



**FINANCIALS**

# **PURCHASE ORDER SUMMARY**

**(PURCHASE ORDER DETAILS)**

## **User Tutorial**

**Instructional Support Services**  
**Texas Woman's University**

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1. **Double Click** on the Phoenix icon on your desktop.



2. **Enter** your Portal username in the Username field.

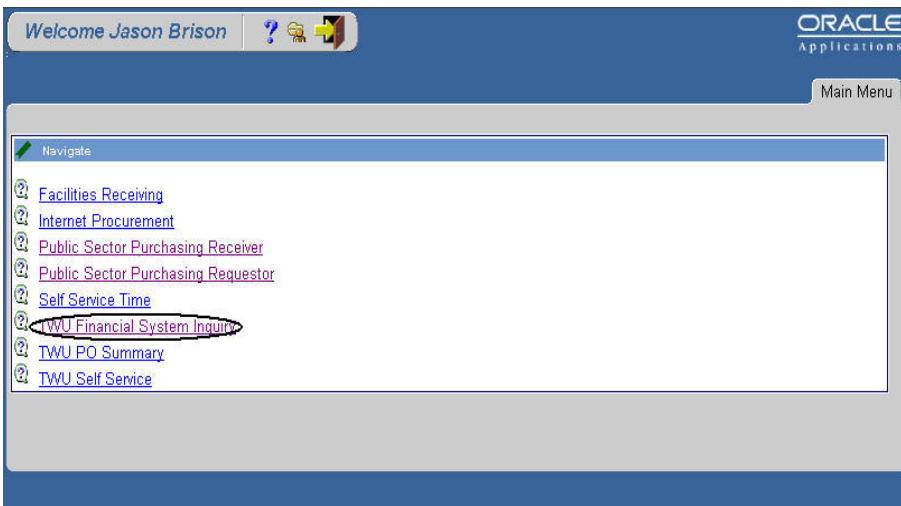
3. **Enter** your Portal password in the Password field.

4. **Click** on the Connect button.



There are several ways to access the Purchase Order Summary. This document will cover access through the TWU Financial System Inquiry.

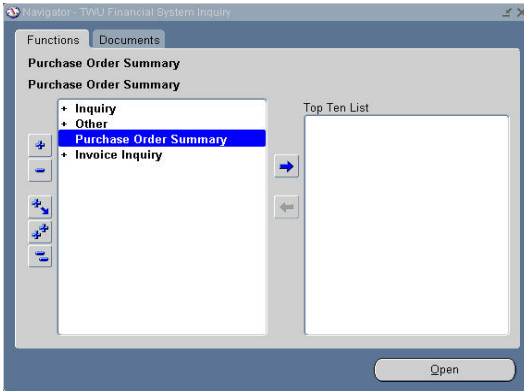
5. **Click** on TWU Financial System Inquiry



A series of windows will begin to open. All 3 Phoenix windows must remain open. Windows may be minimized by selecting the minus sign (-) in the upper right-hand corner of the window. Closing these windows will result in disconnection from the Phoenix Application.

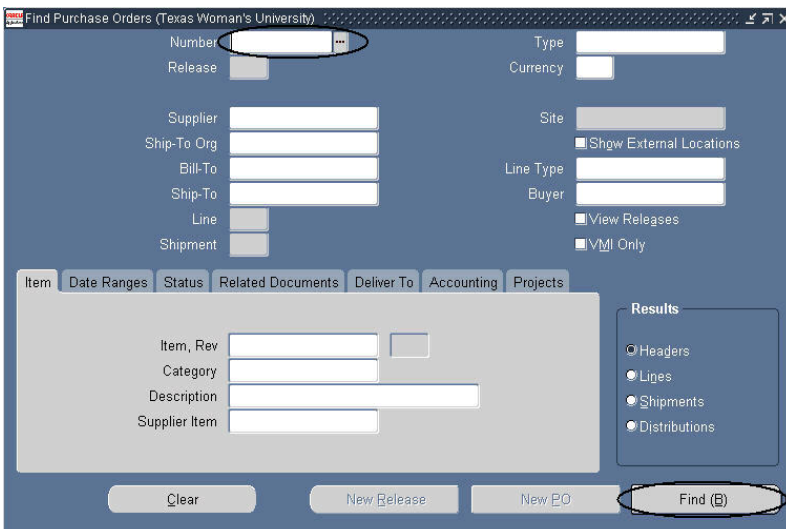


6. **Double click** on Purchase Order Summary.



7. A Find Purchase Orders form will appear. **Enter** a Purchase Order number in the Number field in the upper left hand corner of the form.

8. **Click** on the Find button in the lower right-hand corner of the form.







14. The Receipt Headers Summary form will appear. Select a specific Receipt and **click** on the Transaction button to view the Receipt Transaction record.

Receipt	Date	Supplier	Supplier Site	Shipment Number	Ship Date
2828	21-JAN-2004 08:31	Sack N Save (Min)	DENTON-1500 N I		

Transactions

15. The Receipt Transaction Summary form will appear. **Click** on the Header button located at near the lower left-hand side of the form.

Transaction Type	Quantity	UOM	Date	Item	Rev	Destination	Receipt	Source
Receive	5	Each	30-OCT			Receiving	890	Supplier
Receive	10	Each	30-OCT			Receiving	890	Supplier
Receive	5	Each	30-OCT			Receiving	890	Supplier
Receive	10	Each	30-OCT			Receiving	890	Supplier
Receive	4	Each	30-OCT			Receiving	890	Supplier
Receive	2	Each	30-OCT			Receiving	890	Supplier

Order Type: Purchase Order      Order: 456  
Source: Groggy Dog Sportswe      Transaction Date: 30-OCT-2003  
Item Description: Short-sleeved maroon t-shirt w/new v      Hazard:   
Destination: ---      UN Number:   
Header Receiver Note:      Routing: Standard Receipt  
Shipment Receiver Note:

Header

A Receipt Header will appear. This will list the Receipt Date and the name of the individual who received the item online.

Receipt: 2525      Receipt Date: 06-JAN-2004  
Shipment:   
Packing Slip:   
Carrier:   
Number of Containers:   
Supplier: Sprint PCS      Receiver: Brison, Jason Todd  
Comments:

Transactions

These various forms may be closed by clicking on the **X** in the upper right-hand corner of the form.

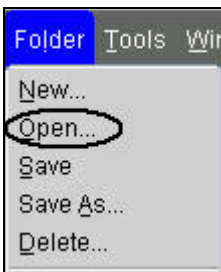
# Opening the Custom View

*\*This is an optional procedure\**

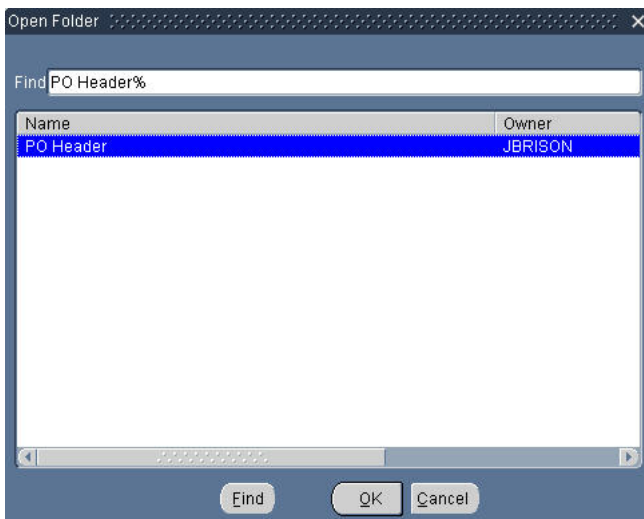
With the Purchase Order Summary you may drilldown to view various levels of information regarding a Purchase Order. The Purchase Order Summary has four forms of inquiry (***Purchase Order Header, Lines, Shipments and Distributions***). Each of these forms has a user-friendly custom view.

Follow the steps below to access the custom view and set it as your default view. After you set the view for one form drilldown to the next form and set the view for that form. This is a onetime procedure and upon successful completion you should not have to perform it again.

1. Start by **finding** a Purchase Order as explained in the steps 6-8 on page 3 of this document.
2. **Click** on the Folder menu at the top of the screen.
3. **Click** on Open.

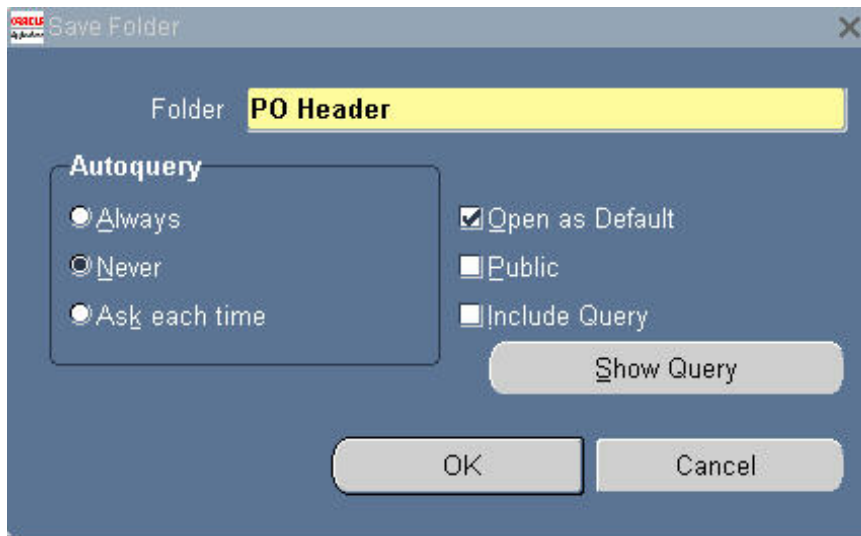


4. An Open Folder form will appear. **Double Click** on the folder that has the owner listed as **JBRISON**, as in the example below. This will open the custom view.





7. **Click** in the appropriate check box to select the same setup options as illustrated in the example below.
8. **Click** on the OK button.



*Repeat this process for each of the forms in the following order.*

1. *Purchase Order Header (you have just setup this form)*
2. *Lines*
3. *Shipments*
4. *Distributions*

Once this procedure has been successfully completed your default view will be the user-friendly custom view.