

## Quick Guide 3: Orders and Shipments

### iSupplier Portal

#### Orders

For each order issued by the authority:

- An email containing the Purchase Order will be sent to the PO email address on the portal.
- The contact selected by the authority during order approval is notified of a new order in their Notifications list.
- All supplier contacts can view all orders in the Orders tab.
- Note: PO Number (or Rev column on the PO screens) ends in 0 = original order, ends in 1 = 1<sup>st</sup> revision etc.

**View an order** - Click the 'Orders' tab:

- Enter the order number or other search criteria, or leave blank, and click 'Go';
- Click on the 'PO Number' link;
- Header details at the top, scroll down and click 'Show All Details' to view line details.

**Acknowledge an order** (this is not required for all orders);

- If required, the status will be 'Requires Acknowledgement';
- View the order (as above) to determine if you will accept or reject;

The screenshot shows the 'Purchase Orders' interface. At the top, there are navigation links for 'Purchase Orders', 'Purchase History', and 'RFQ'. Below this, the breadcrumb trail is 'Orders: Purchase Orders >'. The main heading is 'Standard Purchase Order: 321000233, 0 (Total GBP 77.50)'. The currency is set to 'GBP'. On the right, there is an 'Actions' dropdown menu with 'Acknowledge' selected, and 'Go' and 'Export' buttons. Below this is the 'Order Information' section with tabs for 'General', 'Terms and Conditions', and 'Summary'. The 'Summary' tab is active, showing a 'Total' of '77.50'.

- Use the 'Actions' drop down list to select 'Acknowledge', then click 'Go'.


The screenshot shows the 'Purchase Orders' interface after clicking 'Acknowledge'. The breadcrumb trail is 'Orders: Purchase Orders > View Order Details >'. The main heading is 'Acknowledge for Standard Purchase Order : 321000233,0 (Total GBP 77.50)'. The currency is 'GBP'. There are several action buttons: 'Cancel', 'Reject Entire Order', 'Accept Entire Order', 'Printable View', 'View Change History', and 'Export'. Below this is the 'Order Information' section with tabs for 'General Information', 'Terms and Conditions', and 'Related Information'. The 'General Information' tab is active, showing a 'Total' of '77.50' and 'Payment Terms' of 'IMMEDIATE'. The 'Related Information' tab is also visible, with links for 'Receipts' and 'Invoices'.

- Select 'Accept Entire Order' or 'Reject Entire Order'.
- You can add information, or a reason in the 'Note to Buyer'.

## Request a change to an order:

- Use the search facility to find the order to be changed;

Select Order:	Acknowledge	Request Cancellation	Request Changes	View Change History	Previous	1-25	Next 25				
Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	<a href="#">321000283</a>	1	Lancashire County Council OU	Standard PO		20-Feb-2013 10:26:52	GBP	164.90	Supplier Change Pending		
<input type="radio"/>	<a href="#">321000340</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 11:22:11	GBP	29.90	Accepted		
<input type="radio"/>	<a href="#">321000339</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 09:16:33	GBP	600.00	Open		
<input type="radio"/>	<a href="#">321000338</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 09:15:44	GBP	98.60	Open		

- Click the radio button  next to the order and click the 'Request Changes' button;

Details	Line	Type	Item/Job	Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global
<input type="checkbox"/> Hide	1	Goods				WASTE PAPER BINS	Each	10	2.99	29.90					Open	

Shipments	Shipment	Ship-To Location	Quantity Ordered	Quantity Received	Amount Received	Promised Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date
	1	TEST LOCATION	10		29.90		23-Feb-2013 00:00:00				

Additional Change Requests
If you need to submit more changes in addition to those that have been submitted above, you can specify them here
<input type="text"/>

Return to Orders: [Purchase Orders](#)

- Scroll down and make the changes required;

m	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Attachments	Reason
	WASTE PAPER BINS	Each	10	2.99	29.90					Open			<input type="text"/>

Amount	Received	Amount	Promised Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split	Reason	Action
	29.90			23-Feb-2013 00:00:00					Accepted			<input type="text"/>	<input type="text"/>

- Scroll across, enter the reason and select the Action 'Change';
- Click 'Submit'.
- The status will be 'Pending Change'. You are notified when the request is accepted or rejected.

## Request partial cancellation (e.g. a line within an order):

- Use the search facility to find the order containing the item to be cancelled;

Select Order:	Acknowledge	Request Cancellation	Request Changes	View Change History	Previous	1-25	Next 25				
Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	<a href="#">321000283</a>	1	Lancashire County Council OU	Standard PO		20-Feb-2013 10:26:52	GBP	164.90	Supplier Change Pending		
<input type="radio"/>	<a href="#">321000340</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 11:22:11	GBP	29.90	Accepted		

- Click the radio button next to the order and click 'Request Cancellation';

Details	Line	Type	Item	Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Sup
<a href="#">Show</a>	1	Goods				LARGE FLASK	Each	1	30	30.00					Open		
<a href="#">Show</a>	2	Goods				LARGE TEA POT	Each	1	20	20.00					Open		
<a href="#">Hide</a>	3	Goods				TEA SPOONS	Each	12	1	12.00					Open		

**Shipments**

Shipment	Ship-To Location	Quantity Ordered	Quantity Received	Amount Received	Promised Amount	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments
1	<a href="#">Lancashire County Council</a>	12	1		12.00	13-Nov-2012 00:00:00					Open	

- Scroll down and click the 'Show' link next to the line to be cancelled to view 'Shipments';

Item Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Delivered	Billed	Note to Supplier	Contractor Name	Status	Global Agreement	Supplier Config ID	Attachments	Reason
		LARGE FLASK	Each	1	30	30.00					Open				
		LARGE TEA POT	Each	1	20	20.00					Open				
		TEA SPOONS	Each	12	1	12.00					Open				

**Shipments**


Shipment	Quantity Ordered	Quantity Received	Amount Received	Promised Amount	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split	Reason	Action
1	12	1		12.00	13-Nov-2012 00:00:00					Open			OUT OF STOCK	Cancel

- Scroll across to the right of the screen;
- Enter the reason for cancellation against the appropriate line and select the Action 'Cancel';
- Click 'Submit'.
- The status will be 'Pending Change'. You are notified when the request is accepted or rejected.

## Request a cancellation for a full order:

- Use the search facility to find the order to be cancelled;

Select Order:		Acknowledge	Request Cancellation	Request Changes	View Change History	Previous 1-25		Next 25			
Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	<a href="#">321000283</a>	1	Lancashire County Council OU	Standard PO		20-Feb-2013 10:26:52	GBP	164.90	Supplier Change Pending		
<input type="radio"/>	<a href="#">321000340</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 11:22:11	GBP	29.90	Accepted		
<input type="radio"/>	<a href="#">321000339</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 09:16:33	GBP	600.00	Open		
<input type="radio"/>	<a href="#">321000338</a>	0	Lancashire County Council OU	Standard PO		16-Feb-2013 09:15:44	GBP	98.60	Open		

- Click the radio button  next to the order and click the 'Request Cancellation' button;

Orders: Purchase Orders >  
 Request Cancellation for Standard Purchase Order : 321000236,0 (Total GBP 62.00)  
 Currency=GBP

**Order Information**

General Information Terms and Conditions

- Click the 'Cancel Entire Order' button and acknowledge the message:

Orders: Purchase Orders > Request Cancellation for Standard Purchase Order >  
**Cancel Purchase Order 321000236**

Description **Cancel Line**  
 Currency **GBP**  
 Amount **62.00**  
 Order Date **31-Jan-2013 15:42:47**  
 Action **Cancel**

\* Reason for Cancellation

- Enter the reason for cancellation and click the 'Submit' button.
- The status will be 'Supplier Cancellation Pending' until the request is accepted or rejected.

## Shipments

### **View a shipment -**

- Click the 'Shipments' tab:
- Use the simple or advanced search to view delivery information, e.g.;
  - Search for deliveries due on or before a chosen date, or to a particular location;
  - Click the 'Go' button.

If you need further assistance please email the following address with your query:  
[isupplierqueries@lancashire.gov.uk](mailto:isupplierqueries@lancashire.gov.uk).