

UNIVERSITY OF DELAWARE[®] EXCHANGE

Identifying Requesters of Purchase Orders
Revised 05/31/2023

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!



Summary

Comments 3

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.

General

Status ✓ Completed
(7/20/2020 10:03)

Submitted 7/14/2020 9:50 AM

Cart Name Articulate - Day 2 Homework

Description Ultrasound Equipment

Priority Normal

Prepared by **George Walueff**

Prepared for **Sean Malone**

University of Delaware
Attn: Linguistics& Cognitive Science
Room: Room 0110
125 E Main St
125 E Main St
Newark, DE 19711
United States

Accounts Payable
accountspayable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Accounting Date *no value*

Delivery Options

Expedite ✗

Carrier Best Way

Requested Delivery Date

Purchasing Business Unit UOD01
UNIVERSITY OF DELAWARE

eBuilder Process Instance *no value*

Multi-Invoice/Payment ✗

Buyer Information

User does not have the necessary permissions to view the custom fields associated with this section.

Accounting Codes

Work Order Number	SpeedType	Purpose	Fund	Dept	Program	Source	Project ID
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Completed

and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	12,885.00
12,885.00	

Related Documents

Purchase Order: UDS0000597

What's next?

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.



- Status**
- Summary
- Revisions 2
- Confirmations
- Shipments
- Change Requests
- Receipts
- Vouchers
- Comments
- Attachments 1
- History

General Information

PO/Reference No.

Revision No.

Supplier Name

Purchase Order Date 7/20/2020

Total 12,885.00

Owner Name Sean Malone

Owner Phone +1 302-831-2125

Owner Email spmalone@udel.edu

Requisition Number 2999742 view | print

Identification on a Purchase Order:

On the **Status** tab, the PO Owner's name is listed in the General Information section.

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view

Email (HTML Body) ud-mart@udel.edu

Distribution options have been overridden for this PO

Distribution Date/Time 8/6/2020 8:59 AM

Supplier Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal 12,885.00

12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status ● Completed

Workflow

Show skipped steps

Submitted
7/20/2020 10:03 PM
Sean Malone

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	EchoB 128 CEXT-1Z Compact External Ultrasound System Modified for Speech Research	CEXT-1Z	EA	4,765.85	1 EA	4,765.85

DETAILS

Supplier	Receiving	Invoicing	Matching
Sent To Supplier	none	none	No Matches



Records found: 2

Revision No.	Revision Date	Revision Name	Revised By		
1	8/6/2020 8:59 AM	PO Export	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	PO-Terms-And-Conditions-Oct2019.pdf (System)
original	8/6/2020 8:58 AM	original	System	PO Documents	HTML Body Email PO PO Export Document
				Attachments	PO-Terms-And-Conditions-Oct2019.pdf (System)

Completed

Details

Supplier Status

Sent To Supplier

Supplier
ARTICULATE INSTRUMENTS LTD

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12,885.00

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.

Submitted
7/20/2020 10:03 PM
Sean Malone



	External Note								
6 of 8	UltraFit Probe Stabilisation Headset					EA	1,122.15 USD	1 EA	1,122.15 USD
	Taxable	No							
	Capital Expense	No							
	Commodity Code								
	External Note								
7 of 8	Audio Bundle							1 EA	264.04 USD
	Taxable								
	Capital Expense								
	Commodity Code	41000000 Laboratory, Measuring, Observing & Testing Equipment							
	External Note								
8 of 8	Carriage (Incoterm CPT, Newark Courier)					EA	112.26 USD	1 EA	112.26 USD
	Taxable	No							
	Capital Expense	No							
	Commodity Code	78000000 Transportation, Storage & Mail Services							
	External Note								

Scroll down to the **Shipping Instructions** section of the PO.
 The PO Owner is identified as the **Contact** in the **Requestor Information** section.

Shipping, Handling and Tax charges are calculated and charged by each supplier. Total **12,885.00 USD**

Shipping Instructions

Note to Supplier	
Supplier Terms and Conditions	PO-Terms-And-Conditions-Oct2019.pdf (65k)
Requestor Information	
Contact	Sean Malone
Email	somalone@udel.edu
Phone	+1 302-831-2125
Approval Signature	

Billing Information		Billing Address
Contract	no value	University of Delaware
Quote number	766	Accounts Payable accounts payable@udel.edu 222 South Chapel Street Newark, DE 19716 United States



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.



- Status
- Summary
- Revisions 2
- Confirmations
- Shipments
- Change Requests
- Receipts
- Vouchers
- Comments**
- Attachments 1
- History

Records found: 0

Show comments for Purchase Order +

No comments have been added

To send a comment request to Procurement Help:

Select the **Comments** tab.

Click the **'+'** to **Add New Comment**.

Completed

Details

Supplier Status

Sent To Supplier

Supplier
ARTICULATE INSTRUMENTS LTD

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Subtotal	12,885.00
	12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status ● Completed

Workflow 📄 🖨

Show skipped steps

✓ **Submitted**
7/20/2020 10:03 PM
Sean Malone



Records found: 0

Show comments for Purchase Order ▾ +

ADD COMMENT



1000 characters remaining

[expand](#) | [clear](#)

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

[Email notification\(s\)](#) | [Add recipient](#)

- George Walueff (Prepared by) <ud-mart@udel.edu>
- Kristen L Pickering (Approved) <kpick@udel.edu>
- Sean Malone (Prepared for) <ud-mart@udel.edu>

Attach file (optional)

Attachment Type

 File Link/URL

File Name

File

Choose File

Upload your file

No comments have been added

Click the blue Add Recipient link.

Completed

Details ▾

Supplier Status

Sent To Supplier

Supplier

ARTICULATE INSTRUMENTS LTD

Total (12,885.00 USD) ▾

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Subtotal	12,885.00
	12,885.00

Related Documents ▾

Requisition: 2999742



What's next? ▾

Workflow Status

● Completed

Workflow

 Show skipped steps

Submitted

7/20/2020 10:03 PM

Sean Malone



Records found: 0

ADD COMMENT

1000 characters remaining expand | clear

- Email
- K
- S

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page

Type the keyword "help" in the Last Name field.
Click Search.

Purchase Order

ting that a comment has been

Completed

Details

Supplier Status
Sent To Supplier
Supplier
ARTICULATE INSTRUMENTS LTD

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Related Documents

Requisition: 2999742

What's next?

Workflow Status Completed

Workflow

Show skipped steps

Submitted
7/20/2020 10:03 PM
Sean Malone



User Search

New Search

Name ↑	User Name	Email	Phone	Action
Procurement Help	Procurement	udexchange@udel.edu		+

Close

Select **Procurement Help** from the available options.

- Email notification(s) | Add recipient
- George Walueff (Prepared by) <ud-mart@udel.edu>
 - Kristen L Pickering (Approved) <kpick@udel.edu>
 - Sean Malone (Prepared for) <ud-mart@udel.edu>

ARTICULATE INSTRUMENTS LTD

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12,885.00

Related Documents

Requisition: 2999742

What's next?

Workflow Status **Completed**

Workflow

Show skipped steps

Submitted
7/20/2020 10:03 PM
Sean Malone



Records found: 0

Show comments for Purchase Order +

ADD COMMENT



Please change PO owner to George Walueff since Sean has changed departments.

- George Walueff (Prepared by) <ud-mart@udel.edu>
- Kristen L Pickering (Approved) <kpick@udel.edu>
- Sean Malone (Prepared for) <ud-mart@udel.edu>
- Procurement Help <udexchange@udel.edu>

Type a comment requesting the change of PO owner.
Select the **Check Mark to Add and send the Comment.**

File Choose File Upload your file

No comments have been added

Completed

Details

Supplier Status
Sent To Supplier
Supplier
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Related Documents

Requisition: 2999742

What's next?

Workflow Status **Completed**

Workflow

Show skipped steps

Submitted
7/20/2020 10:03 PM
Sean Malone



Questions:

- procurement@udel.edu

Resources:

- [Procurement Services Website](#)
- [Understanding Access in UD Exchange](#)

