VIEW PURCHASE ORDERS

PO

QUICK REFERENCE GUIDE P0-06

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to View Purchase Orders in the North Carolina Financial System (**NCFS**)**.**
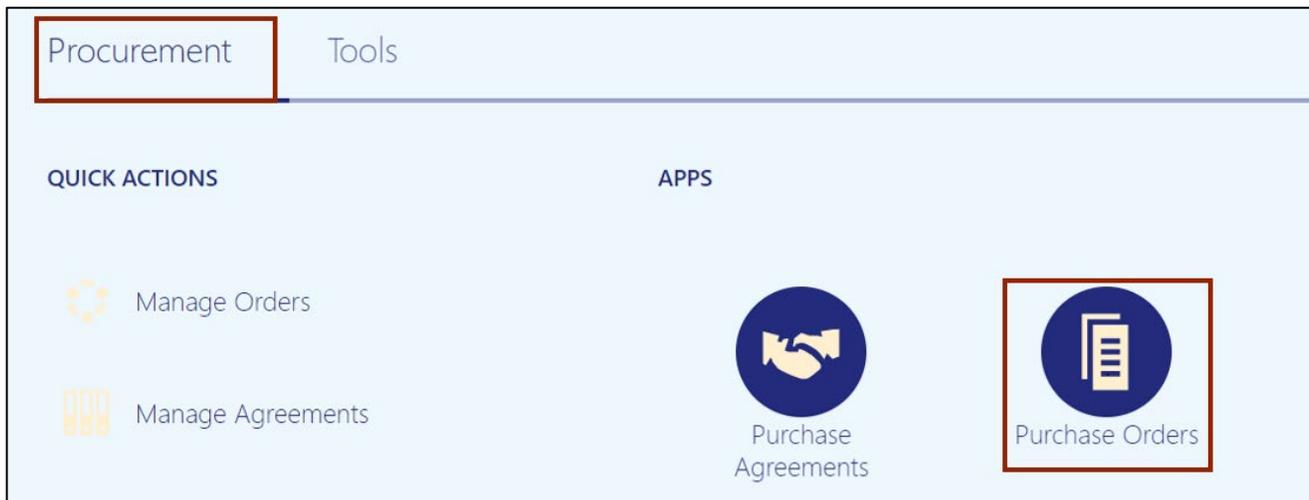
Introduction and Overview

This QRG covers how to view purchase orders in NCFS which will enable you to view the purchase order.

View Receipts

To view purchase order in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.

2. On the **Home** page, click the **Procurement** tab, and then click **Purchase Orders** app.
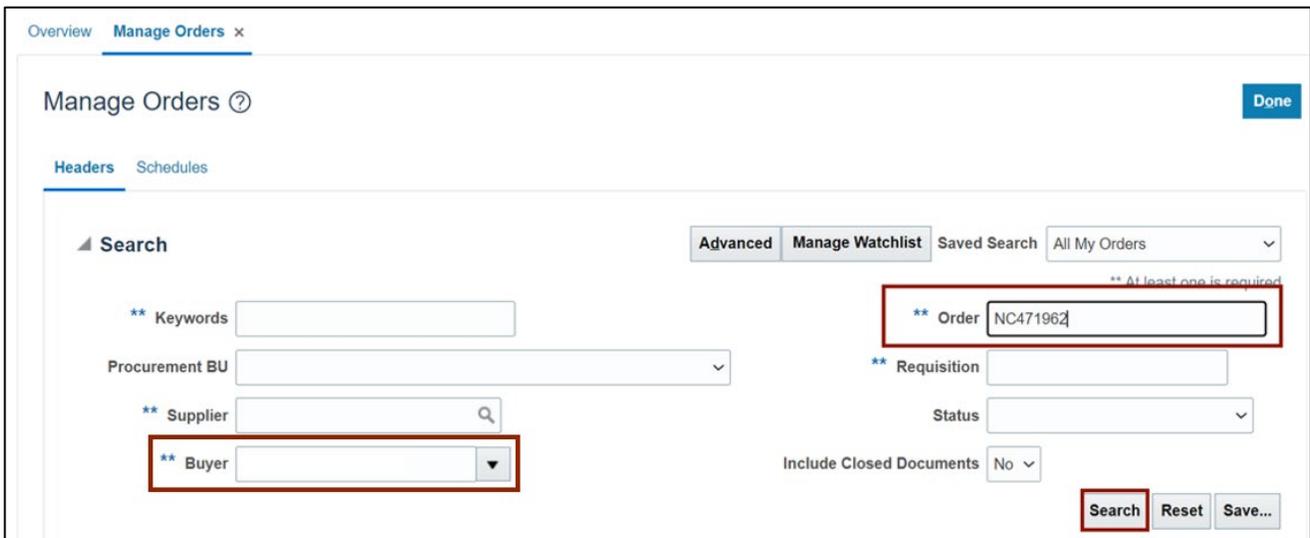
3. The **Overview** dashboard displays, click the **Tasks** [⊟] icon, and then click **Manage Orders.**
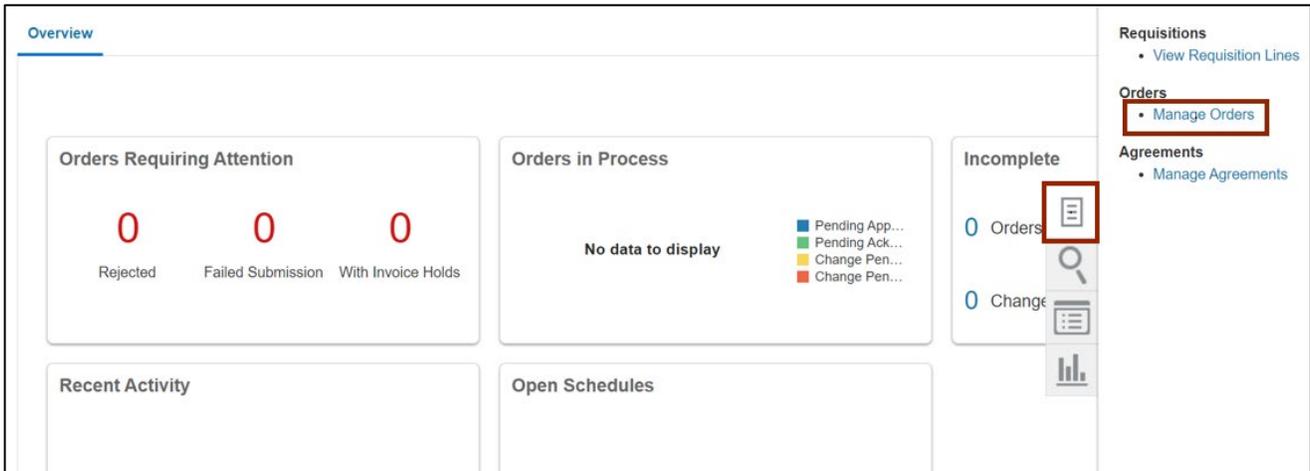
4. The **Manage Orders** page displays. On the **Headers** tab, enter the **Purchase Order** number in the *Order* field.

In this example, we choose **NC471962** and click the **Search** button.

Note: Remove the *Buyer* field before searching as it defaults to the login username.

5. The Order is displayed in the *Search Results* section. Click the **Order** link to view details.

6. The **Purchase Order: NC471962** page is displayed. Validate the **Purchase Order** details and click the **View Details** button.

7. View the Order Life Cycle details.

8. Scroll down to view *In-Transit Shipments, Receipts,* and *Invoices* section.

9. Scroll up and click the **Done** button which will redirect you to the **Purchase Order** page.

10. Optionally, you can click the **View PDF** button to export and view the Purchase Order details in a PDF format. The *Downloads* pop-up appears, click the **Open** button.

11. The **Purchase Order NC471962** details are displayed in the PDF format.

12. Back on the **Purchase Order: NC471962** page, click the *Actions* drop-drown choice list to view the actions that can be performed on the Purchase Order.

13. Scroll down and validate the information in the *Lines* section.

14. Validate the information in the *Schedules* section.

15. Validate the information in the *Distributions* section.

16. Scroll up and click the **Done** button once the PO is reviewed. This will redirect you to the **Manage Orders** page.

Wrap-Up

View purchase orders using the steps above for any purchase order that needs to be viewed and validated.

Additional Resources

Web-Based Training (WBT)

- PO001: Procurement Inquiry
- PO108: PO Buyer Close