). Click the look up icon to view the possible values for the select field.
5.	Click the Search button. 

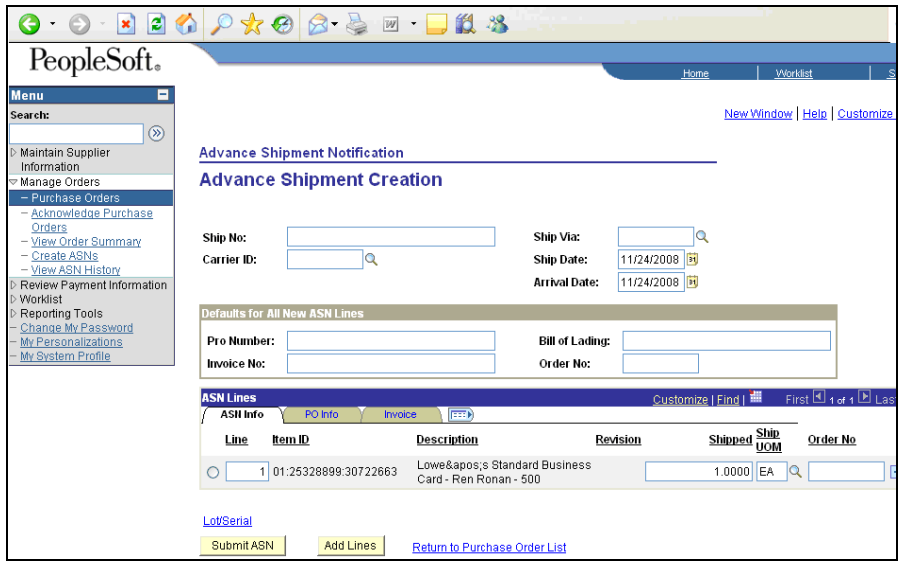


Step	Action
6.	A list of dispatched PO is shown. Click the Create ASN button. 

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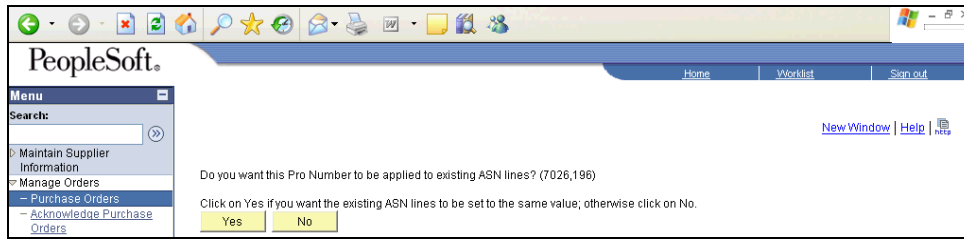


Step	Action
7.	Click the PO ID option (checkbox to the left of the PO ID). <input type="checkbox"/>
8.	Click the Include / View ASN button. <input type="button" value="Include / View ASN"/>



Step	Action
9.	Click in the Ship No field and enter the desired information into the field.
10.	Make any necessary changes to the Ship Date and Arrival Date .
11.	Click in the Pro Number field and enter the desired information into the field.
12.	Click in the Bill of Lading field and enter the desired information into the field.
13.	Click in the Invoice No field and enter the desired information into the field.
14.	Click in the Order No field and enter the desired information into the field.
15.	Click the Line option (radio button to the left of the line number). <input type="radio"/>
16.	Click the Submit ASN button. <input type="button" value="Submit ASN"/>

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Step	Action
17.	Do you want this Pro Number to be applied to existing ASN lines? Click the Yes button. <input type="button" value="Yes"/>
18.	Do you want this Bill of Lading to be applied to existing ASN lines? Click the Yes button. <input type="button" value="Yes"/>
19.	Do you want this Invoice Number to be applied to existing ASN lines? Click the Yes button. <input type="button" value="Yes"/>
20.	Do you want this Order Number to be applied to existing ASN lines? Click the Yes button. <input type="button" value="Yes"/>
21.	You'll see the Save Confirmation page. Click the OK button. <input type="button" value="OK"/>

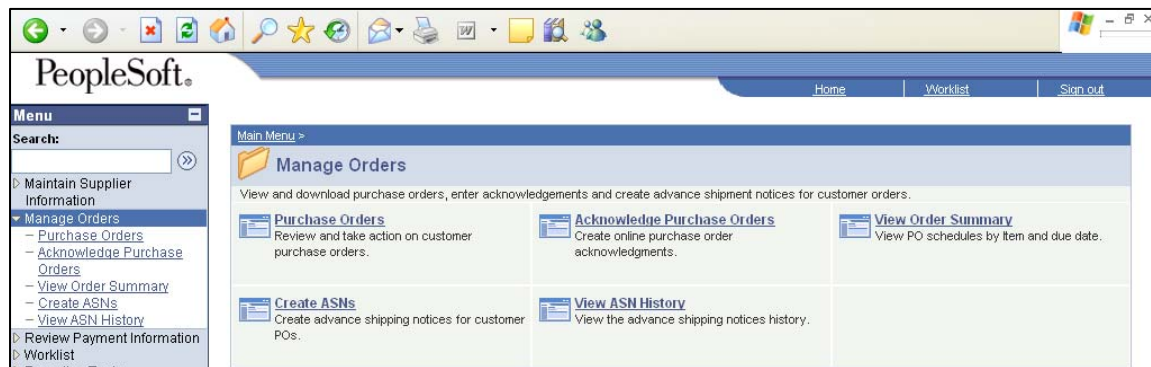
How to View a PO Change Order



Procedure

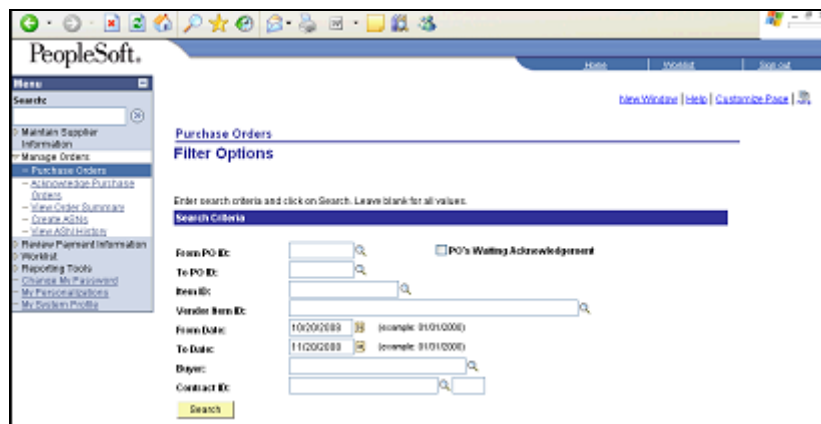
In this topic you will learn how to view a purchase order (PO) change order. When the Lowe's buyer modifies an existing PO, a change order is created and a PO notification email is sent to the vendor. Note: If you are unsure whether to submit a new invoice due to the change order, please contact your Lowe's buyer to discuss.

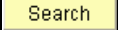
Information Required:

- Optional: PO number, item number, buyer name, contract ID, and date range

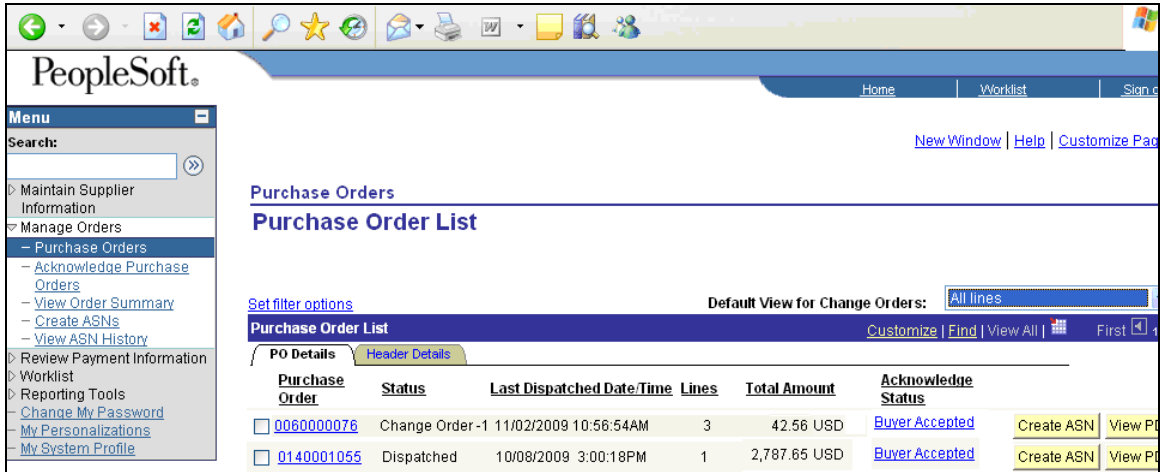


Step	Action
1.	Click the Manage Orders link. 
2.	Click the Purchase Orders link. 

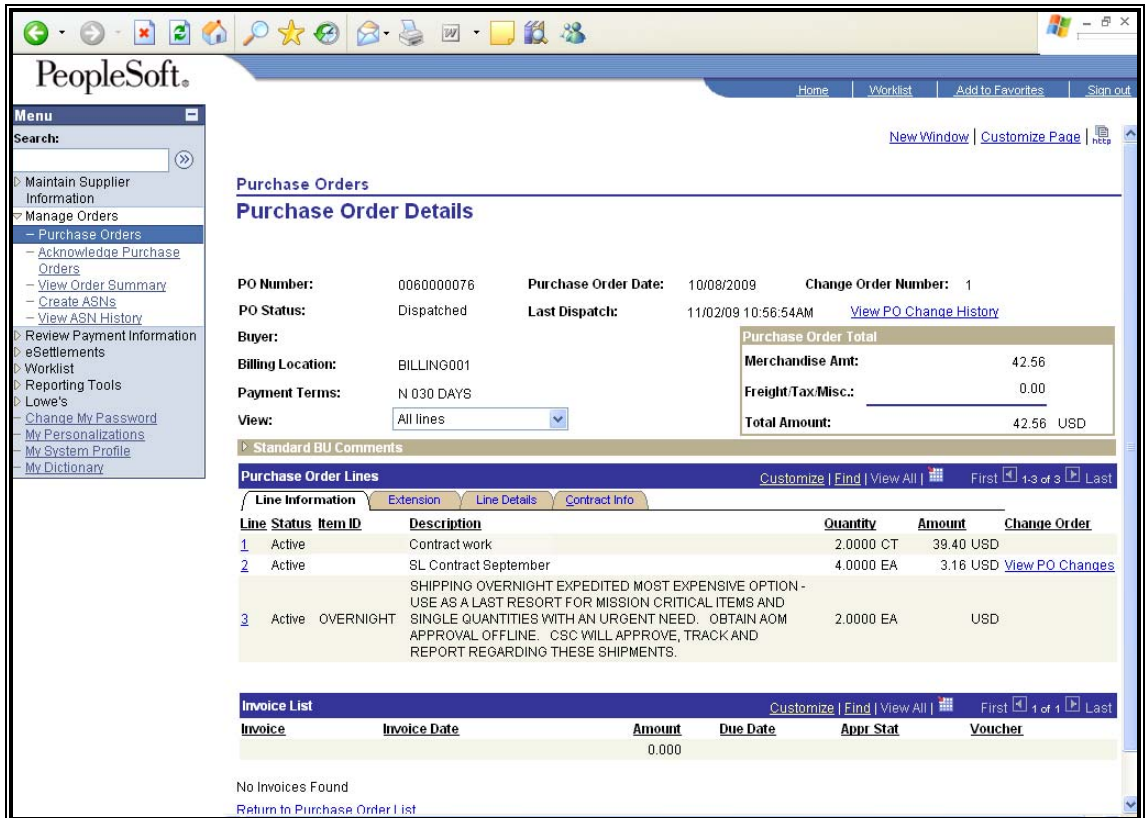


Step	Action
3.	Enter any known search criteria to limit the results shown. You can enter a PO number range in the From PO ID and To PO ID fields, an item number, date range using the From Date and To Date fields, buyer name, or contract ID. Most search fields include a look up functionality (magnifying glass). Click the look up icon to view the possible values for the select field. Click the Search button. 

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Step	Action
4.	A list of purchase orders is displayed. Review the PO Status . If the PO has been modified by the Lowe's buyer, the status will show Change Order -1 . Click the PO number hyperlink to view the PO.



Step	Action
5.	Click the View PO Changes link to view the modifications to the PO.

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PO Changes - Details

This page shows the differences between the prior PO and this PO revision. For new or canceled lines/schedules only one row will appear stating "New" or "Canceled" for that line/schedule, since there is nothing to compare too. For all other changes, the prior value and new value are displayed for each field that changed.

Line Details Find | View All First 1 of 1 Last

Line Number: 2 **Change Order Number:** 1

Item ID:
SL Contract September

Schedule Changes Find | View All First 1 of 1 Last

Schedule	Value Changed	Prior Value	New Value
1	Due Date	10/14/2009	10/20/2009

Return

Step	Action
6.	The changes to the PO will be listed, and the Prior Value and the New Value will be displayed.

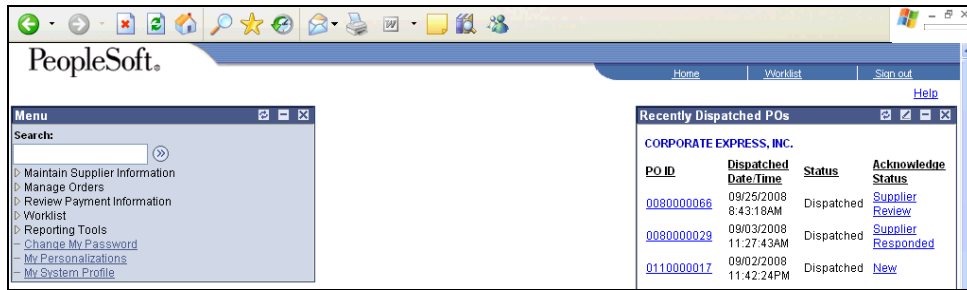
How to Change Addresses and Contacts



Procedure

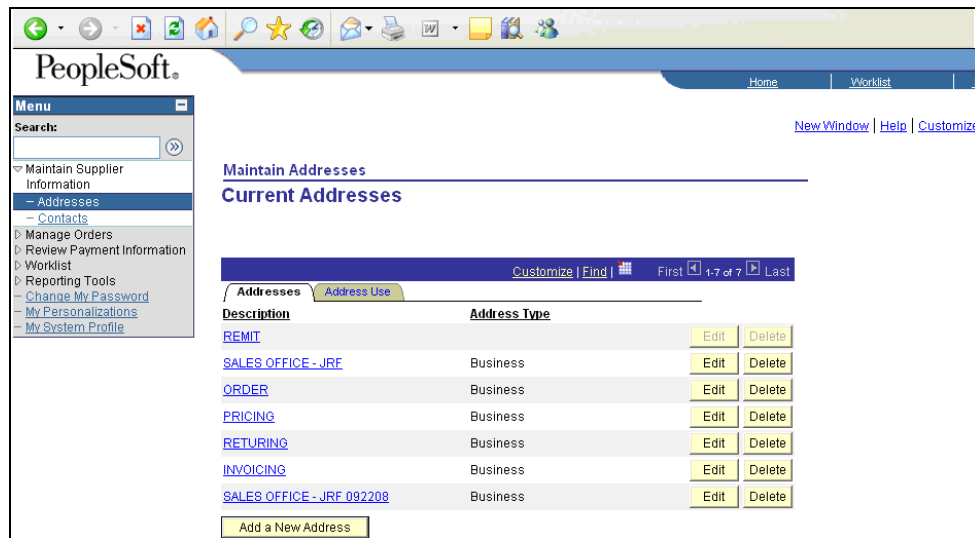
In this topic you will learn how to view, add, or maintain vendor information such as addresses and contact information. The remit address cannot be changed from this page. Please contact your Lowe's representative for procedure to change the remit address.


Information Required:

- None

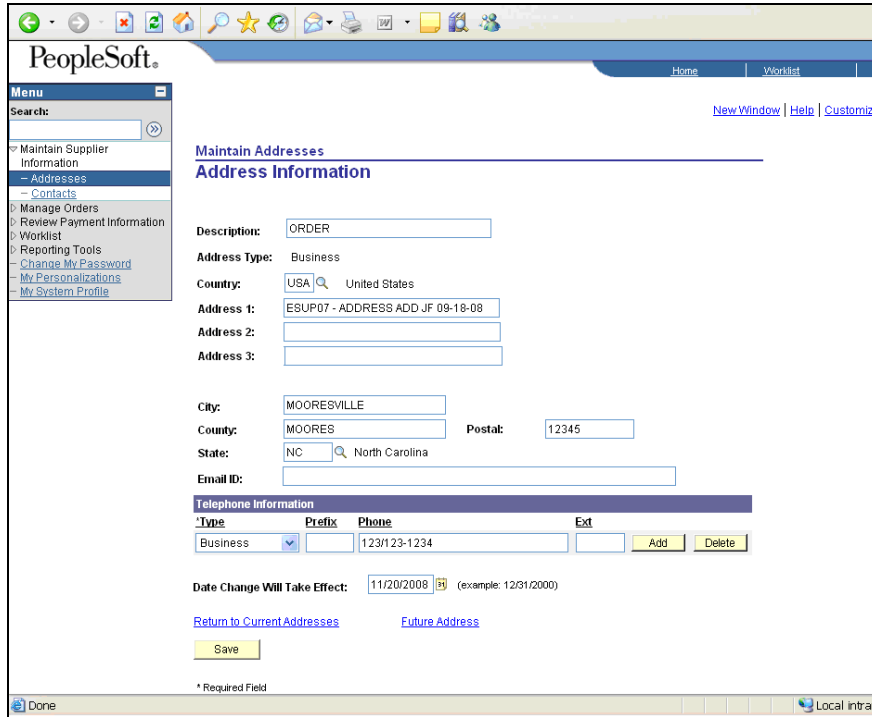



Step	Action
1.	Click the Maintain Supplier Information link. 
2.	Choose to update either an address or contact information. In this example, we will review the addresses first. Click the Addresses link. 

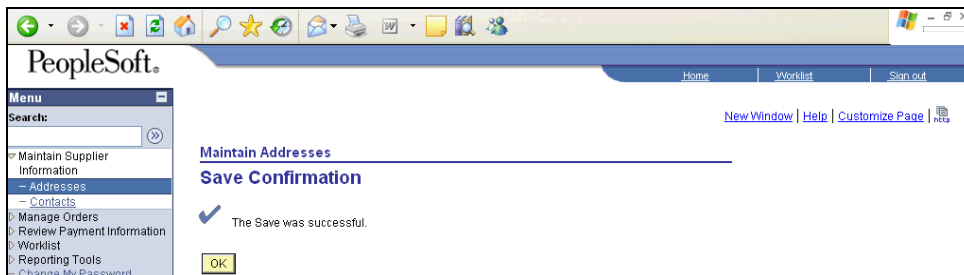



Step	Action
3.	From this page, you can edit existing addresses or choose to add a new address. In this example, we will edit an existing address. Click the Edit button. 

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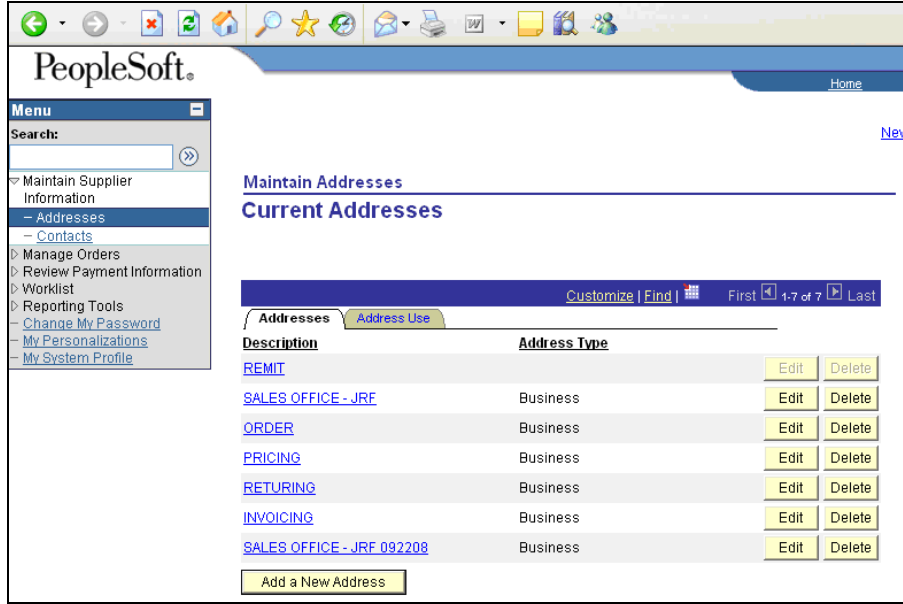


Step	Action
4.	Make any necessary edits. Click the Save button. 



Step	Action
5.	A save confirmation page will appear. Click the OK button. 

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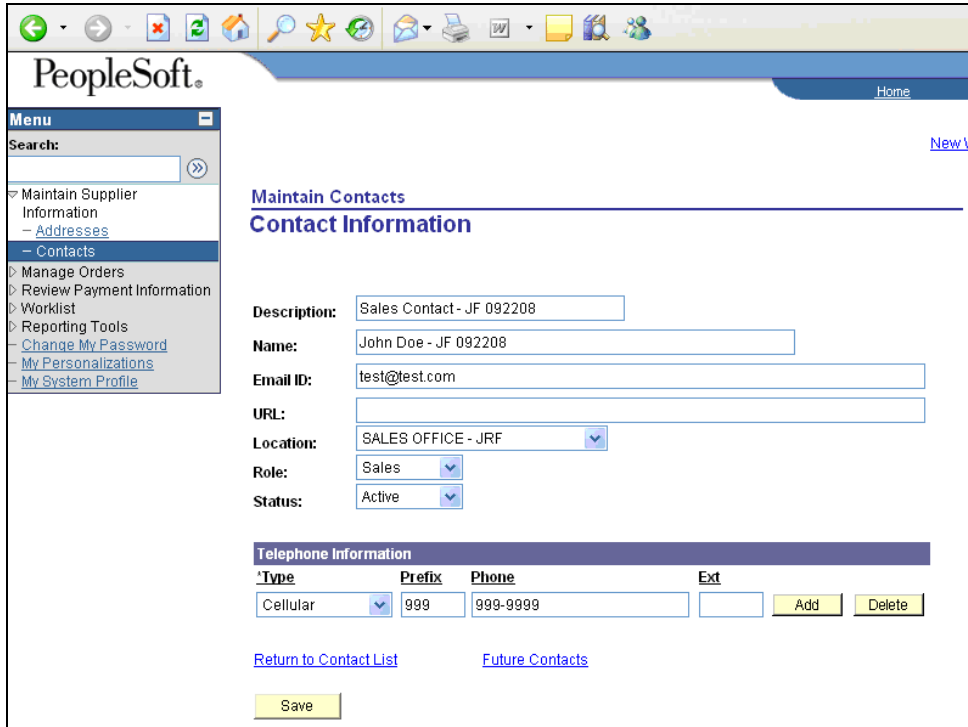


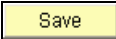
Step	Action
6.	Next, let's view the Contacts. Click the Contacts link. Contacts

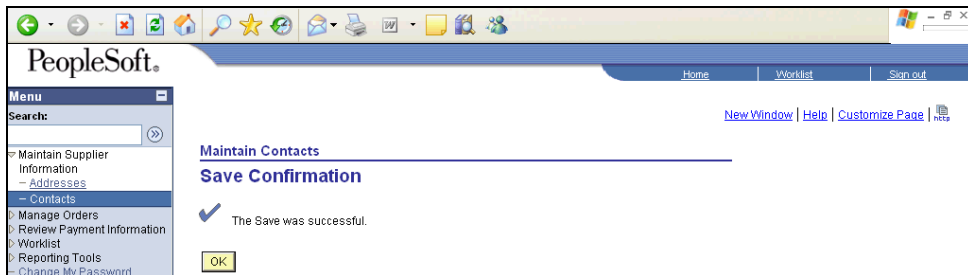


Step	Action
7.	From this page, you can edit an existing contact or choose to add a new contact. In this example, we will edit existing contact information. Click the Edit button. Edit

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Step	Action
8.	Make any necessary changes. Click the Save button. 



Step	Action
9.	A save confirmation page appears. Click the OK button. 

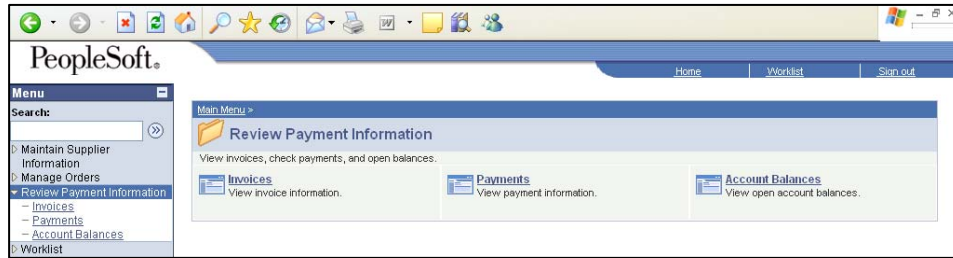
How to Review Invoice, Payment, and Account Balance Info



Procedure

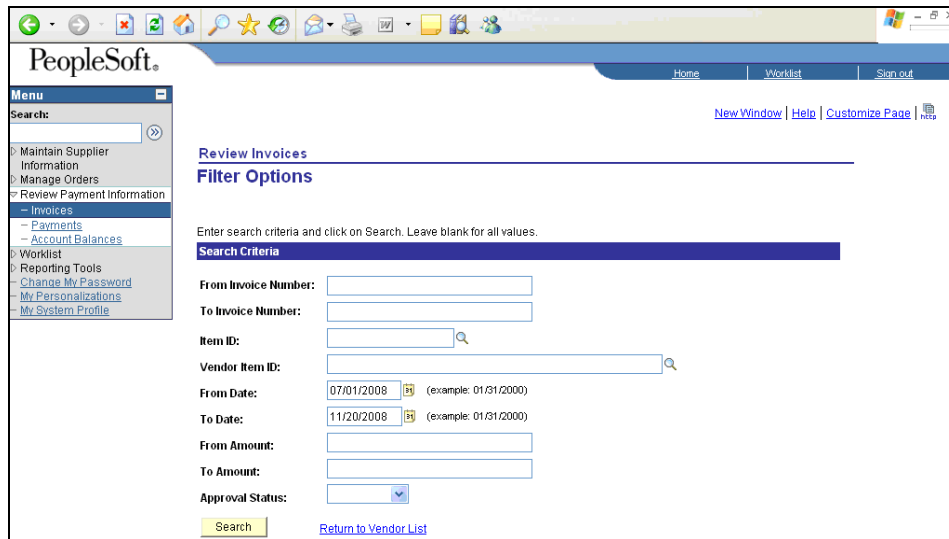
In this topic you will learn how to view invoice, payment, and account balance information. If you have questions about information in this section, please contact your Lowe's buyer or Procurement Support (335-658-4180).


Information Required:

- None

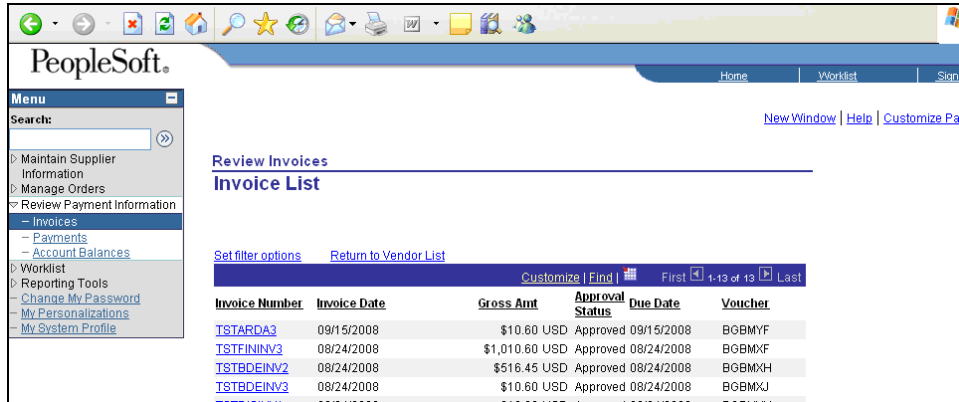


Step	Action
1.	Click the Review Payment Information link. 
2.	First, we will review invoice information. Click the Invoices button. 

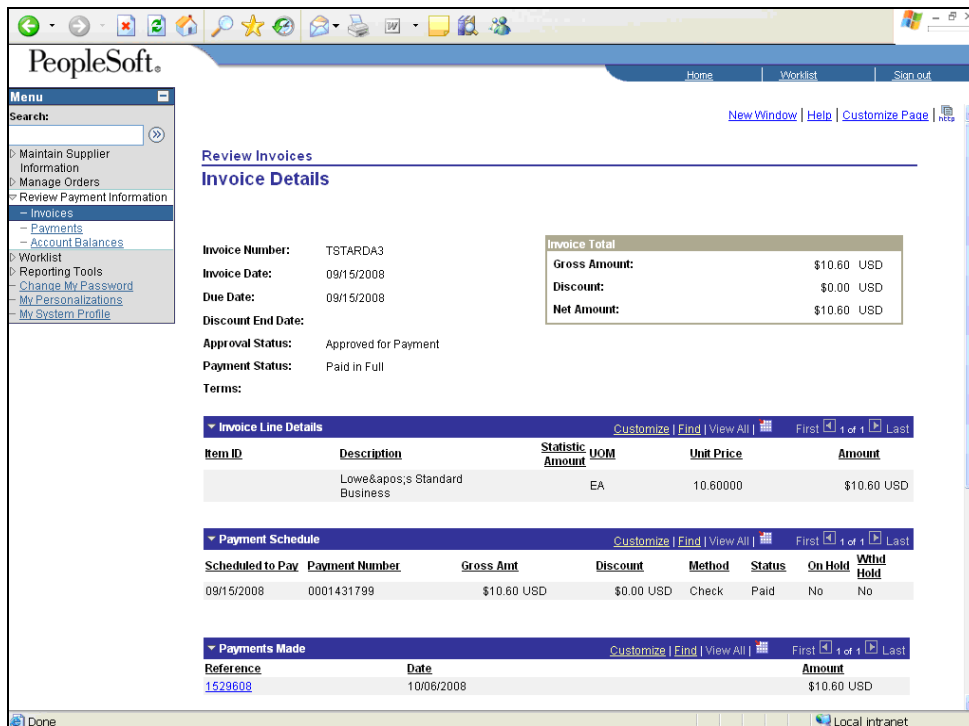


Step	Action
3.	Enter any known search criteria to limit the results shown. You can enter a invoice number range in the From Invoice Number and To Invoice Number fields, an item ID, date range using the From Date and To Date fields, amount range using the From Amount and To Amount fields, or Approval Status . Most search fields include a look up functionality (magnifying glass) which you can click the icon to view the possible values for the select field. Click the Search button. 

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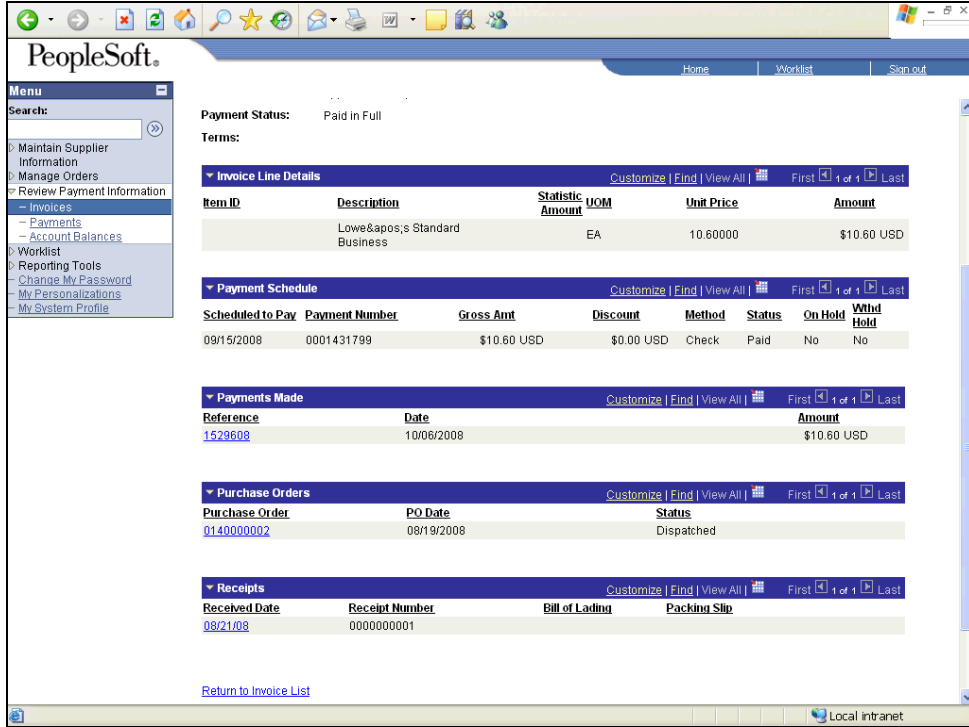



Step	Action
4.	The invoices that matched the search criteria are listed. Click the Invoice Number link. TSTARDA3

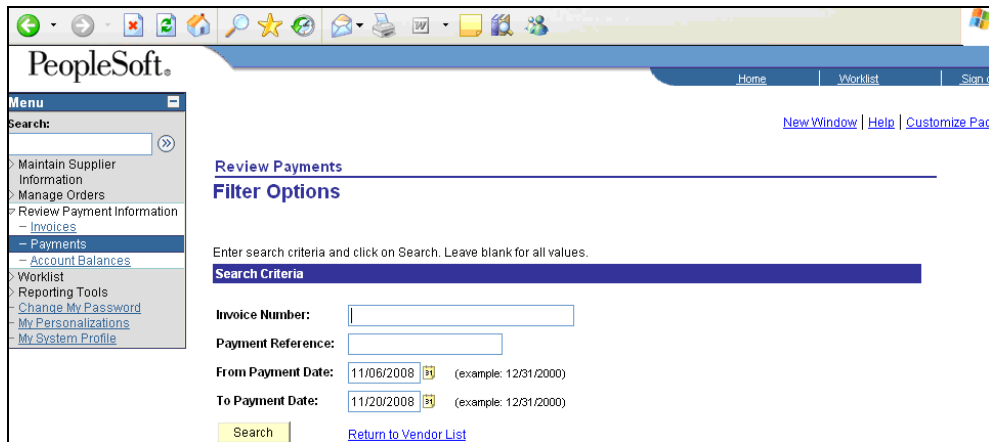



Step	Action
5.	If you scroll down the page, you will see additional information. <ul style="list-style-type: none"> ◆ To view the associated payment information, click the payment Reference number. ◆ To view the associated PO information, click the Purchase Order number. ◆ To view the associated receiving information, click the Received Date.

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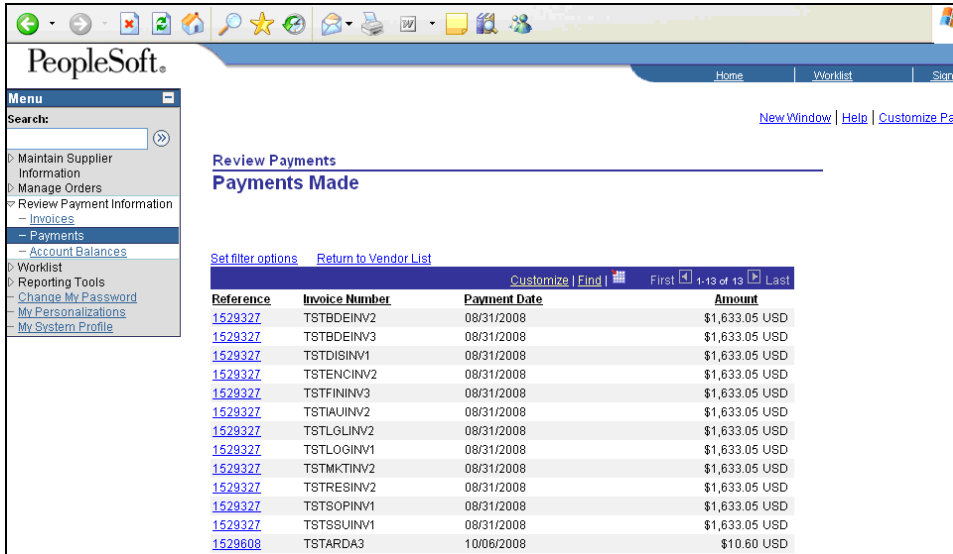


Step	Action
6.	Next, we will review payment information. Click the Payments link. 

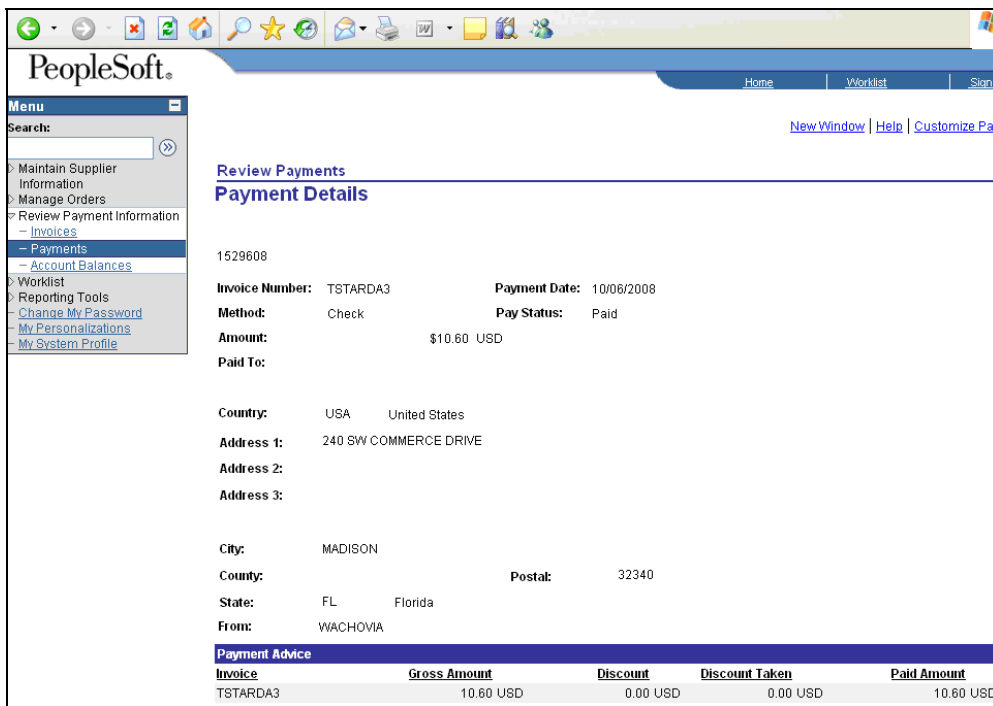


Step	Action
7.	Enter any known search criteria to limit the results shown. You can enter an invoice number, payment reference (check number) number, or payment (check) date range using the From Payment Date and To Payment Date fields. Click the Search button. 

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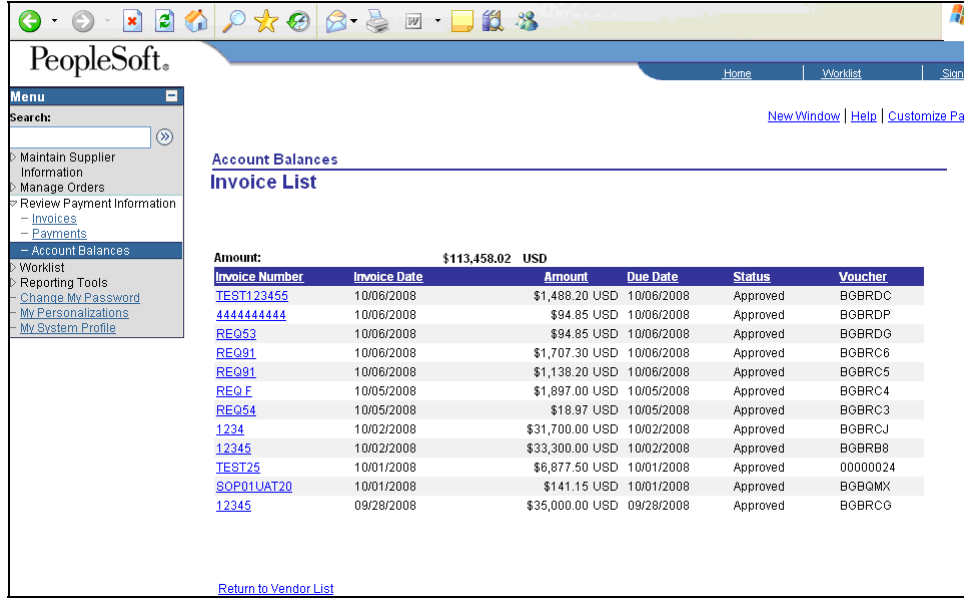


Step	Action
8.	Click the Payment Reference link. 1529608

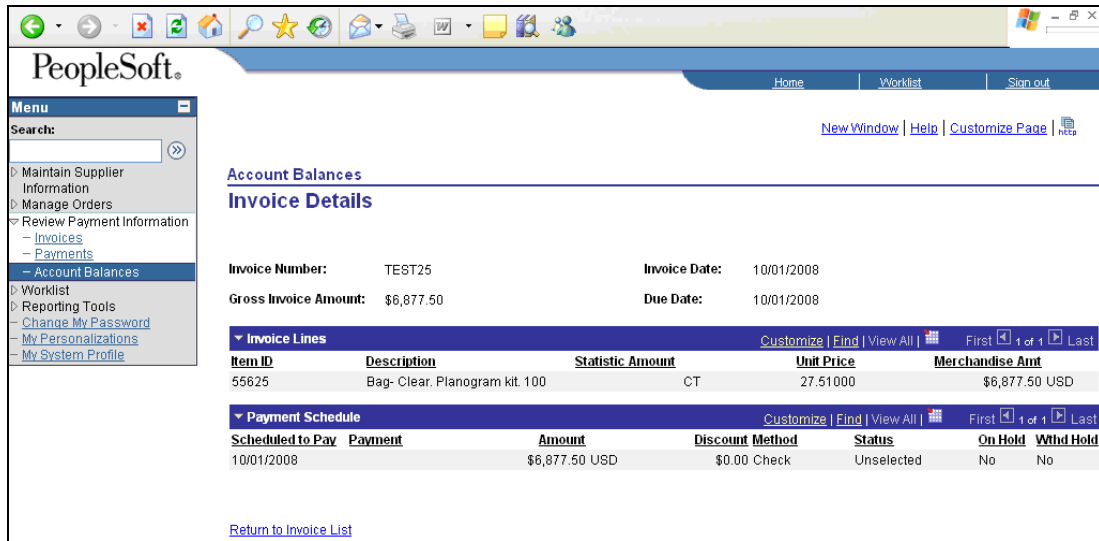


Step	Action
9.	Review the payment details shown.
10.	Next, we will review the account balance information. Click the Account Balances link. Account Balances

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Step	Action
11.	Listed are the invoices set to pay on the due date. The Amount listed at the top is the total amount due to the vendor. To view the invoices listed, click the invoice number. Click the Invoice Number link. TEST25

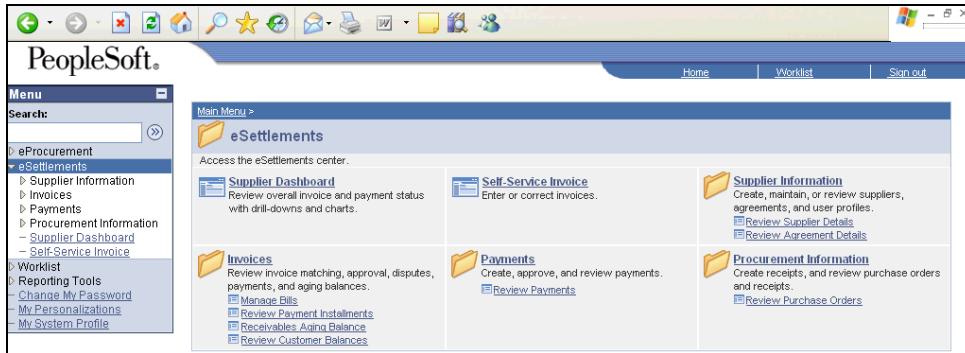




Step	Action
12.	Review the information shown.

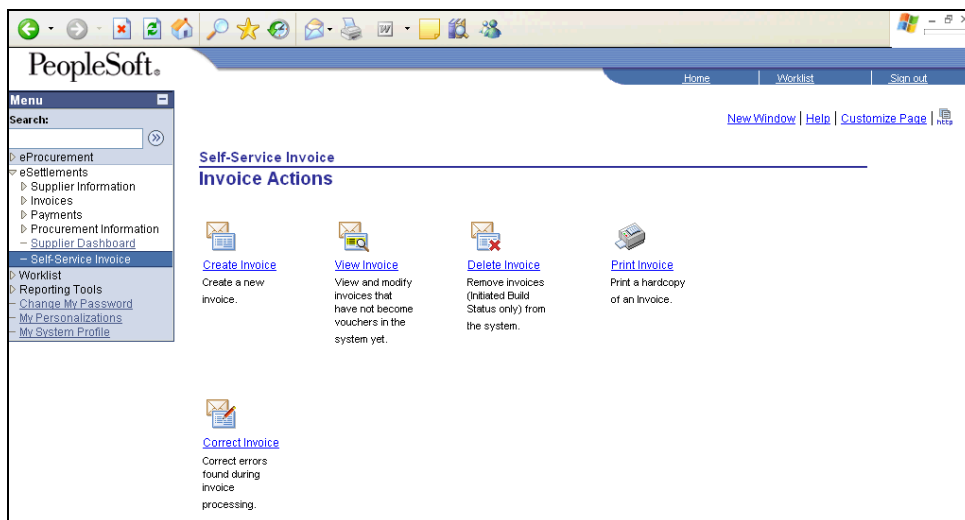
How to Create an Invoice


Procedure

In this topic you will learn how to create and submit an invoice for payment. Note: This system is not designed to accept negative dollar values. Please contact your Lowe's buyer to discuss credit memos processing options. If you have questions about creating or submitting an invoice, please contact your Lowe's buyer or Procurement Support (336-658-4180) prior to submitting.

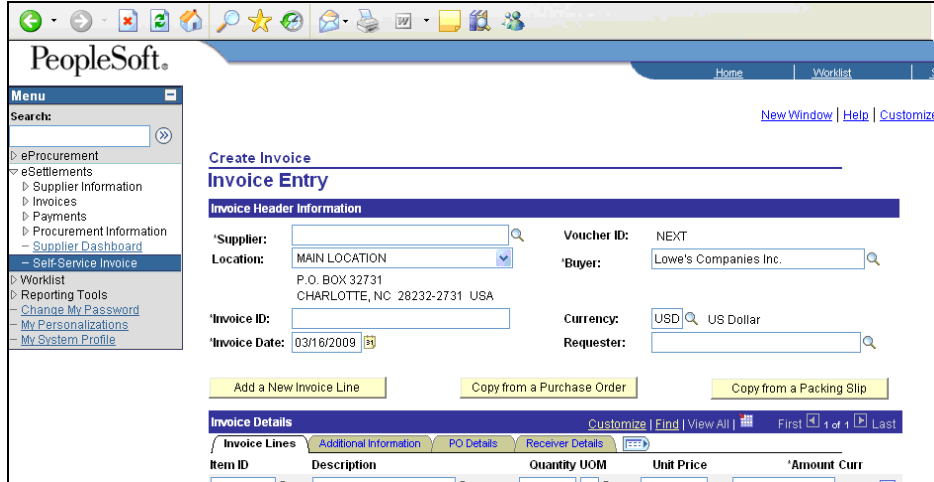


Step	Action
1	Click the eSettlements link. 
2	Click the Self-Service Invoice link. 

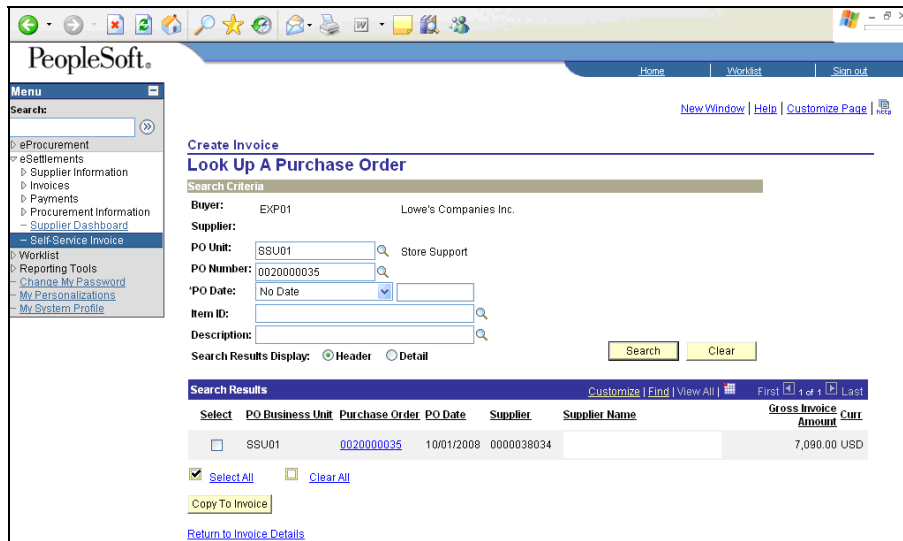


Step	Action
3	Click the Create Invoice button.  Create Invoice

Lowe's Spend Management Vendor Functions Reference Guide

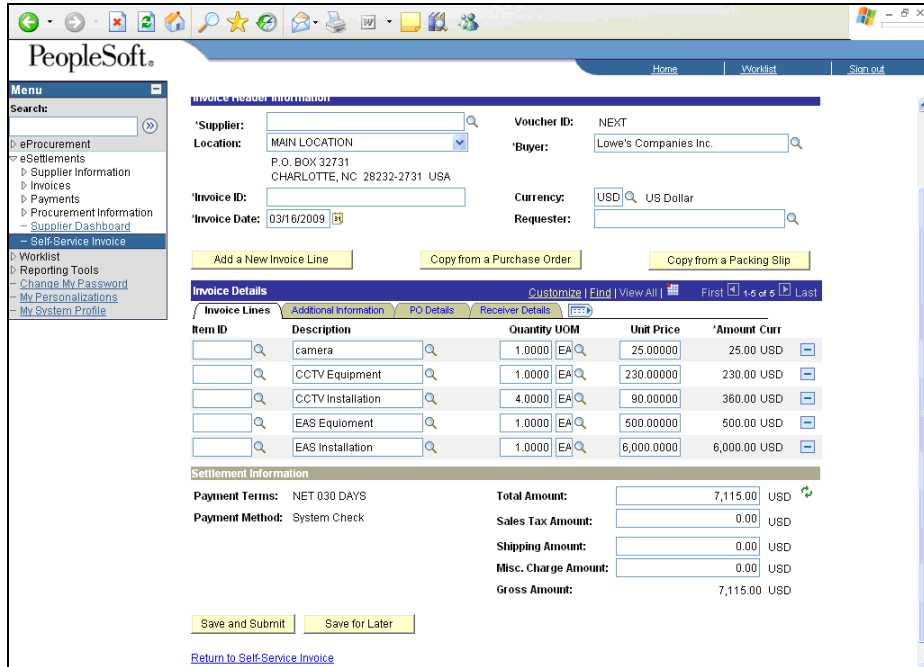




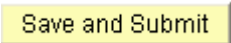
Step	Action
4	<p>Ensure the Buyer field is populated with Lowe's Companies, Inc. If it is not, click the look up function (🔍) and select Lowe's Companies from the list. Please leave the Requestor field blank.</p> <p>Click the Copy from a Purchase Order button. Copy from a Purchase Order</p>



Step	Action
5	The PO Unit is required. If this field is blank, use the look up function to determine the correct PO Unit (business unit). 🔍
6	Enter any known search criteria (i.e. PO number). Click the Search button. Search
7	Locate the purchase order (PO) to include on the invoice. Click the Select option. <input type="checkbox"/>
8	Click the Copy To Invoice button. Copy To Invoice

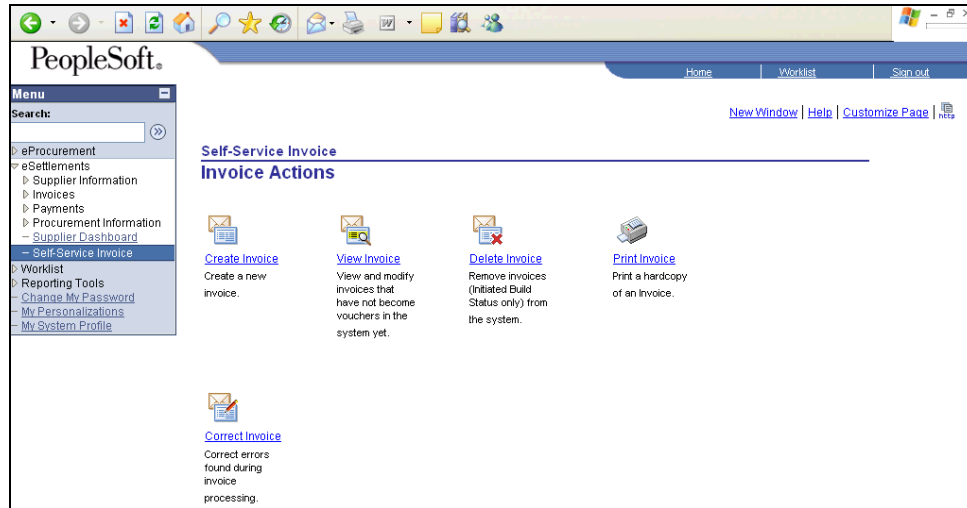
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Step	Action																		
9	The information from the PO will populate in the Invoice Details section. Verify the information matches the invoice.																		
10	<p>Enter any sales tax, shipping costs, or miscellaneous charges in the appropriate fields.</p> <p>NOTE: If sales tax is not included, the additional steps listed below are required before the invoice can be submitted.</p> <p>A. Click the expand columns icon  (or click the Additional Information tab).</p> <table border="1" data-bbox="370 1207 1242 1318"> <thead> <tr> <th>Item ID</th> <th>Description</th> <th>Quantity</th> <th>UOM</th> <th>Unit Price</th> <th>'Amount</th> <th>Curr</th> <th>Tax?</th> <th>PO Unit</th> </tr> </thead> <tbody> <tr> <td></td> <td>CCTV EQUIPMENT</td> <td>2.0000</td> <td>EA</td> <td>3,450.0000</td> <td>6,900.00</td> <td>USD</td> <td><input checked="" type="checkbox"/></td> <td>FIN01</td> </tr> </tbody> </table> <p>B. Deselect the tax check box. </p>	Item ID	Description	Quantity	UOM	Unit Price	'Amount	Curr	Tax?	PO Unit		CCTV EQUIPMENT	2.0000	EA	3,450.0000	6,900.00	USD	<input checked="" type="checkbox"/>	FIN01
Item ID	Description	Quantity	UOM	Unit Price	'Amount	Curr	Tax?	PO Unit											
	CCTV EQUIPMENT	2.0000	EA	3,450.0000	6,900.00	USD	<input checked="" type="checkbox"/>	FIN01											
11	Click in the *Invoice ID field. Note: This field is limited to 10 digits. Enter the desired information into the *Invoice ID field.																		
12	*Invoice Date will default to today's date. Using the calendar icon, the date can be back-dated 7 days, or future dated 3 weeks.																		
13	<p>Select Save for Later to review, make changes, or to add invoice details at a later time.</p> <p>Save and Submit to finalize invoice processing.</p> <p>Note: Selecting the Add a New Invoice Line button generates error reports which are consolidated and sent back to the vendor.</p> <p>Click the Save and Submit button. </p>																		

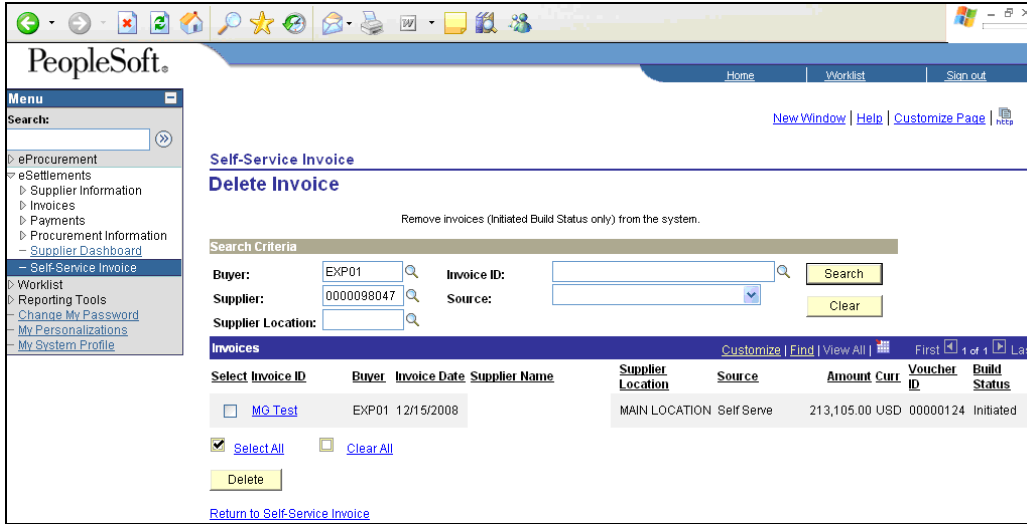
Delete an Invoice

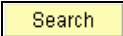

Procedure

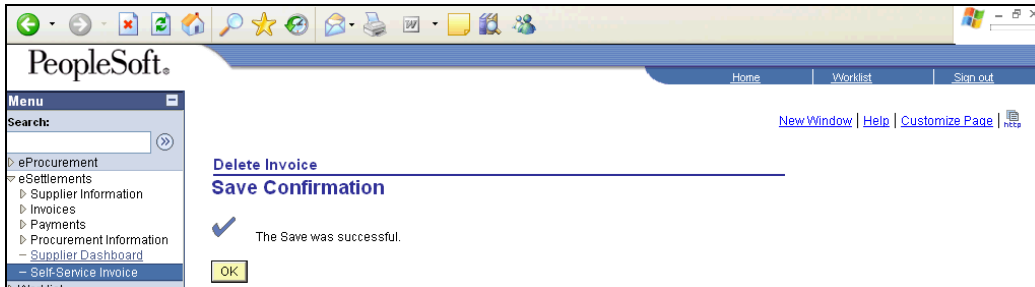


Step	Action
1.	Click the eSettlements link. 
2.	Click the Self-Service Invoice link. 
3.	Click the Delete Invoice button. 

Lowes Spend Management Vendor Functions Reference Guide



Step	Action
4.	Enter any known search criteria. Click the Search button. 
5.	Click the Select option. <input type="checkbox"/>
6.	Click the Delete button. 

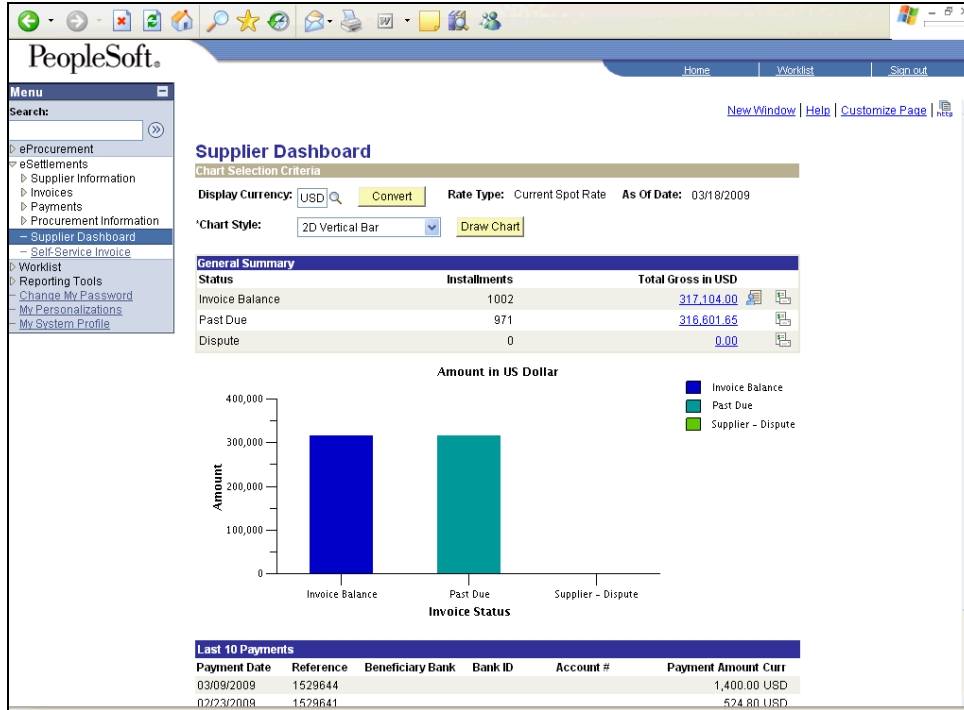


Step	Action
7.	You will receive a confirmation message. Click the OK button. 

Note: If unable to delete from here, send an email to the ExpensePOSupport@Lowes.com mailbox. Include all known details such as PO number, PO date, invoice number, invoice date, invoice amount, etc.

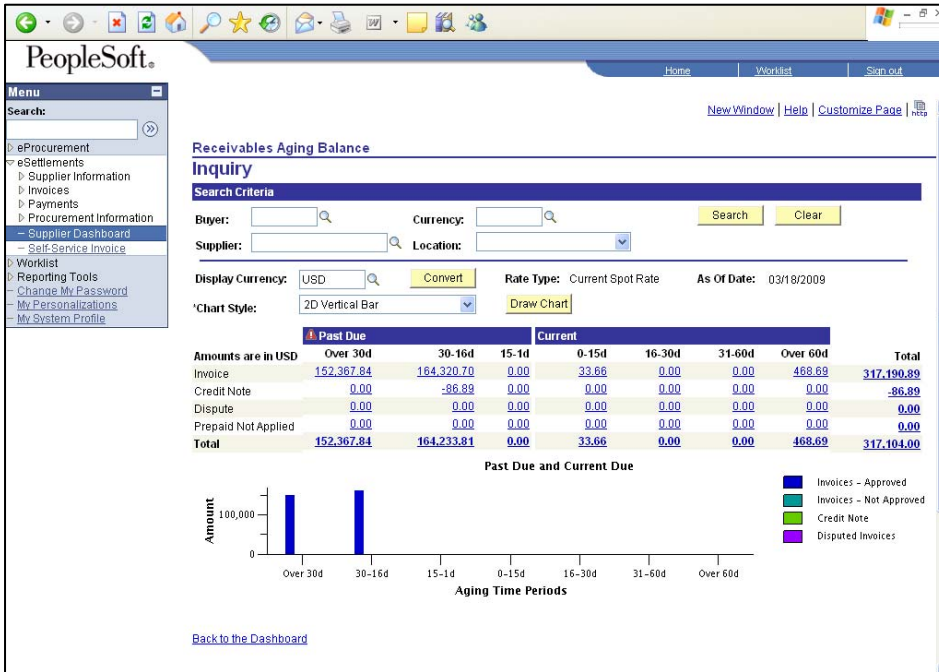
Supplier Dashboard


Procedure

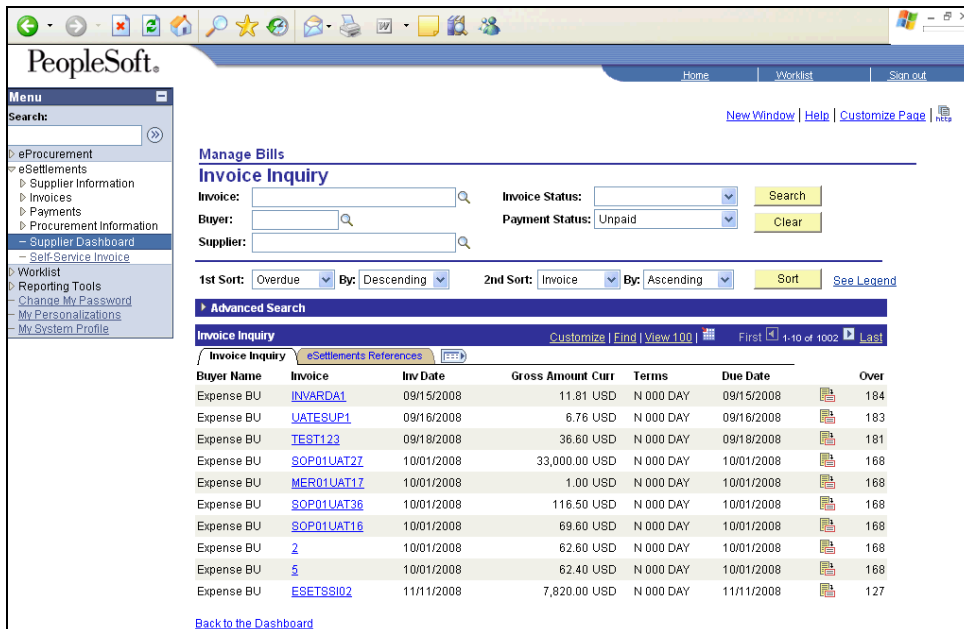


Step	Action
1.	Click the eSettlements link. eSettlements
2.	Click the Supplier Dashboard link. Supplier Dashboard
3.	<p>Invoice Balance is the total due. Past Due is a subset of the invoice balance of which the invoices are overdue. Disputes are invoices that are on hold or have match exceptions. These invoices will not be paid until the discrepancy is resolved between the Lowe's buyer and the vendor.</p> <p>Click on the hyperlink to drill down to see additional details. Click the View Aging Balance link. 317,104.00</p>

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Step	Action
4.	Review the details. When you are finished, click the Back to the Dashboard link. Back to the Dashboard
5.	From the Dashboard (screenshot on previous page), click the View by Invoice icon. 



Step	Action
6.	Review the information. Click the Bill Presentment button. 

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Electronic Invoice Presentment - Microsoft Internet Explorer provided by Lowe's

File Edit View Favorites Tools Help

Address http://fswwebd.0998.lowes.com:9290/psc/fs89qa9/EMPLOYEE/ERP/c/EM_BILL_PRESENTMENT.EM_VOUCHER_DISPLAY.GBL?Page=EM_VOL

Document References	
Invoice: INVARDA1	
Invoice Date: 09/15/2008	Due Date: 09/15/2008
Internal References	
Buyer: EXP01	Customer Ref ID: 98047
Supplier: 0000098047	Supplier Ref ID:
Remit To: 0000098047	Creation Date: 09/15/2008
Voucher: BGBMYC	

Bill From	Bill To
CORPORATE ESET07.01 - RETEST FOR 98047 ESET07.01 - RETEST FOR 98047 WILKESBORO, NC 28659 USA Business 404 123 4567 FAX 404 456 7890 Business 404/123-4567 FAX 404/987-6543	LOWE'S GENERAL OFFICE LOWE'S GENERAL OFFICE HWY 268 EAST NORTH WILKESBORO, NC 28659 USA

Gross Amount: 11.81 USD

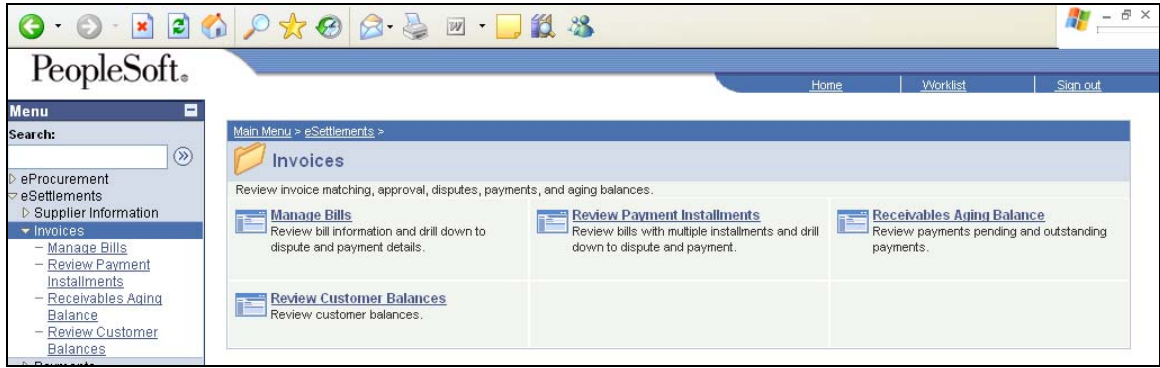
Invoice Lines						
No	PO ID	Description	UOM	Quantity	Unit Price	Net Amt
1	0080000086	Assembly- Ink roller. 1/EA	EA	1.0000	11.81	11.81

Total Net: 11.81
Gross Amount: 11.81 USD

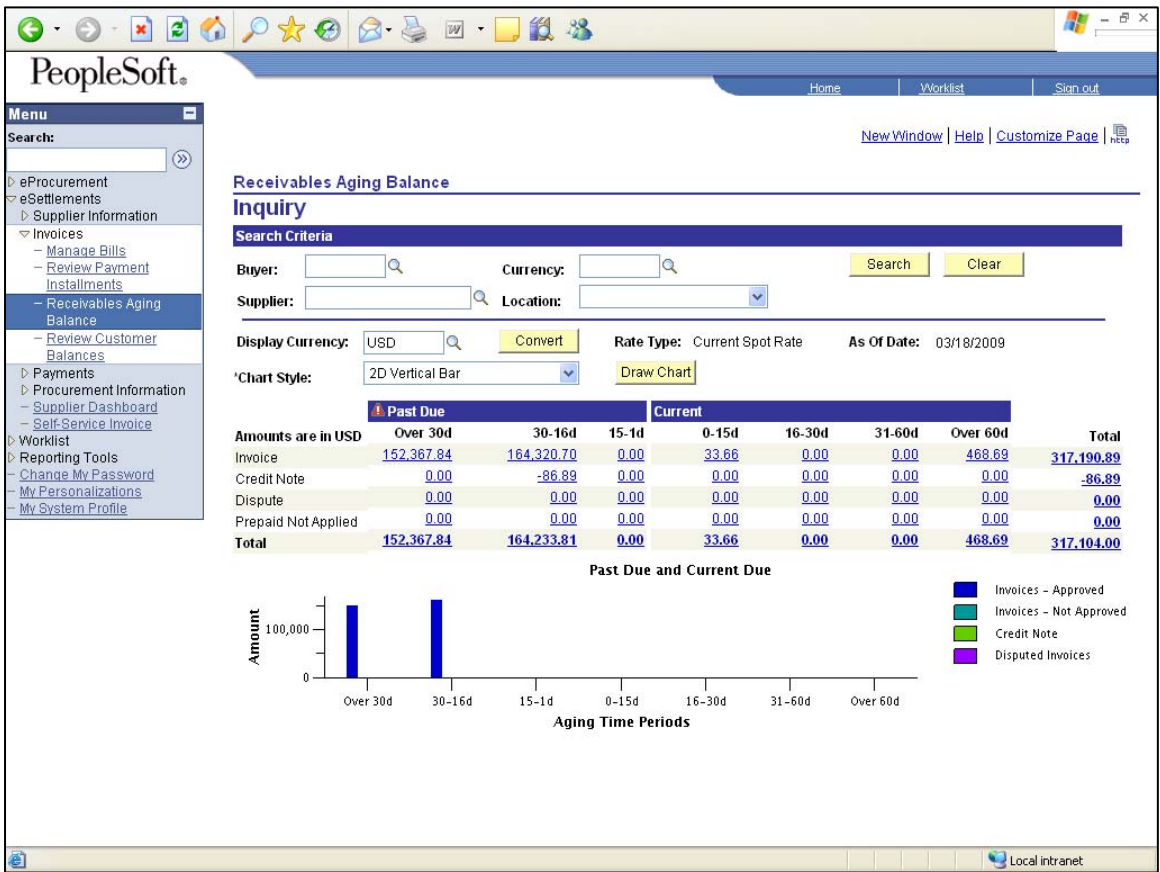
Settlement Information	
Due Date: 09/15/2008	Remit To: CORPORATE ESET07.01 - RETEST FOR 98047 ESET07.01 - RETEST FOR 98047 WILKESBORO, NC 28659 USA
Discount Amount:	
Bank From: WACHOVIA / 01	
Payment Method: System Check	Business 404 123 4567 FAX 404 456 7890 Business 404/123-4567 FAX 404/987-6543
Payment Currency: USD	Beneficiary Bank:
Terms: N 000 DAY	Beneficiary Branch:
Discount Due Date:	Account Number: ---

Step	Action
7.	Review the information. When you are finished, close the window. Click the Close button.
8.	Click the Back to the Dashboard link. Back to the Dashboard

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Step	Action
9.	Another view of this information is the Receivables Aging Balance . Click the eSettlements link. eSettlements
10.	Click the Invoices link. Invoices
11.	Click the Receivables Aging Balance link. Receivables Aging Balance
12.	Click any of the hyperlinks to view the details.



Contact Information

**If you have questions,
or are experiencing technical difficulties,
please contact Procurement Support**

336-658-4180

Monday – Friday, 8:00 a.m. until 6:00 p.m. ET

eprourement@lowes.com