Manage Orders

This section provides steps to inquire Purchase Order information awarded to you by the council.

Supplier Portal Search Orders 🗸 Order Number 🔍 Tasks 6 Orders **Requiring Attention** Recent Activity Last 30 Days Manage Orders Manage Schedules Acknowledge Schedules in Spread Ę Agreements No data available Manage Agreements 38 Deliverables Manage Deliverables Transaction Reports Last 30 Days Invoices and Payments ٠ Create Invoice Ę View Payments No data available Se Se edules Overdue or Due Today 📕 In Tenders View Active Tenders Manage Responses Supplier News Supplier Guidelines Qualifications Manage Quest View Qualification Company Profile Manage Profile

Navigate to Tasks \rightarrow Orders \rightarrow Manage Orders



Click Search: This displays the search result as shown below, you can also narrow down your search result by the search parameters provided to you. You can search by the Order Number, Supplier Site as well as Sold to Legal Entity.

nage Orders									Do
ders Schedules	Sold-to Legal Entity Bill-to BU Supplier Site	Thurrock Custom Mr	ssage	Advanced Manage Wate Order Status Include Closed Documents	hlist Save	d Search A	ul Orders	aarch E	veset Save
							Ľ	in the second se	
arch Results Actions View For Order	rmat ▼ 🧊 📴 Freeze 🗟 Detach ↔ Order Date Description	l Wrap	Supplier Site	Buyer	Ordered	Currency	Status	Life	Creation
arch Results Actions View V For Order 3 . TC100027	rmat ▼ 『 IF IFreeze II Detach ↔ Order Date Description 17/11/2018	l Wrap	Supplier Site	Buyer Buyer, Thurrock	Ordered 12,000.00	Currency	Status Open	Life Cycle	Creation Date 17/11/2018
Actions View For Order CTC100027 TC100010	rmat ▼ 37 E7 Erecze 27 Detach ↔ Order Date Description 17/11/2018 02/09/2018	il Wrap	Supplier Site CM16 5JA CM16 5JA	Buyer Buyer, Thurrock Bajaj, Devyani	Ordered 12,000.00 500.00	Currency GBP GBP	Status Open Open	Life Cycle	Creation Date 17/11/2018 02/09/2018
arch Results Actions View For Order 0 . TC100027 TC100010 0 . TC100008	mmat ▼ 3	∥ Wrap	Supplier Site CM16 5JA CM16 5JA CM16 5JA	Buyer Buyer, Thurrock Bajaj, Devyani Buyer, Thurrock	Ordered 12,000.00 500.00 1,000.00	Currency GBP GBP GBP	Status Open Open Open	Life Cycle Cycle	Creation Date 17/11/2018 02/09/2018 31/08/2018
Actions View For Order 0. TC100027 TC100010 0. TC100008 TC100005	mmat ♥ 3 P Precze 2 Detach ↔ Order Date Description 17/11/2018 02/09/2018 31/08/2018 31/08/2018	∥ Wrap	Supplier Site CM16 5JA CM16 5JA CM16 5JA CM16 5JA	Buyer Buyer, Thurrock Bajaj, Devyani Buyer, Thurrock Buyer, Thurrock	Ordered 12,000.00 500.00 1,000.00 93,000.00	Currency GBP GBP GBP GBP	Status Open Open Open	Life Cycle O O	Creation Date 17/11/2018 02/09/2018 31/08/2018 31/08/2018
Actions View For Order 0. TC100027 TC100010 0. TC100008 TC100005 0. TC100004	mmat ♥ 3 P Precze 2 Detach ● Order Date Description 17/11/2018 02/09/2018 31/08/2018 31/08/2018 28/08/2018	∥ Wrap	Supplier Site CM16 5JA CM16 5JA	Buyer Buyer, Thurrock Bajaj, Devyani Buyer, Thurrock Buyer, Thurrock Buyer, Thurrock	Ordered 12,000.00 500.00 1,000.00 93,000.00 1,200.00	Currency GBP GBP GBP GBP GBP	Status Open Open Open Closed for I	Life Cycle O O O	Creation Date 17/11/2018 02/09/2018 31/08/2018 31/08/2018 28/08/2018

Querying Open Purchase Orders: The user can query **Open Purchase Orders** by selecting the PO Order **Status** field as **Open**. This will result in all the OPEN Purchase Orders in the Search Results window.

Manage Orders	S										Dg	<u>o</u> ne
Headers Schedules												
▲ Search					A <u>d</u> vanced	Manage Watchlis	t Sav	ed Search	All Orders			~
L	Sold-to Legal Entity		•			Order						_
	Bill-to BU	~				Status Op	pen			~		
	Supplier Site	•			Include Clos	ed Documents No	· •					
										Search	Reset Save	
Search Results												
Actions 🗸 View 🕇	Format 🗸 🎵 🕞	🔲 Freeze 📓 Detach 🚽 V	Wrap									
Order	Order Date De	escription		Supplier Site	Buyer	Or	rdered	Currency	Status	Life Cycle	Creation Date	
G . TC10002	17/11/2018			CM16 5JA	Buyer, Thur	ock 12,	,000.00	GBP	Open	0	17/11/2018	
TC10001	02/09/2018			CM16 5JA	Bajaj, Devya	ni	500.00	GBP	Open	¢.	02/09/2018	
G . TC10000	31/08/2018			CM16 5JA	Buyer, Thur	ock 1,	,000.00	GBP	Open	0	31/08/2018	
TC10000	31/08/2018			CM16 5JA	Buyer, Thur	ock 93,	,000.00	GBP	Open	¢.	31/08/2018	
TC10000	24/08/2018			CM16 5JA	Buyer, Thur	ock 14,	,000.00	GBP	Open	0	24/08/2018	
Columns Hidden	24											



Purchase Order Statuses:



Figure 10

Advanced Search:

The users can add more fields or search using more parameters by using the advanced search. Click on Advanced.

Manage Orders					Done
Headers Schedules					
▲ Search		Advanced Manage Watchilst Saved Search All Orders			¥
Sold-to Legal Enti	У	▼ Order			
Bill-to E	v	Status v			
Supplier Si	e 🗸	Include Closed Documents No T			
			Search R	eset	Save

Figure 11

Add Fields:

Add Fields in the search parameters by Clicking on "Add Fields" and select any of the search parameters suitable for you.

Manage Orders

ders Schedules							
Advanced Searc	ch			Basic Manage V	Vatchlist Saved Search	h All Orders	[
Sold-to	Legal Entity Equals	•		Order Starts with	~		
	Bill-to BU Equals 🗸	\checkmark		Status Equals	✓ Open	~	
	Supplier Site Equals 🗸	•	Include Closed E	ocuments Equals 🗸	No 🗸		
					Search Re	eset Save Add Fields 🔻	Reorde
arch Results						Description	٦
ctions - View - For	mat 🕶 🕮 🖙 🖉 Det	ach 4 Wran				Document Style	
				_		EffectiveEndDate	reatio
Order	Order Date Description		Supplier Site	Buyer	Ordered CL	EffectiveStartDate	ate
3 - TC100027	17/11/2018		CM16 5JA	Buyer, Thurrock	12,000.00 GE	Exclude Orchestration Orders	1/11/20
TC100010	02/09/2018		CM16 5JA	Bajaj, Devyani	500.00 GE	Frozen	2/09/20
3 . TC100008	31/08/2018		CM16 5JA	Buyer, Thurrock	1,000.00 GE	Include Closed Documents	/08/20
TC100005	31/08/2018		CM16 5JA	Buyer, Thurrock	93,000.00 GE	Opened Date	1/08/20
TC100003	24/08/2018		CM16 5JA	Buyer, Thurrock	14,000.00 GE	Order	1/08/20
olumns Hidden 24						Pending Acknowledgment	
						Pending Change Order Exists	
						Procurement BU	
						Revision Date	
						Source Agreement	

Figure 12

On Hold Purchase Orders:

Select the Purchase Order Status as On Hold and Click Search. This will result in all the Purchase Orders on Hold.

Manage Orders									Done
Headers Schedules									
Search				A <u>d</u> vanced	Manage Watchlist	Saved Search	All Orders		~
Sold-to Legal Entity		•			Order				
Bill-to BU	~				Status On H	Hold		~	
Supplier Site	•		I	Include Close	d Documents No	~			
								Search Re	eset Save
Search Results									
Actions 🗙 View 👻 Format 👻 🛒	🖩 Freeze 🔐 Detach 斗 V	rap							
Order Order Date D	escription		Supplier Site	Buyer	Ord	ered Currend	y Status	Life Cycle	Creation Date
A . TC100047 10/01/2019			CM16 5JA	Buyer, Thurro	ck 1	11.00 GBP	On Hold	÷	10/01/2019
Columns Hidden 24									

Figure 13

The users can click on the Purchase Order number in the search results page to view the Purchase Order.

Search Results							
Actions 🗸 View 👻 Forma	t 🔻 💯 🕎 Freeze 📆 Detach 🚽 Wrap						
Order	Order Date Description	Supplier Site	Buyer	Ordered Currency	Status	Life Cycle	Creation Date
A - TC100047	10/01/2019	CM16 5JA	Buyer, Thurrock	111.00 GBP	On Hold	¢	10/01/2019
Columns Hidden 24							

Figure 14

Done

Purchase Order Details

The user can view the General Purchase Order details such as the **Sold to Legal Entity, Bill to Business Unit, Purchase order number, Purchase Order Status, Buyer, Ship-to & Bill-to Location.**

At the Line Level, the user can view **notes and attachments** if any as well as the Line Items and its schedules.

Purchase Order: TO	00048					View PE	OF Actio	ns 🔻	D <u>o</u> ne	0	rder Life Cy	/cle		
Main General Sold-to Legal Entity Bill-to BU Order	Thurrock Thurrock Busine: TC100048	əs Unit	Supplier Supplier Site Supplier Contact	FARM & COUNTRY LIMITED CM16 5JA Peter Harrison Thurrock Council Central	Orderec Description Source Agreement	I 111.00) GBP				Ordered 0	40 Amount (GBP)	80	120
Status Buver	Open Thurrock Buver		Bill-to Location	Payments	Supplier Order	r						View Details		
Creation Date	10/01/2019		Ship-to Location	Thurrock HO										
Terms Notes and Attach	ments													
Require Acknowledgmen Payment Term	d None tt None s Net30		Shipping Method Freight Terms FOB			Pay Con	on receipt firming orde	r		ŀ				
Additional Informat	ion													
Lyreco Delivery Locat	tion Number			Cont	ext Prompt									
Lines														
Actions View View Fo	rmat 🔻 🎵	📭 🖩 Freeze 📓 Detad	ch 🚽 Wrap											
Line	Item	Description			Quantity UOM	Price	Ordered	Status						
Ø 🖳 1		Medical Kits			1	11.00	111.00	Open						
Columns Hidden 13														

Figure 15

Notes and Attachments:

Lines Sche	edules View ▼ Format ▼	🖽 📴 🥅 Freeze 🗑 Deta	ah el Wrap			
	Line Item	Description		Quantity UOM	Price Ordered	Status
Ø	1	Medical Kits			111.00 111.00	Open
Columns	Hidden 13					
			Figure 16			
Attachments						>
Actions v Vie	w ▼ + ×					
Туре	Category	* File Name or URL	Title	Description	Attached By	Attached Date
File	To Supplier	Login Supplier.png	Login Supplier.png		Thurrock Buyer	10/01/2019 14:0
<						>
						Done

Figure 17



Figure 18

Actions:

The user can perform certain actions on the search results page; the user can export the search result to an **Excel File** and can **View the PDF** of the Purchase order.



Figure 19

Order Life Cycle

Managing the purchase order life cycle enables the supplier to track and monitor the execution cycle of the order and changes to the order including cancellations.

Search Results										
Actions v View v Forma	at 🔻 🎵 🕎 🥅 Freeze 🔐 Deta	ch 🚽 Wrap								
Order	Order Date Description			Supplier Site Buy	er	Ordered	Currency	Status	Life Cycle	Creation Date
TC100049 🖉 🛯	10/01/2019			CM16 5JA Buy	er, Thurrock	111.00	GBP	Open	÷.	10/01/2019
			Figure	e 20						
Purchase Order: TO	C100048				View PDF	Actions v	D <u>o</u> ne	Order Life	Cycle	
Main										
▲ General								Ordered		
Sold-to Legal Entity	Thurrock	Supplier	FARM & COUNTRY LIMITED	Or	dered 111.00 GE	3P				
Bill-to BU	Thurrock Business Unit	Supplier Site	CM16 5JA	Descr	ption					
Order	TC100048	Supplier Contact	Peter Harrison	Source Agree	ment			0	40 Amount (Gi	80 13 3P)
Status	Open	Bill-to Location	Thurrock Council Central Payments	Supplier	Drder					-
Buyer	Thurrock Buyer	Ship-to Location	Thurrock HO						View Deta	ils
Creation Date	10/01/2019									

Figure 21

PO Lifecycle Details:

Order Life Cycle: TC100049 Done Sold-to Legal Entity Thurrock Order TC100049 Supplier FARM & COUNTRY LIMITED Supplier Site CM10 SJA Fulfillment Status Billing Status Supplier Contact Peter Harrison Ordered 111.00 GBP Delivered Invoiced Amount (GBP) Amount (GBP) In-Transit Shipments Actions v View v Format v jii Ev Evence iii Detach of Wrap Shipment Ship Date Tracking Number Packing Slip No results found. Columns Hidden 2 Expected Receipt Date Shipped Carrier Bill of Lading Receipts Actions v View v Format v 💯 📴 Freeze 🛒 Detach el Wrap Receipt Receipt Date Shipment Ship Date Packing Slip Receipt Date Shipment
 Returned
 Received
 Deliverid
 Noviced
 Open to Invoice

 0.00
 50.00
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 50.00
 50.00
 0.00
 0.00

 0.00
 11.00
 11.00
 0.00
 0.00
 400028 11/01/2019 05... 400029 00030 11/01/2019 05.. ▲ Invoices Actions View Format For Packing Slip

Figure 22