Identifying Owners & Requesters of Purchase Orders

When a Purchase Order (PO) is created, it is important to be able to identify the PO Owner and the Requester. A UD employee or a supplier may need to know who the owner of the PO is for order confirmation, shipping updates, resolution of issues, questions from suppliers and more.

There are usually two main parties involved in most POs:

• The Shopper who created the original shopping cart
• The Requester who submitted the order for approval

Sometimes the Shopper and Requester are the same person, since Requesters can also shop!
Identification on a Requisition:

On the **Summary** tab, the Requester’s name is in the **Prepared by** field. The Shopper/PO Owner’s name is in the **Prepared for** field.

This information automatically populates when the Shopper (Sean) assigns their cart to a Requester (George). However, the Requester can manually change the name of the Prepared For user if someone else should have the responsibility of being the PO Owner.
Identification on a Purchase Order

- Internal users and suppliers can also find the Owner on the PO
  - The Shopper / Owner is clearly identified in the header of the PO
  - Suppliers may use this information for questions regarding the order. The Buyer's name is also included on non-catalog purchase orders for reference.
Identification on a Purchase Order:

On the **Status** tab, the PO Owner’s name is listed in the General Information section.
To see where a supplier will see the information, select the Revisions tab of the PO. This tab houses all historic versions of the PO available. In almost all cases, the most recent version will be the one to select:

Revisions are listed newest to oldest by Revision Date. Select the HTML Body Email PO link to open a copy of the PO as the supplier received it.
Scroll down to the **Shipping Instructions** section of the PO.

The PO Owner is identified as the **Contact** in the **Requestor Information** section.
Owner Changes for a Purchase Order

Occasionally, it may be necessary to change the Owner of a PO

- Example: The PO Owner has changed departments and their original department needs to retain visibility of the PO since document access is dictated by the PO Owner’s HR department.

To change the owner of a PO, add a Comment to the PO with Procurement Help as the recipient, naming the new PO owner.
To send a comment request to Procurement Help:

Select the **Comments** tab.
Click the ’+’ to **Add New Comment**.
Click the blue Add Recipient link.
Type the keyword "help" in the **Last Name** field.

Click **Search**.
Select **Procurement Help** from the available options.
Type a comment requesting the change of PO owner.

Select the **Check Mark** to Add and send the Comment.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Understanding Access in UD Exchange