

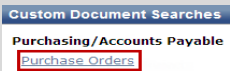
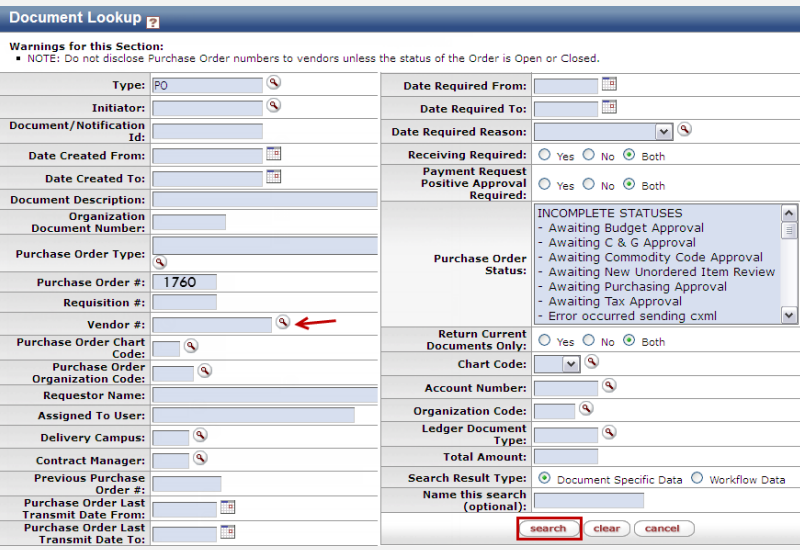
KUALI FINANCIAL SYSTEM

UNIVERSITY of CALIFORNIA · IRVINE

QUICK START GUIDE: LOOK UP A PURCHASE ORDER

Summary: Looking up a Purchase Order (PO) is usually performed by Accounts Payable (AP) if a department or vendor has input a wrong/incomplete PO number on an invoice. When receiving an invoice from a vendor or department, AP must enter the PO# in order to create a Payment Request (PREQ). If the PO# does not appear, users can perform a Purchase Order search to find the original Purchase Order and/or the PO#.

Replacement: KFS PO Document Lookup replaces the PAL PO order inquiry in Zeus.

Steps	What you need to do	How to do it
1	Access KFS via ZOTPortal	<ol style="list-style-type: none"> Use your UCInetID and password to log in to https://portal.uci.edu/ Press the Faculty and Staff tab and then select the KFS tab.
2	Access Purchase Orders	<ol style="list-style-type: none"> From the KFS Purchasing Accounts Payable portlet, expand the Custom Document Search bullet Select Purchase Orders 
3	Search	<ol style="list-style-type: none"> Enter desired search criteria <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">  <p>Document Lookup</p> <p>Warnings for this Section: • NOTE: Do not disclose Purchase Order numbers to vendors unless the status of the Order is Open or Closed.</p> <p>Type: PO Initiator: Document/Notification Id: Date Created From: Date Created To: Document Description: Organization Document Number: Purchase Order Type: Purchase Order #: 1760 Requisition #: Vendor #: ← Purchase Order Chart Code: Purchase Order Organization Code: Requestor Name: Assigned To User: Delivery Campus: Contract Manager: Previous Purchase Order #: Purchase Order Last Transmit Date From: Purchase Order Last Transmit Date To:</p> <p>Date Required From: Date Required To: Date Required Reason: Receiving Required: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both Payment Request Positive Approval Required: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both</p> <p>Purchase Order Status: INCOMPLETE STATUSES - Awaiting Budget Approval - Awaiting C & G Approval - Awaiting Commodity Code Approval - Awaiting New Unordered Item Review - Awaiting Purchasing Approval - Awaiting Tax Approval - Error occurred sending cxml</p> <p>Return Current Documents Only: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both Chart Code: Account Number: Organization Code: Ledger Document Type: Total Amount: Search Result Type: <input checked="" type="radio"/> Document Specific Data <input type="radio"/> Workflow Data Name this search (optional): <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/></p></div> Press the search button once you've entered your search criteria

Document/Notification Id	Document Description	Organization Document Number	Purchase Order Type	Purchase Order Type Description	Purchase Order #	Purchase Order Status Description	Contract Manager Name	Chart/Org	Vendor	University Fiscal Year	Type	Chart Code	Account Number	Organization Code	Ledger Document Type	Total Amount	Route
18000	ES - KFSI - 2389 Rabbits Sensitive Data		H	High Value PO (\$2,500.01+)	1760	Open	Diane Silver	IR-8035	CHARLES RIVER	2013	Purchase Order Amendment	IR	EP10086	8278	POA	1,776.01	
9123	ES - KFSI - 2389 Rabbits Sensitive Data		L	Low Value PO (\$0.00-\$2,500)	1760	Retired Version	Diane Silver	IR-8035	CHARLES RIVER	2013	Purchase Order	IR	EP10086	8278		351.01	

Notes

Lookups within Lookups

Select the lookup buttons next to select categories in order to be taken to another Lookup screen, which will return a certain value

Note: Select **Vendor #** to look up a vendor by name, in order to get the Vendor # and search PO based on Vendor