

REVIEWING PURCHASE ORDERS

eSupplier is a self-service module that provides suppliers access to view the real-time status on payment information that exists between the supplier and the agency they are doing business with. This job aid provides step-by-step instructions on how to log into the eSupplier portal and review purchase orders.

Logging Into the eSupplier Portal



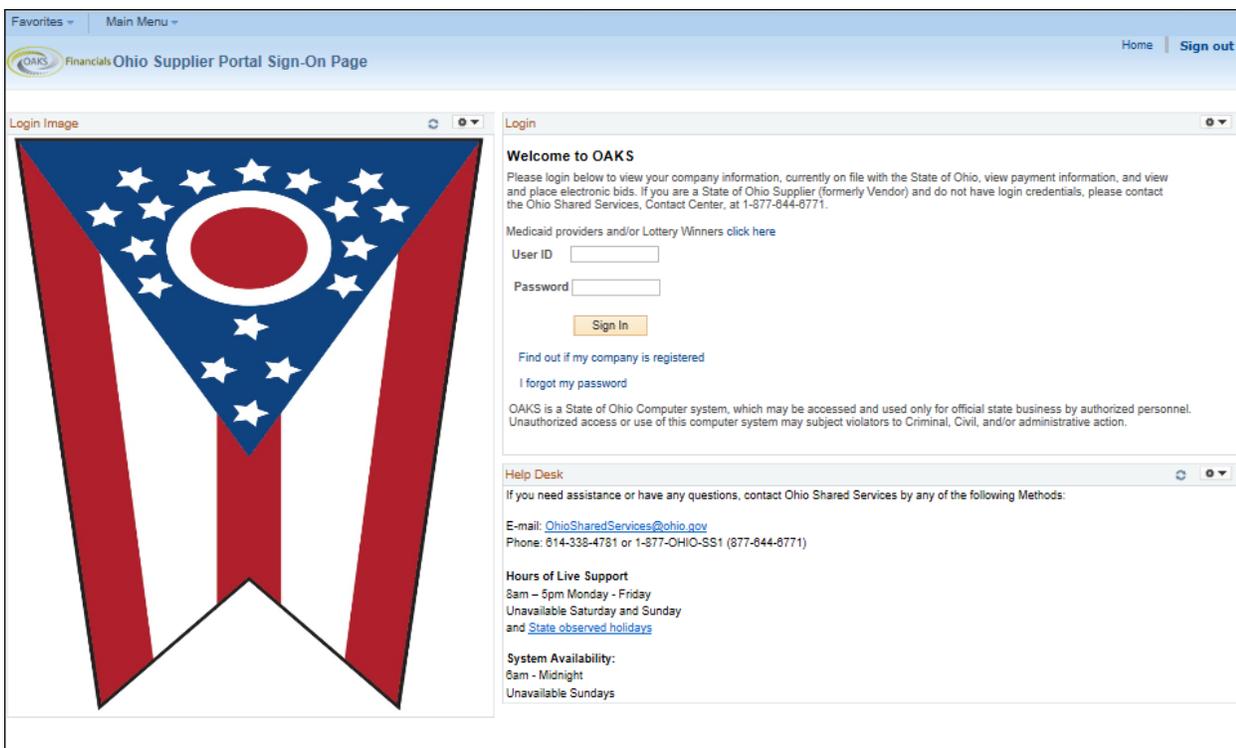
Before beginning the steps below, navigate to <http://www.obm.ohio.gov/supplier/>.

The screenshot shows the Ohio Supplier Portal homepage. At the top left is the Ohio state logo. To its right is the text "Ohio Supplier Portal" in a large, red, serif font. In the top right corner, there is a navigation bar with "Ohio.gov" and "State Agencies | Online Services". Below the header, a paragraph of text explains the portal's purpose and includes a link to the sign-on page. Underneath, there is a section titled "Are you a..." with three buttons: "Supplier", "Medicaid Provider", and "Lottery Winner". Below that is a "Need Help?" section with a "Training / Instructional Guide" button. At the bottom, there is a small image of a document titled "About eSupplier" with a red icon.

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Step-by-Step	Screen
<p>1. Click the Click here to go straight to the Ohio Supplier Portal Sign-On Page link.</p>	<p>ent information, as well as placing bids and viewing address and contact information. Click here to go straight to the Ohio Supplier Portal Sign-On Page.</p> 

The Ohio Supplier Portal Sign-On Page displays.



Note If you have not received your login credentials, contact the OSS Contact Center to gain access to the Ohio Supplier Portal.

- Phone: 614-338-4781 or 1-877-OHIO-SS1 (877-644-6771).

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<p>2. Enter User ID.</p>	<p>Login</p> <p>Welcome to OAKS</p> <p>Please login below to view your company information, currently o and place electronic bids. If you are a State of Ohio Supplier (for the Ohio Shared Services, Contact Center, at 1-877-644-6771.</p> <p>Medicaid providers and/or Lottery Winners click here</p> <p>User ID <input type="text"/></p> <p>Password <input type="password"/></p> <p><input type="button" value="Sign In"/></p>
<p>3. Enter Password.</p>	<p>Welcome to OAKS</p> <p>The Ohio Supplier Portal page is where suppliers can do m information, electronic bidding, and access eSettlements to</p> <p>Medicaid providers and/or Lottery Winners click here</p> <p>User ID <input type="text" value="ADMIN123"/></p> <p>Password <input type="password"/></p>
<p>4. Click Sign In.</p>	<p>Medicaid providers and/or Lottery Winners click here</p> <p>User ID <input type="text" value="ADMIN123"/></p> <p>Password <input type="password" value="*****"/></p> <p><input type="button" value="Sign In"/></p>

REVIEWING PURCHASE ORDERS

The **Main Menu** displays.

The screenshot shows the OAKS Financials Main Menu. At the top, there are navigation tabs for 'Favorites' and 'Main Menu'. The header includes the OAKS Financials logo, a 'Home' button, a 'Worklist' button, an 'Add to Favorites' button, and a 'Sign out' button. Below the header, there are links for 'Personalize Content | Layout' and a 'Help' icon. The main content area is titled 'Menu' and features a search bar with a magnifying glass icon. Below the search bar is a list of menu items, each preceded by a right-pointing arrow: Administration, Utilities, Maintain Supplier Information, Manage Events and Place Bids, Manage Orders, Manage Supply, Review Payment Information, eSettlements, Worklist, Tree Manager, Reporting Tools, PeopleTools, Usage Monitoring, Change My Password, My Personalizations, My System Profile, My Dictionary, and My Feeds.

REVIEWING PURCHASE ORDERS

Review Purchase Orders

Suppliers can view all invoices that have been vouchered against a Purchase Order (PO) from the **Purchase Order Details** page.



OAKS FIN > Main Menu > Manage Orders

Manage Orders

Manage Orders

View and download purchase orders, enter acknowledgements and create advance shipment notices for customer orders.

Purchase Orders
Review and take action on customer purchase orders.

View Receipts
View customer receipts.

1. Select the **Purchase Orders** link.

Manage Orders

Manage Orders

View and download purchase orders, enter acknowledgements and

Purchase Orders
Review and take action on customer purchase orders.

REVIEWING PURCHASE ORDERS

The **Purchase Orders Filter Options** page is displayed.



The date range will default to the past 30 days.

Navigation: Favorites > Main Menu > Manage Orders > Purchase Orders

Home | Worklist | Add to Favorites | Sign out

OAKS Financials

New Window | Help | Personalize Page

Purchase Orders

Filter Options

John Doe & Associates

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From PO ID PO's Waiting Acknowledgement

To PO ID

Item ID

Supplier Item ID

From Date (example: 01/31/2000)

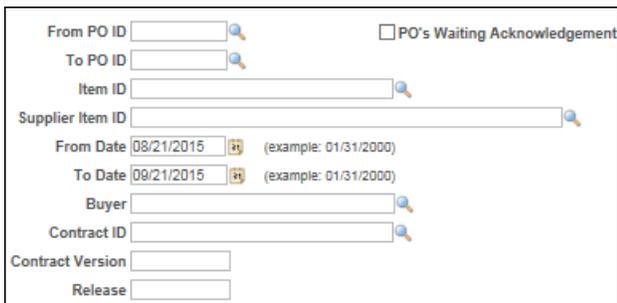
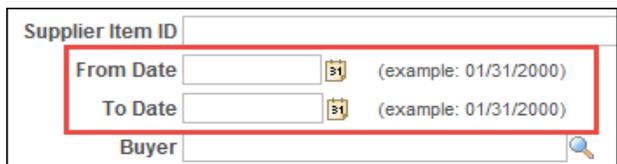
To Date (example: 01/31/2000)

Buyer

Contract ID

Contract Version

Release

<p>2. Enter identifying information in the Search Criteria section to search for the correct purchase order.</p>	
<p>3. Clear the date fields to view all purchase orders.</p>	

REVIEWING PURCHASE ORDERS

4. Click **Search**.

Contract Version

Release

Search

The **Purchase Orders** page is displayed.

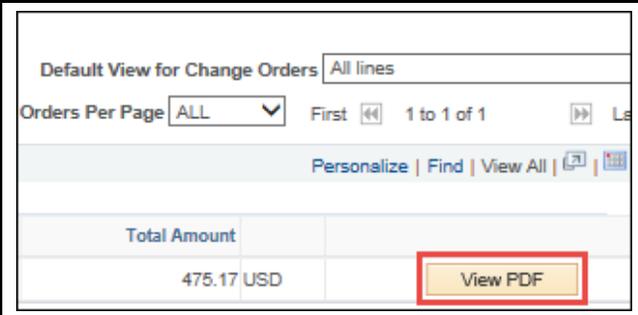
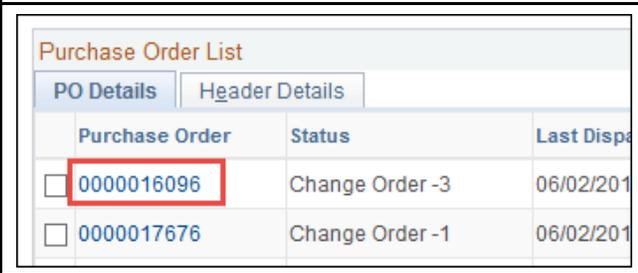
Note There is a count on the page that shows the total number of purchase orders that were returned based on the search criteria.

The screenshot shows the 'Purchase Order List' page for 'ABC Company'. It features a table with columns for Purchase Order, Status, Last Dispatched Date/Time, Lines, and Total Amount. Each row includes a 'View PDF' button. Callouts 1-6 highlight: 1. 'POs Returned' count (126); 2. 'Purchase Order' column header; 3. 'Status' column header; 4. 'Last Dispatched Date/Time' column header; 5. 'Lines' column header; 6. 'Total Amount' column header.

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount
0000016096	Change Order -3	06/02/2015 3:24:05PM	1	8,839,644.70 USD
0000017676	Change Order -1	06/02/2015 7:59:45AM	1	41,479,093.96 USD
0000016097	Change Order -1	04/10/2015 3:45:40PM	1	898,131.00 USD
0000016583	Change Order -1	04/10/2015 3:44:23PM	1	588,331.00 USD
0000017675	Dispatched	04/09/2015 9:24:54AM	2	400,000.00 USD
0000017317	Dispatched	12/29/2014 12:10:49PM	1	395,000.00 USD
0000014582	Dispatched	12/15/2014 7:11:32AM	1	1,223,592.00 USD
0000016603	Dispatched	08/14/2014 3:27:36PM	2	7,514,000.00 USD
0000016456	Dispatched	07/31/2014 8:46:58AM	1	25,807,183.84 USD
0000016165	Dispatched	07/14/2014 10:25:20AM	1	19,511,896.00 USD
0000015954	Compl	06/23/2014 8:29:54AM	1	200,079.17 USD
0000014637	Change Order -2	06/19/2014 8:07:31AM	1	57,455,586.55 USD
0000015927	Compl	06/18/2014 12:07:05PM	1	258,114.00 USD
0000015915	Compl	06/17/2014 1:20:17PM	1	2,992,934.00 USD
0000014466	Change Order -2	12/13/2013 9:30:43AM	1	764,863.46 USD

1. **POs Returned:** The total number of purchase orders that were returned based on the search criteria.
2. **Purchase Order:** A number assigned to a purchase order.
3. **Status:** The status of the PO.
4. **Last Dispatched Date/Time:** The last date/time that the purchase order was dispatched.
5. **Lines:** Number of lines per Purchase Order.
6. **Total Amount:** The payment amount due to the supplier.

REVIEWING PURCHASE ORDERS

<p>5. Click the View PDF button next to the correct purchase order to download a PDF file summarizing information on the PO.</p>	 <p>Default View for Change Orders: All lines</p> <p>Orders Per Page: ALL First 1 to 1 of 1</p> <p>Personalize Find View All</p> <table border="1"> <thead> <tr> <th>Total Amount</th> <th></th> </tr> </thead> <tbody> <tr> <td>475.17 USD</td> <td>View PDF</td> </tr> </tbody> </table>	Total Amount		475.17 USD	View PDF								
Total Amount													
475.17 USD	View PDF												
<p>6. Click on a Purchase Order in the Purchase Order List to view details.</p>	 <p>Purchase Order List</p> <p>PO Details Header Details</p> <table border="1"> <thead> <tr> <th></th> <th>Purchase Order</th> <th>Status</th> <th>Last Dispa</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0000016096</td> <td>Change Order -3</td> <td>06/02/201</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0000017676</td> <td>Change Order -1</td> <td>06/02/201</td> </tr> </tbody> </table>		Purchase Order	Status	Last Dispa	<input type="checkbox"/>	0000016096	Change Order -3	06/02/201	<input type="checkbox"/>	0000017676	Change Order -1	06/02/201
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<input type="checkbox"/>	0000017676	Change Order -1	06/02/201										

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The **Purchase Order Details** page displays.



Line details and invoices related to the purchase order are displayed if any exist.

[Favorites](#) | [Main Menu](#) > [Manage Orders](#) > [Purchase Orders](#)

[Home](#) | [Add to Favorites](#) | [Sign out](#)

[New Window](#) | [Personalize Page](#)

Purchase Orders

Purchase Order Details

ABC COMPANY

PO Number 0000026850	Purchase Order Date 01/04/2012	
PO Status Complete	Last Dispatch 06/11/12 8:31:18AM	
Buyer eSettlements Buyer User		
Billing Location P003574		
Payment Terms Net 30		

Purchase Order Total	
Merchandise Amount	475.17
Freight/Tax/Misc.	0.00
Total Amount	475.17 USD

[&Header Comments](#)

[Find](#) | [View All](#) | First 1 of 1 Last

[View](#)

Purchase Order Lines

[Personalize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Line	Status	Item ID	Description	Quantity	Merchandise Amt
1	Closed		BSX-RB42TC CONFERENCE ROOM TABLES/ROUND TABLE TOP # 884842 (HARVEST)	1.0000 AMT	266.23 USD
2	Closed		BSX-X42BC ROUND TABLE BASE	1.0000 AMT	208.94 USD

Invoice List

[Personalize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Invoice	Invoice Date	Amount	Due Date	Appr stat	Voucher
		0.000			

No Invoices Found
[Return to Purchase Order List](#)



See the following pages for field-level descriptions.

REVIEWING PURCHASE ORDERS

Navigation: Favorites | Main Menu | Manage Orders | Purchase Orders | Home | Add to Favorites | Sign out

OAKS Financials | New Window | Personalize Page

Purchase Orders

Purchase Order Details

ABC COMPANY

1 PO Number 0000028850 6 Purchase Order Date 01/04/2012
PO Status Complete 2 7 Last Dispatch 08/11/12 8:31:18AM
3 Buyer eSettlements Buyer User
4 Billing Location P003574
5 Payment Terms Net 30

Purchase Order Total	
8 Merchandise Amount	475.17
9 Freight/Tax/Misc.	0.00
10 Total Amount	475.17 USD

&Header Comments Find | View All First 1 of 1 Last

View

1. **PO Number:** A number assigned to the purchase order.
2. **PO Status:** The status of the PO.
3. **Buyer:** Not used, defaults to 'eSettlements Buyer User.'
4. **Billing Location:** State-used code.
5. **Payment Terms:** The time frame in which the supplier will be paid based on the contract agreement.
6. **Purchase Order Date:** The date the purchase order was entered in OAKS FIN.
7. **Last Dispatch:** Late date/time that the purchase order was dispatched.
8. **Merchandise Amount:** The Invoice total minus any fee/tax exceptions.
9. **Freight/Tax/Misc.:** Freight, tax, or miscellaneous cost due to the supplier.
10. **Total Amount:** The total amount owed to the supplier.

REVIEWING PURCHASE ORDERS

Header Comments Find | View All | First 1 of 1 Last

[View](#)

Purchase Order Lines Personalize | Find | View All | First 1-2 of 2 Last

Line Information	Extension	Line Details	Contract Info		
Line	Status	Item ID	Description	Quantity	Merchandise Amt
1	Closed		BSX-RB42TC CONFERENCE ROOM TABLES/ROUND TABLE TOP # 884842 (HARVEST)	1.0000 AMT	266.23 USD
2	Closed		BSX-X42BC ROUND TABLE BASE	1.0000 AMT	208.94 USD

Invoice List Personalize | Find | View All | First 1 of 1 Last

Invoice	Invoice Date	Amount	Due Date	Appr Stat	Voucher
		0.000			

No Invoices Found
[Return to Purchase Order List](#)

1. **Extension Tab:** Not used.
2. **Line Details Tab:** Purchase order line details
3. **Contract Info Tab:** If contract use, contract details are displayed.
4. **Line:** Hyperlink to additional purchase order line item detail.
5. **Status:** Line Status.
6. **Item ID:** An ID associated with each item. If a purchase order is associated with the invoice and an item ID is populated on the purchase order, this is the item ID from purchase order.
7. **Description:** Item ID description.
8. **Quantity:** Quantity of Item units ordered.
9. **Merchandise Amt:** The total cost of the Item.
10. **Invoice:** Number assigned to the invoice.
11. **Invoice Date:** The date the invoice was entered in OAKS FIN.
12. **Amount:** The total amount due to the supplier.
13. **Due Date:** The payment due date.
14. **Appr Stat:** Approval Status
15. **Voucher:** Voucher number that the invoice was paid on.