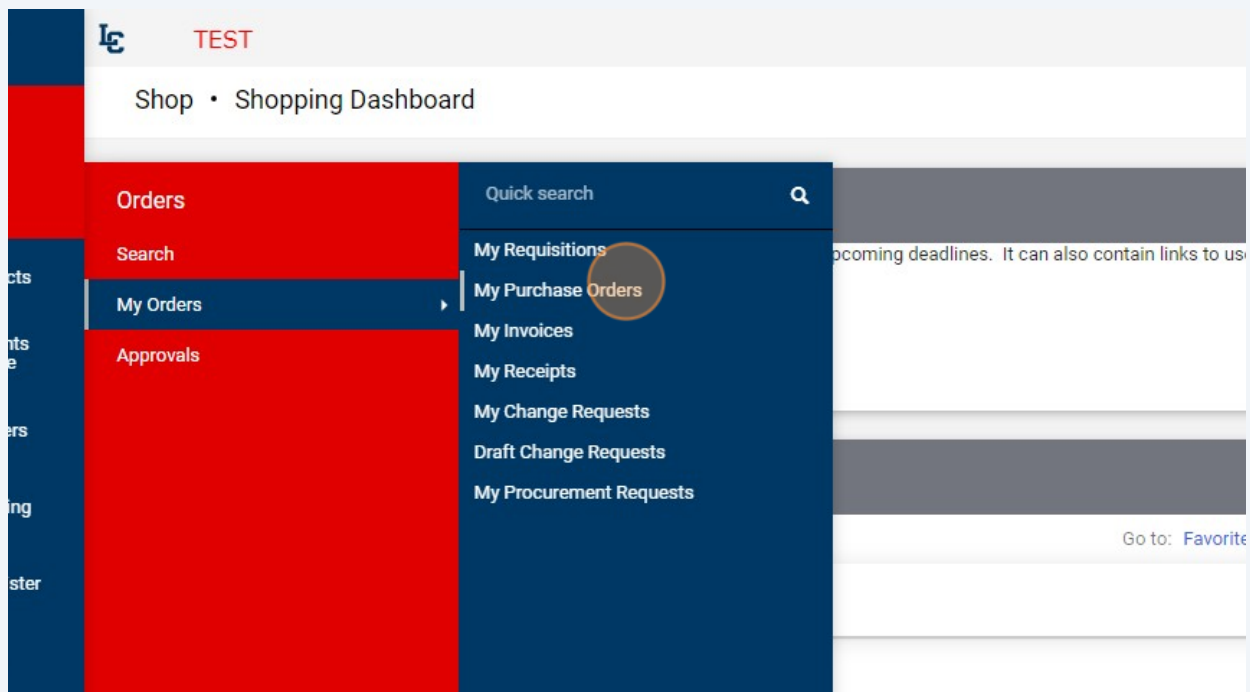


How to Check Purchase Order Receipt Status and Save a Favorite Search

1 Navigate to Jaggaer

2 From the left side menu, select "Orders", "My Orders" and click "My Purchase Orders"



3

Your Purchase Order queue will display. To edit the columns of data that are displayed, click on gear icon on the right side of the page.

PO Number	PO Owner	Shipment Status	Matching Status	Total Amount	Cost Center	Object Code	AP Status	Receipt Status
067	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD	905101	55720	Open	No Receipts
086	Jessica Waddington	Sent To Supplier	No Matches	1,231.20 USD	905101	55720	Open	No Receipts
086	Jessica Waddington	Sent To Supplier	No Matches	729.19 USD	905101	55720	Open	No Receipts

4

In the text field, type in "receipt".

Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...

Accounting Date

AP Status

Approval Actions

Approval Steps

Bank Code *

Bill To

Business Unit

PO Number

Supplier

Created Date/Time

PO Status

Requisition Number

PO Owner

Shipment Status

Pin Columns as my default

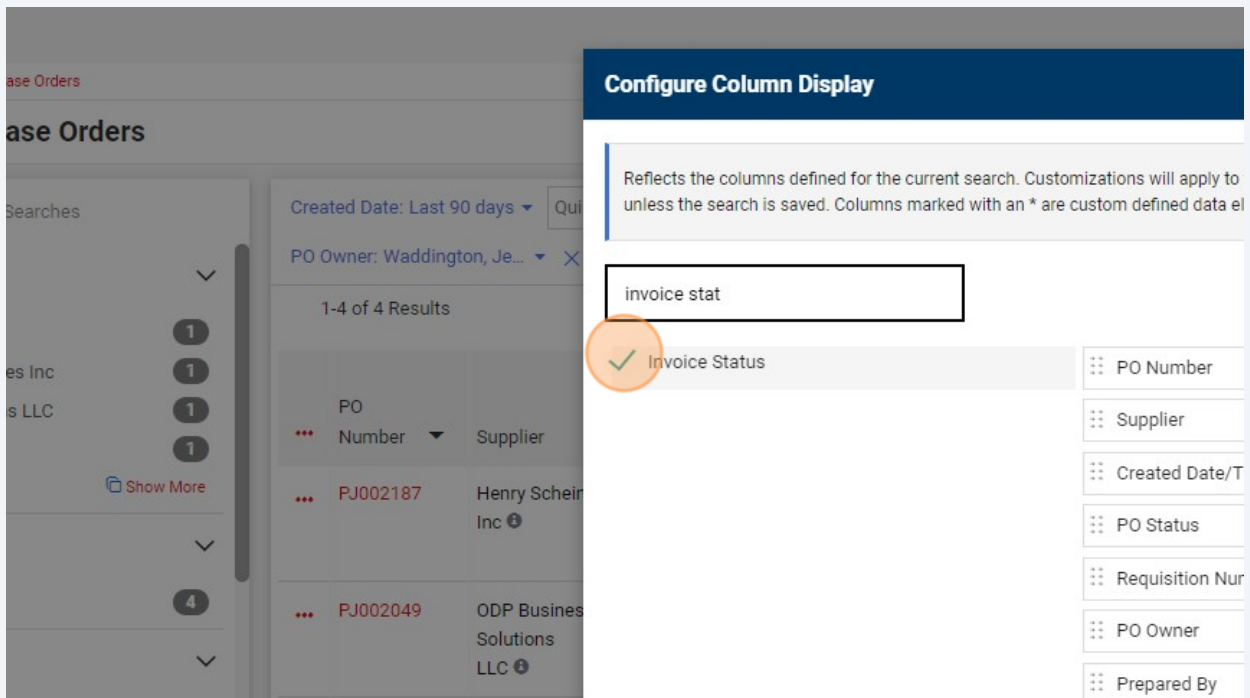
5 Click "Receipt Status"

The screenshot shows the 'My Purchase Orders' interface. A modal titled 'Configure Column Display' is open, showing a search box with the text 'receipt'. Below the search box, there are two options: 'Receipt Number' (unchecked) and 'Receipt Status' (checked with a green checkmark). To the right of these options is a list of available columns: PO Number, Supplier, Created Date/, PO Status, Requisition N, PO Owner, Shipment Sta, and Matching Stat.

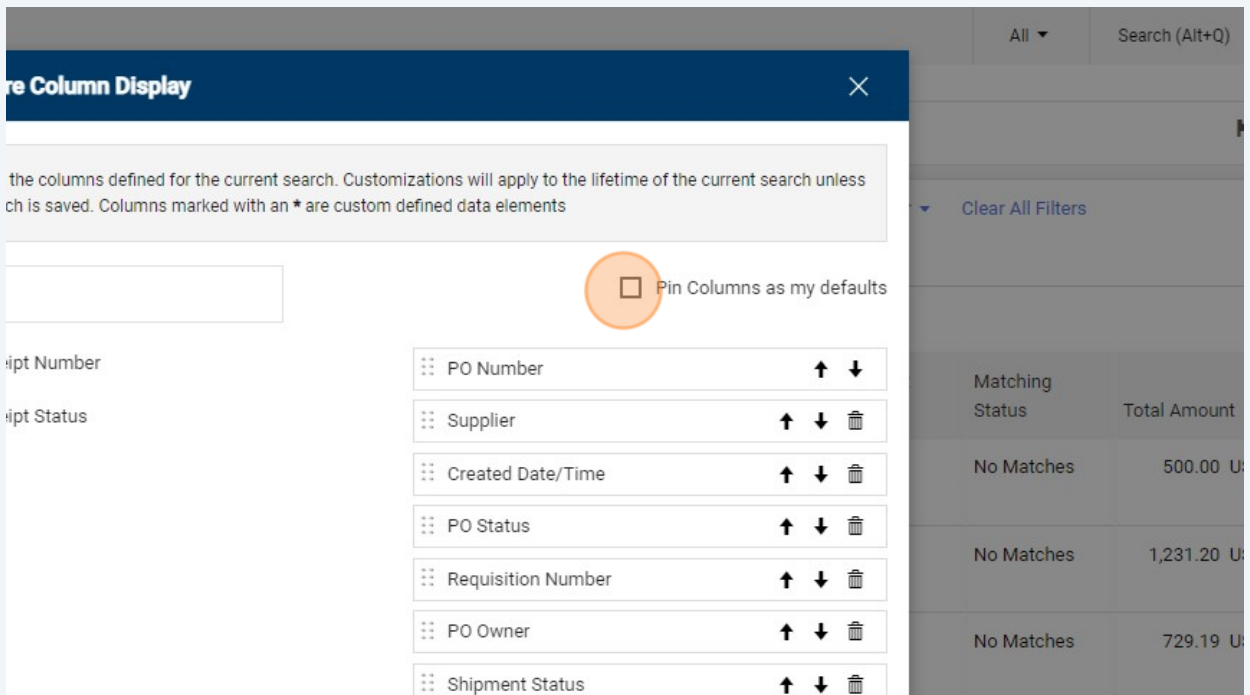
6 Click the "Type to Filter Available Columns..." field.

The screenshot shows the 'My Purchase Orders' interface. A modal titled 'Configure Column Display' is open, showing a search box with the text 'Type to Filter Available Columns...'. Below the search box, there are several options: Accounting Date, AP Status (checked with a green checkmark), Approval Actions, Approval Steps, Bank Code *, Bill To, and Business Unit. To the right of these options is a list of available columns: PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, and Prepared By.

7 Click "Invoice Status"



8 Click "Pin Columns as my defaults". This will save the column layout.



9 Click "Apply"

The screenshot shows a filter menu with the following options: Shipment Status, Matching Status, Total Amount, Cost Center *, Object Code *, AP Status, and Receipt Status. Each option has up/down arrows and a trash icon. The 'Apply' button is circled in orange. Below the menu, a table shows purchase order items with columns for date, status, amount, PO owner, and supplier.

Date	Status	Amount	PO Owner	Supplier	Match Status	Amount
4/28/2023 9:40:30 AM	Pending	3749831	Jessica Waddington	Sent To Supplier	No Matches	250.00 USD
4/27/2023 9:30:48 AM	Pending	3604123	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD

10 The Purchase Order queue now shows the Receipt Status column.

The screenshot shows a Purchase Order queue table with the following columns: PO Number, PO Owner, Shipment Status, Matching Status, Total Amount, Cost Center, Object Code, AP Status, and Receipt Status. The 'Receipt Status' column is circled in orange. The table contains four rows of purchase order data.

PO Number	PO Owner	Shipment Status	Matching Status	Total Amount	Cost Center	Object Code	AP Status	Receipt Status
1067	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD	905101	55720	Open	No Receipts
1086	Jessica Waddington	Sent To Supplier	No Matches	1,231.20 USD	905101	55720	Open	No Receipts
1086	Jessica Waddington	Sent To Supplier	No Matches	729.19 USD	905101	55720	Open	No Receipts
1030	Jessica Waddington	Sent To Supplier	No Matches	250.00 USD	905101	55720	Open	No Receipts

11 The Purchase Order queue now shows the Invoice Status column.

Save As Pin Filters Export All

Search Add Filter Clear All Filters ?

100 Per Page

Payment Status	Matching Status	Total Amount	Cost Center	Object Code	Current Workflow Step	AP Status	Receipt Status	Invoice Number	Invoice Total	Invoice Pay Status	Invoice Status
Payment	Fully Matched	4,931.92 USD	973902	55720	-	Closed	No Receipts	D00001678	4,931.92 USD	Paid	Fully Invoiced
Item To Supplier	No Matches	97.89 USD	905101	55720	-	Open	No Receipts	-	0.00 USD	No Pay Status	No Invoices
Payment	Fully Matched	88.32 USD	975901	55720	-	Closed	No Receipts	D00001514	88.32 USD	Paid	Fully Invoiced



Note: Payment Request, Check Request and Team Travel Advance Request (Athletics) PO's do not require a receipt.

12

In the left side Quick Filters menu, navigate to the Form Type section and click "Show More".

The screenshot shows the 'Administer Setup' interface. On the left, there are two main sections: 'Form Type' and 'Invoice Pay Status'. Under 'Form Type', there are three options: 'No Form Types' (135), 'Check Request' (34), and 'General' (21). The 'General' option is highlighted with an orange circle, and a 'Show More' button next to it is also circled in orange. Below 'Form Type' is the 'Invoice Pay Status' section with options 'No Pay Status' (144), 'Open' (39), and 'Paid' (7). At the bottom, there is an 'Item Type' section. On the right side of the screen, a table displays a list of purchase orders with columns for ID, Vendor Name, and Date.

ID	Vendor Name	Date
PJ000641	NW Engraving Services LLC	5/11/2023
PJ000640	Hahn Supply	5/11/2023
PJ000639	ODP Business Solutions LLC	5/11/2023
PJ000638	Dell Marketing LP	5/11/2023
PJ000637	B & H Photo	5/11/2023
PJ000636	Happy Day Catering	5/11/2023
PJ000635	Amazon Capital Services Inc	5/11/2023
PJ000634	Staples Inc	5/3/2023

13

Click "General"

The screenshot shows the 'Purchase Orders' list with a 'Form Type Quick Filter' modal open. The modal has a title 'Form Type Quick Filter' and a 'Select All' option. Below it, there are three options with checkboxes: 'Check Request (34)', 'General (21)', and 'No Form Types (135)'. The 'General (21)' option is highlighted with an orange circle. The background shows a list of purchase orders with columns for PO Number, Vendor Name, Date, Status, and Amount.

PO Number	Vendor Name	Date	Status	Amount
PJ000643				
PJ000642	Staples Inc	5/12/2023 11:40:18 AM	Pending	3774273
PJ000641	NW Engraving Services LLC	5/11/2023 2:33:30 PM	Completed	3772628
PJ000640	Hahn Supply	5/11/2023 2:17:07 PM	Completed	3772625

14 Click "No Form Types"

The screenshot shows a 'Form Type Quick Filter' dialog box overlaid on a purchase order list. The dialog has a dark blue header and a white body. It contains a 'Select All' link in red, followed by three options: 'Check Request (34)' with an unchecked checkbox, 'General (21)' with a checked checkbox and a green checkmark, and 'No Form Types (135)' with an unchecked checkbox. The 'No Form Types (135)' option is circled in orange. The background shows a table of purchase orders with columns for PO Number, Supplier, Date, Status, and Amount.

PO Number	Supplier	Date	Status	Amount
PJ000643				
PJ000642	Staples Inc	5/12/2023 11:40:18 AM	Pending	3774273
PJ000641	NW Engraving Services LLC	5/11/2023 2:33:30 PM	Completed	3772628
PJ000640	Hahn Supply	5/11/2023 2:17:07 PM	Completed	3772625

15 Click "Apply"

The screenshot shows the 'Form Type Quick Filter' dialog box with the 'Apply' button circled in orange. The dialog is positioned over a table of purchase orders. The table has columns for Date, Status, Amount, Supplier, and Matching Status. The 'Apply' button is a dark blue rectangle with white text, and the 'Cancel' button is a light gray rectangle with dark text.

Date	Status	Amount	Supplier	Matching Status
5/12/2023 11:40:18 AM	Pending	3774273	Diana Higgins	No Matches
5/11/2023 2:33:30 PM	Completed	3772628	Diana Higgins	No Matches
5/11/2023 2:17:07 PM	Completed	3772625	Diana Higgins	No Matches
5/11/2023 2:09:31 PM	Completed	3772606	Diana Higgins	No Matches



To further filter the My Purchase Order queue results, you can select a date range and filter to only see the PO's with no or partial receipts entered yet.

16 Adjust the Created Date filter if desired.

TEST

Search Purchase Orders

My Purchase Orders

Filters My Searches

ier

Engraving Services LLC

26

Washing Window LLC

9

J. Swift-Raymond

8

Concrete LLC

7

Fire Protection Inc

6

More

Show More

atus

leted

93

ing

19

Created Date: Last 90 days

Quick search

PO Owner: Waddington, Je...

Page 1 of 6 1-20 of 112 Results

PO Number	Supplier	Created Date/Time	PO Status	Requis Numb
PJ000643	NW Engraving Services LLC	5/16/2023 11:16:53 AM	Completed	37752
PJ000638	Dell Marketing LP	5/11/2023 1:39:26 PM	Completed	37705
PJ000637	B & H Photo	5/11/2023 1:39:26 PM	Completed	37705

17 You can select "All" or a specific date range.

The screenshot shows the 'My Purchase Orders' interface. On the left, there are filters for 'Supplier' and 'PO Status'. The 'Supplier' filter lists: NW Engraving Services LLC (26), Palmers Window Washing LLC (9), Vikki J. Swift-Raymond (8), Knox Concrete LLC (7), and Patriot Fire Protection Inc (6). The 'PO Status' filter lists: Completed (93) and Pending (19). The main area has a 'Created Date' filter set to 'Last 90 days' and a 'Quick search' field. Below the filters is a table of purchase orders:

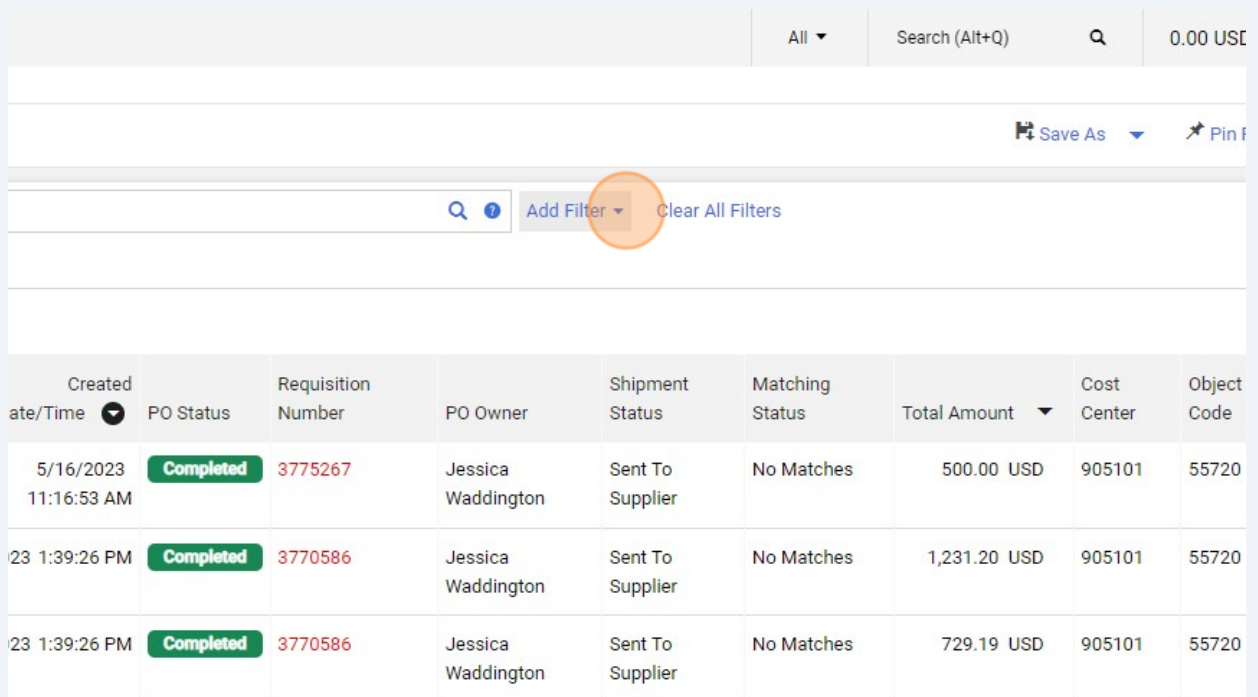
PO Number	Supplier	Created Date
PJ000638	Dell Marketing LP	5/11/2023 1:39:26 PM
PJ000637	B & H Photo	5/11/2023 1:39:26 PM

18 Click "Apply"

This screenshot is similar to the previous one but highlights the 'Apply' button in the filter dialog. The filter dialog is open, showing the 'All' radio button selected. The 'Apply' button is circled in orange. The table below shows more purchase orders:

PO Number	Supplier	Created Date	Status	Requisition Number	PO Owner
PJ000638	Dell Marketing LP	5/11/2023 1:39:26 PM	Completed	3775267	Jessica Waddington
PJ000637	B & H Photo	5/11/2023 1:39:26 PM	Completed	3770586	Jessica Waddington
PJ000636	Happy Day Catering	5/11/2023 1:13:48 PM	Pending	3765630	Jessica Waddington
PJ000634	Staples Inc	5/3/2023 10:51:57 AM	Pending	3765616	Jessica Waddington

19 Add a filter, to see only the PO's that still need a receipt. Click on Add Filter.



The screenshot shows a web interface for a Purchase Order (PO) list. At the top, there is a search bar with the text "Search (Alt+Q)" and a magnifying glass icon. To the right of the search bar, it displays "0.00 USD". Below the search bar, there are two buttons: "Save As" and "Pin". In the center of the interface, there is a filter control area with a search icon, a question mark icon, and two buttons: "Add Filter" (highlighted with an orange circle) and "Clear All Filters". Below this is a table with the following columns: "Created Date/Time", "PO Status", "Requisition Number", "PO Owner", "Shipment Status", "Matching Status", "Total Amount", "Cost Center", and "Object Code". The table contains three rows of data, all with a "Completed" status.

Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount	Cost Center	Object Code
5/16/2023 11:16:53 AM	Completed	3775267	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD	905101	55720
23 1:39:26 PM	Completed	3770586	Jessica Waddington	Sent To Supplier	No Matches	1,231.20 USD	905101	55720
23 1:39:26 PM	Completed	3770586	Jessica Waddington	Sent To Supplier	No Matches	729.19 USD	905101	55720

20 Type "receipt"

21 Click "Receipt Status"

The screenshot shows a table of purchase orders with the following columns: Created Date/Time, PO Status, Requisition Number, PO Owner, Supplier, Receipt Status, Total Amount, and Cost Center. A filter dropdown menu is open over the 'Receipt Status' column, showing the search term 'receipt' and three options: 'Receipt Name', 'Receipt Number', and 'Receipt Status'. The 'Receipt Status' option is highlighted with an orange circle.

Created Date/Time	PO Status	Requisition Number	PO Owner	Supplier	Receipt Status	Total Amount	Cost Center
5/16/2023 11:16:53 AM	Completed	3775267	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD	905101
5/11/2023 1:39:26 PM	Completed	3770586	Jessica Waddington	Sent To Supplier	No Matches	1,231.20 USD	905101
5/11/2023 1:39:26 PM	Completed	3770586	Jessica Waddington	Sent To Supplier	No Matches	729.19 USD	905101
5/11/2023 1:13:48 PM	Pending	3765630	Jessica Waddington	Sent To Supplier	No Matches	250.00 USD	905101

22 Click "No Receipts"

The screenshot shows a table of purchase orders with the following columns: PO Number, Supplier, Receipt Status, and Requisition Number. A filter dropdown menu is open over the 'Receipt Status' column, showing the search term 'No Receipts' and four options: 'Fully Received', 'No Receipts', 'Over Received', and 'Partially Received'. The 'No Receipts' option is highlighted with an orange circle.

PO Number	Supplier	Receipt Status	Requisition Number
PJ000643	NW Engraving LLC	Completed	3775267
PJ000638	Dell Marketing LP	Completed	3770586
PJ000637	B & H Photo	Completed	3770586

23 Click "Partially Received"

Purchase Orders

Purchase Orders (Modified)

My Searches

Created Date: All Quick search

PO Owner: Waddington, Je... Receipt Status: All

Page 1 of 19

PO Number	Supplier	Status	Requisition Number
PJ000643	NW Engraving LLC	Completed	3775267
PJ000638	Dell Marketing LP	Completed	3770586
PJ000637	B & H Photo	Completed	3770586
PJ000636	Happy Day Catering	Pending	3765630

Fully Received
 No Receipts
 Over Received
 Partially Received

Apply Cancel

24 Click "Apply"

(modified)

Created Date: All Quick search Add Filter

PO Owner: Waddington, Je... Receipt Status: All

Page 1 of 19

PO Number	Supplier	Status	Requisition Number	PO Owner
PJ000643	NW Engraving LLC	Completed	3775267	Jessica Waddington
PJ000638	Dell Marketing LP	Completed	3770586	Jessica Waddington
PJ000637	B & H Photo	Completed	3770586	Jessica Waddington
PJ000636	Happy Day Catering	Pending	3765630	Jessica Waddington
PJ000634	Staples Inc	Pending	3765616	Jessica

Fully Received
 No Receipts
 Over Received
 Partially Received

Apply Cancel

25

The PO queue will now display only the PO's in the date range selected and with a no or partial receipt status.



Tip! Save this search for easy access later.

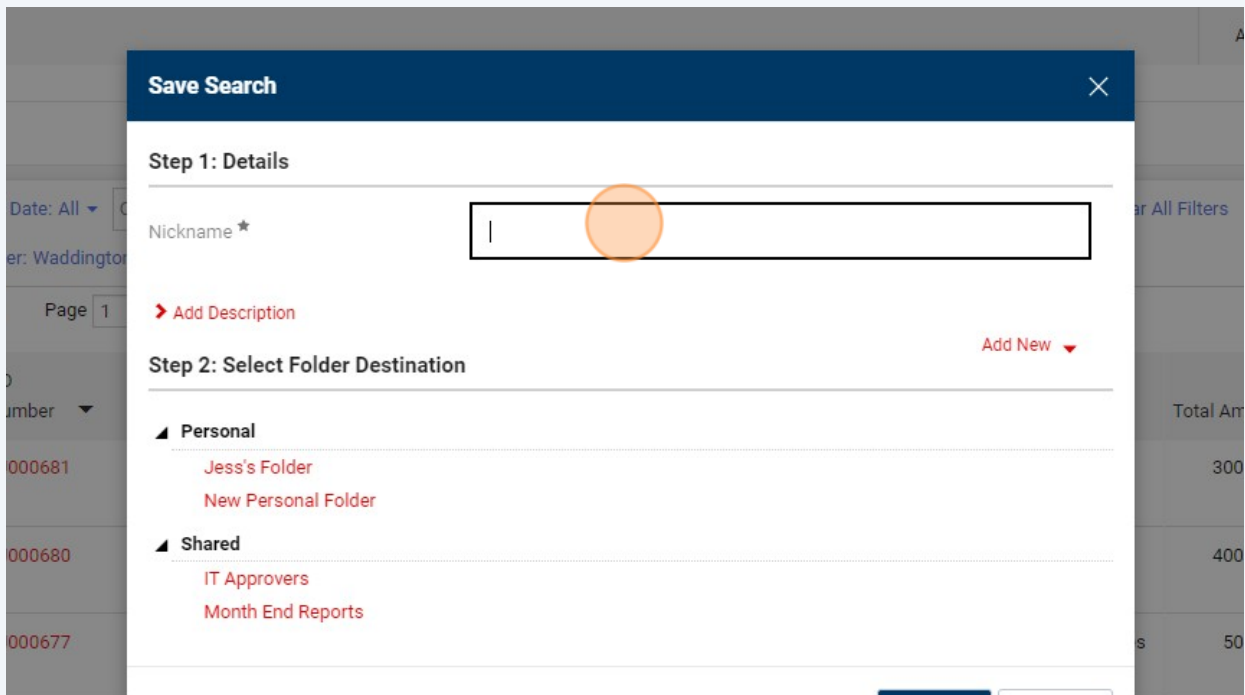
26

Click "Save As"

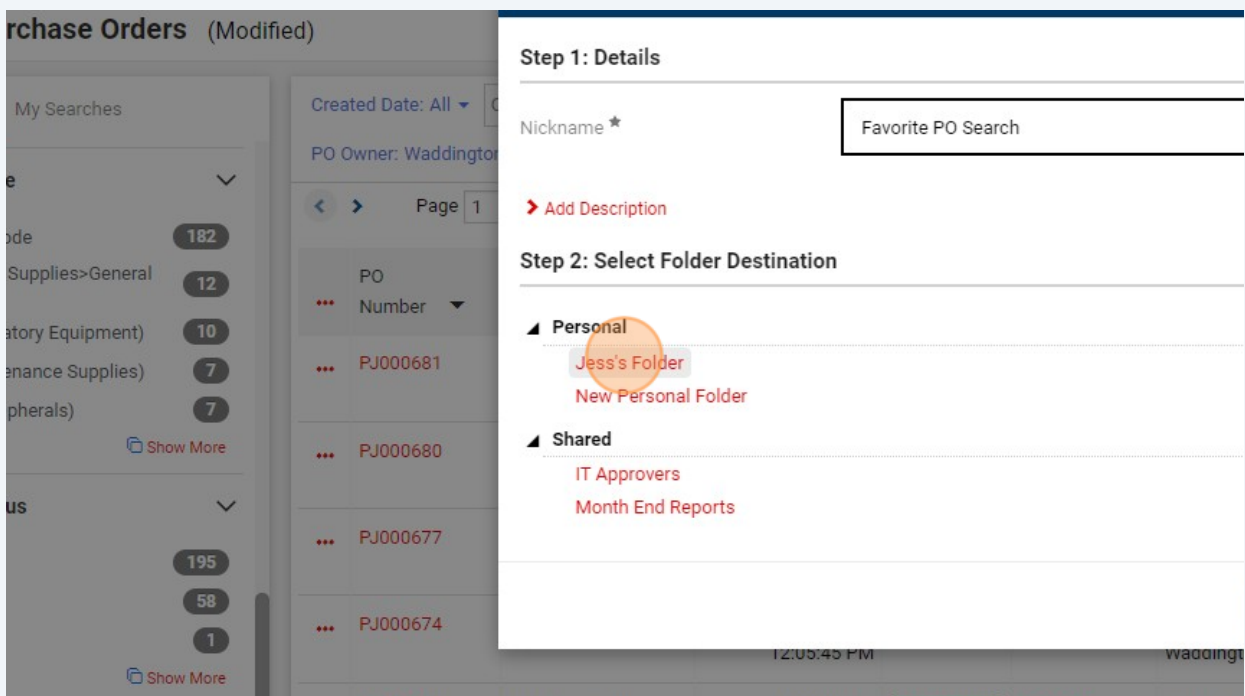
The screenshot shows a web application interface for a PO queue. At the top, there is a navigation bar with a search bar, currency (0.00 USD), and notification icons. Below the navigation bar, there are action buttons: 'Save As' (highlighted with an orange circle), 'Pin Filters', and 'Export All'. A tooltip 'Save As Additional options' is visible over the 'Save As' button. Below the buttons, there is a filter section with 'Add Filter' and 'Clear All Filters' options. The main content is a table with the following data:

PO Owner	Shipment Status	Matching Status	Total Amount	Cost Center	Object Code	Receipt Status	Invoice Status	Invoice Pay Status	AP Status
Jessica Waddington	Sent To Supplier	Fully Matched	300.00 USD	905101	55199	Partially Received	Partially Invoiced	Open	Closed
Jessica Waddington	Sent To Supplier	Fully Matched	400.00 USD	905101	55199	Partially Received	Partially Invoiced	Open	Open
Jessica Waddington	Sent To Supplier	No Matches	50.00 USD	905101	55720	No Receipts	No Invoices	No Pay Status	Open

27 Add a name in the Nickname field.

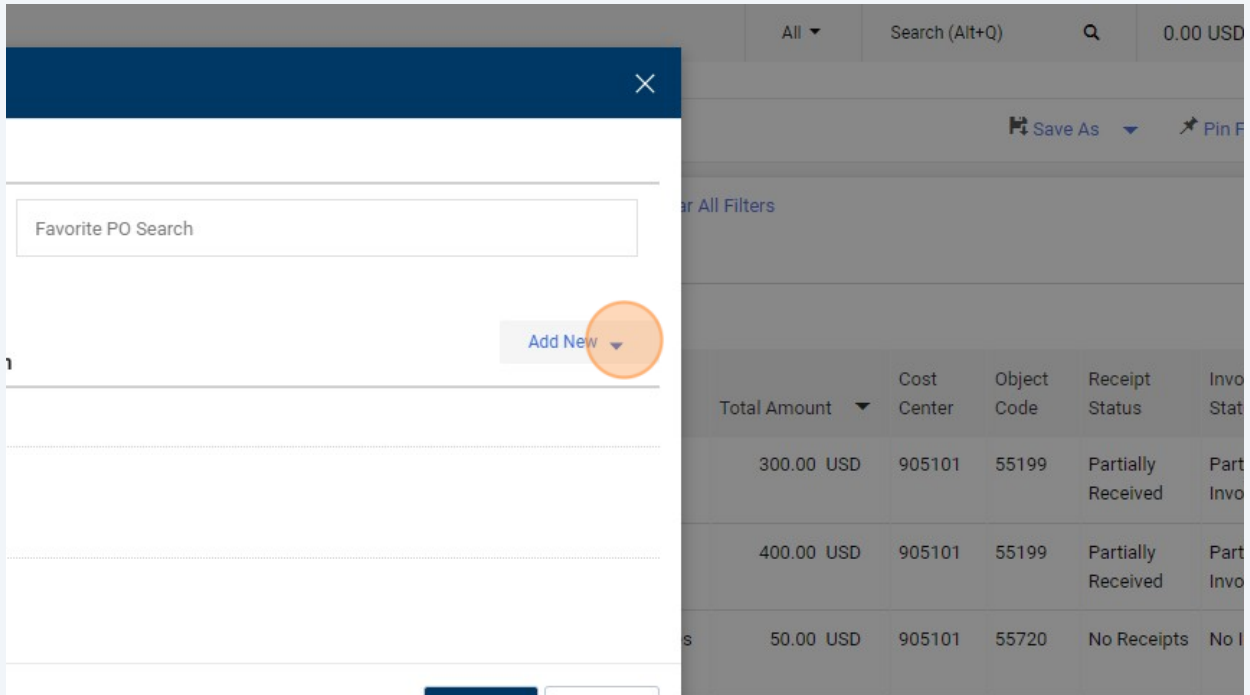


28 Select a Personal Folder to save the search to



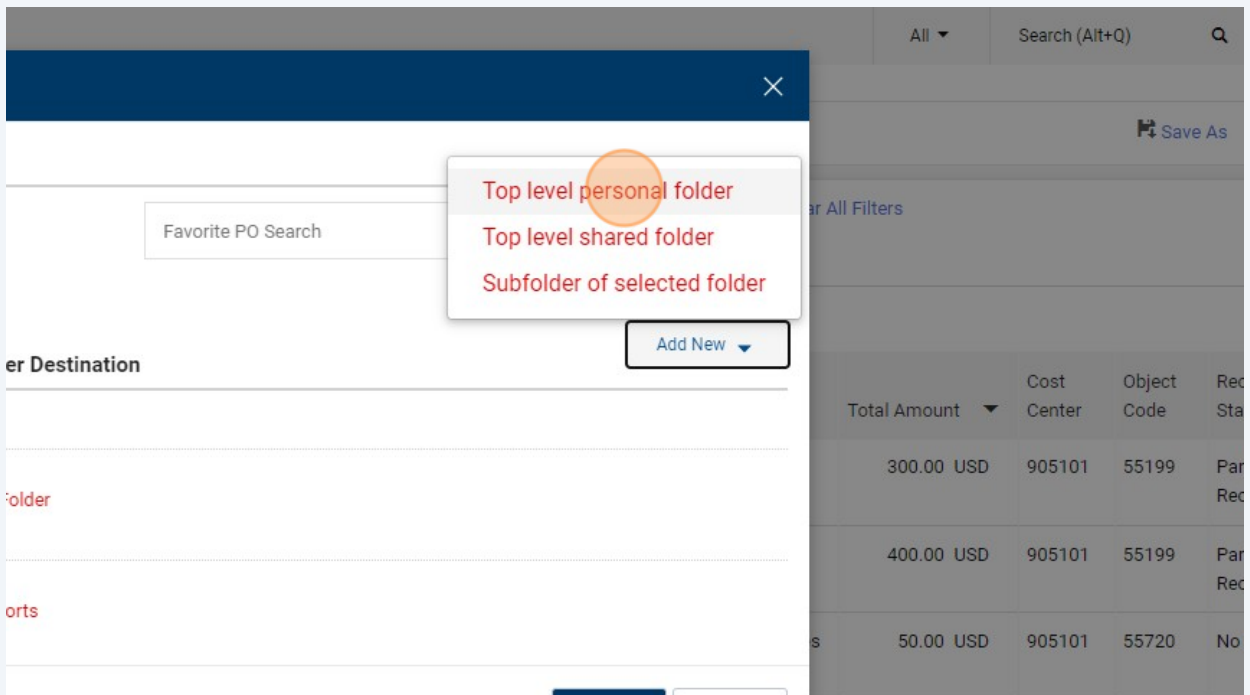
29

If you have not created a personal folder before, click the Add New button to create one.



30

Click "Top level personal folder"



31 Create a name for your personal folder and click "Save Changes"

The screenshot shows a modal form for creating a folder. The form has the following fields:

- Name ***: A text input field containing "Favorite Folder".
- Description**: A text area with a "254 characters remaining" indicator.
- Buttons**: "Save Changes" (highlighted with an orange circle) and "Close".

The background interface shows a list of folders under "Personal" and "Shared" categories. The "Personal" category includes "Jess's F" and "New Pe". The "Shared" category includes "IT Approvers" and "Month End Reports".

Total Amount	Center	Code	
300.00 USD	905101	55199	F
400.00 USD	905101	55199	F
50.00 USD	905101	55720	M
750.00 USD	905101	55720	M
500.00 USD	905101	55720	M

Date	Status	Reference	Name	Action	Match	Amount	Center	Code	
6/22/2023 10:03:48 AM	Completed	3799795	Jessica Waddington	Sent To Supplier	No Matches	500.00 USD	905101	55720	M
6/20/2023 12:05:42 PM	Completed	3796891	Jessica Waddington	Sent To Supplier	No Matches	1,200.00 USD	905101	55720	F
6/20/2023 11:29:10 AM	Completed	3796847	Jessica Waddington	Sent To Supplier	Partially Matched	1,200.00 USD	905101	55720	F
6/13/2023	Completed	3792161	Jessica	Sent To	No Matches	109.00 USD	905101	55720	M

32 Click "Save"

The screenshot shows the same modal form as in step 31, but the "Save" button is now highlighted with an orange circle. The background interface is the same as in step 31.

33 Your search has been saved. To access your saved search, follow the next steps.

34 Navigate to Orders, My Orders and click "My Purchase Orders"

The screenshot shows a web application interface with a dark blue sidebar on the left containing navigation items: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area has a breadcrumb trail: Orders > Search > Purchase Orders. Below the breadcrumb is a section titled "Favorite PO Search" with a hamburger menu icon. A dropdown menu is open, listing several options: Quick search, My Requisitions, My Purchase Orders (highlighted with a red circle), My Invoices, My Receipts, My Change Requests, Draft Change Requests, and My Procurement Requests. The background shows a table of purchase orders with columns for Supplier, Date/Time, and PO S.

	Created Date/Time	PO S
Mewes	7/12/2023 9:42:37 AM	Co
Mewes	7/12/2023 9:36:07 AM	Pe
Concrete LLC	7/7/2023 12:06:45 PM	Co

35 Click "My Searches"

TEST

Orders > Search > Purchase Orders

My Purchase Orders

Quick Filters: **My Searches**

Created Date: Last 90 days Quick search

PO Owner: Waddington, Je... X

Page 1 of 2 1-20 of 30 Results

PO Number	Supplier	Create Date/Time
PJ000681	Allen N. Mewes	7/12/2023 9:42:37 AM
PJ000680	Allen N. Mewes	7/12/2023 9:36:07 AM
PJ000677	Knox Concrete LLC	7/7/2023 12:06:45 PM

36 Select your search.

Suppliers

Reporting

Administer

Setup

Favorite Searches

- 905101 Search
- Cost Center 881101 Search
- Fave Search
- Favorite PO Search
- ICP Request Search
- ICP Request Search 1
- Marty's Cost Center Search
- My Fave search**

PO Number	Supplier	Create Date/Time
PJ000681	Allen N. Mewes	7/12/2023 9:42:37 AM
PJ000680	Allen N. Mewes	7/12/2023 9:36:07 AM
PJ000677	Knox Concrete LLC	7/7/2023 12:06:45 PM
PJ000674	HP Inc	7/7/2023 12:05:45 PM
PJ000665	NW Engraving Services LLC	6/22/2023 10:03:48 AM
PJ000662	Diana L. Higgins	6/20/2023 12:05:42 PM
PJ000661	Diana L. Higgins	6/20/2023 11:29:10 AM