



CLEVELAND METROPOLITAN SCHOOL DISTRICT

SUPPLIER SELF SERVICE GUIDE

CMSD PROCUREMENT/PURCHASING DEPARTMENT



JULY 2018

The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.



Contact us:



216.838.0410



SupplierSelfService@clevelandmetroschools.org



Supplier Self Service Portal Overview

The CMSD Supplier Self Service Portal is a free internet accessible Workday enabled self-service tool that allows suppliers to directly access their information during the “procure-to-pay” lifecycle. The portal is available to all CMSD approved suppliers who are registered to use the service.

The Supplier Self Service portal offers the ability to:

- Self-register through an external website
- Receive newly issued purchase orders
- View purchase orders
- Access payment and remittance advice information
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon)
- Upload catalogs (coming soon)

In addition to the benefits above, the portal is available 24/7 and provides real-time access to invoice and purchase order information.

Effective, August 2018, CMSD will require all approved Suppliers to register and use the Supplier Self Service portal to conduct business with CMSD.

If you are approved and registered, you should have received your login credentials. If you are registered and have not received your login credentials, please contact us at SupplierSelfService@clevelandmetroschools.org.

To get answers to our most frequently asked questions (FAQs) and review our Supplier Self Service Fact Sheet, visit our Supplier Self Service web page at <http://clevelandmetroschools.org/Domain/120>. Select Supplier Self Service from the menu on the left.

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Supplier Self Service Web Site

Website address: <http://clevelandmetroschools.org/Page/13414>

PROCUREMENT / PURCHASING

Welcome to the Cleveland Metropolitan School District (CMSD) Supplier Self Service Web Page.

The Supplier Self-Service portal creates a higher level of connectivity for an integrated flow of information between CMSD and our Suppliers.



Cleveland Metropolitan School District (CMSD) CMSD Supplier Self Service Portal Supplier Partners

This secure self-service tool offers you the ability to:

- Self-register through an external website.
- View purchase orders.
- Access payment and remittance advice information.
- Maintain master data such as contact information, addresses, and bank accounts.
- Create invoices (coming soon).
- Upload catalogs (coming soon).

| START HERE ▼ | |
|--|--|
| Existing Supplier Only | New Supplier Only |
| Update Contact Information | Register as a New Supplier (Coming Soon) |
| Supplier Self-Service Portal | |

Terms of Use & Disclaimer

CMSD Supplier Fact Sheet

Frequently Asked Questions
Supplier Self Service Frequently Asked Questions

Contact us:

SupplierSelfService@clevelandmetroschools.org

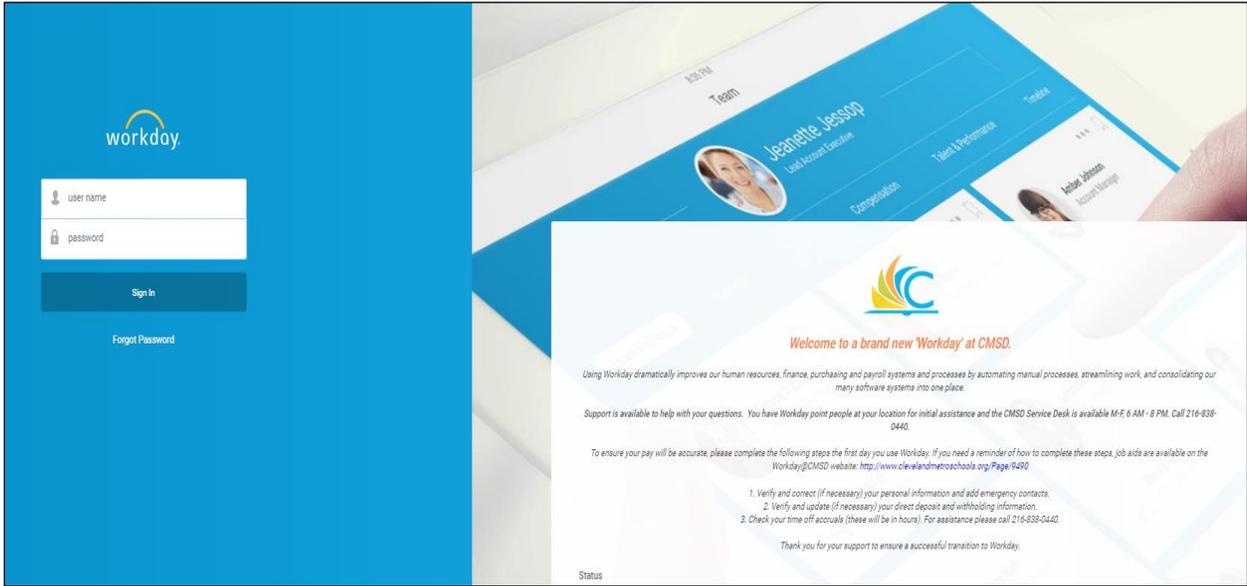
216.838.0410

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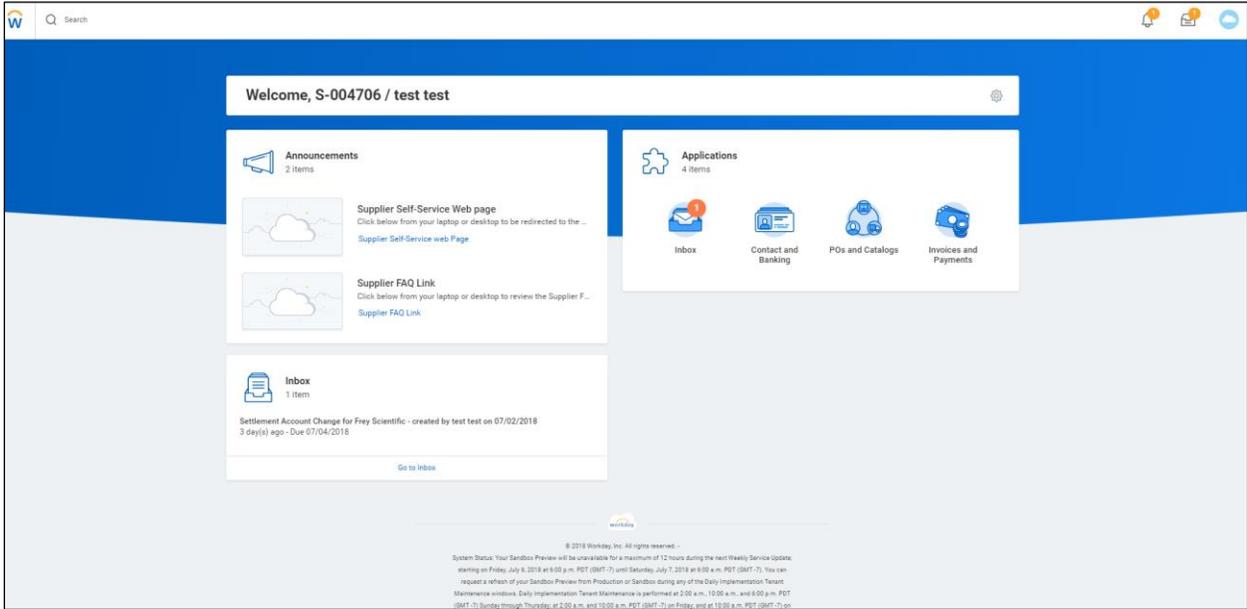
Version: Rev1

Supplier Self Service Portal Login Page

You may access the Self Service Portal using the link in the email from CMSD.



Supplier Self Service Portal Home Page



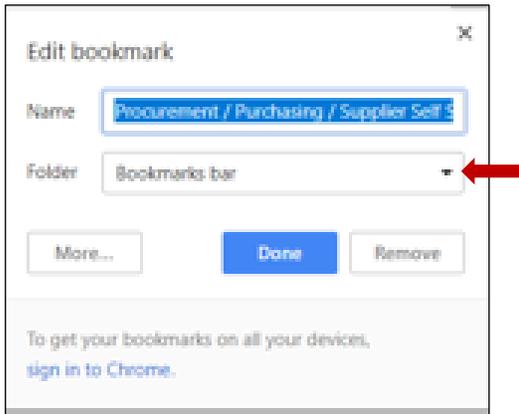
Bookmark a Webpage

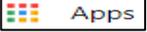
Follow the steps below to bookmark the Supplier Self Service webpage and the CMSD Supplier Portal login page.

INSTRUCTIONS

NOTE: To bookmark a webpage, make sure you are on the open webpage

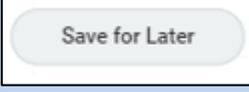
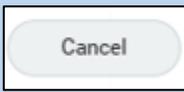
- Click  in the upper right corner of the screen. Scroll down and click **Bookmarks**.
- Click **Bookmark this page** to display the **Edit Bookmark** box (see below)



- Type **the name of the webpage you want to bookmark** next to name
- Click the ▼ on the right of **Folder** and click Bookmark Bar or select a folder you've created
- If you chose Bookmark Bar, the bookmarked page will appear on the same row as  or in your designated folder.
- If you have many items on your Bookmark Bar, you may need to scroll right using the  in the top right of the screen.

Self Service Portal Tools

| | |
|---|--|
|  | Perform document search |
|  | Notifications to take action |
|  | Configure the page you're viewing or refresh information |
|  | Filter information on the report |
|  | Select Column preference for report |
|  | Create/expand/collapse chart |
|  | Displays additional actions/details |
|  | Scroll left or right |
|  | Scroll up or down |
|  | Inbox |

| | |
|--|--|
|  | Return to the homepage |
|  | Preference menu/sign out option |
|  | Return toggle to normal view |
|  | Toggle to full screen view |
|  | Print document |
|  | Export to Excel |
|  | Configure/view chart |
|  | Search menu options |
|   | Accept the transaction or entry and proceed to the next step |
|  | Save the current entries to allow updates later |
|  | Cancel the transaction or entry |

Inbox Application

Purpose: The purpose of this Application is to enable suppliers to receive Workday messages, actions items and view archived transactions that have been completed within the Inbox.

How to Access: The inbox can be accessed from the Workday homepage.

Audience: CMSD Approved Suppliers

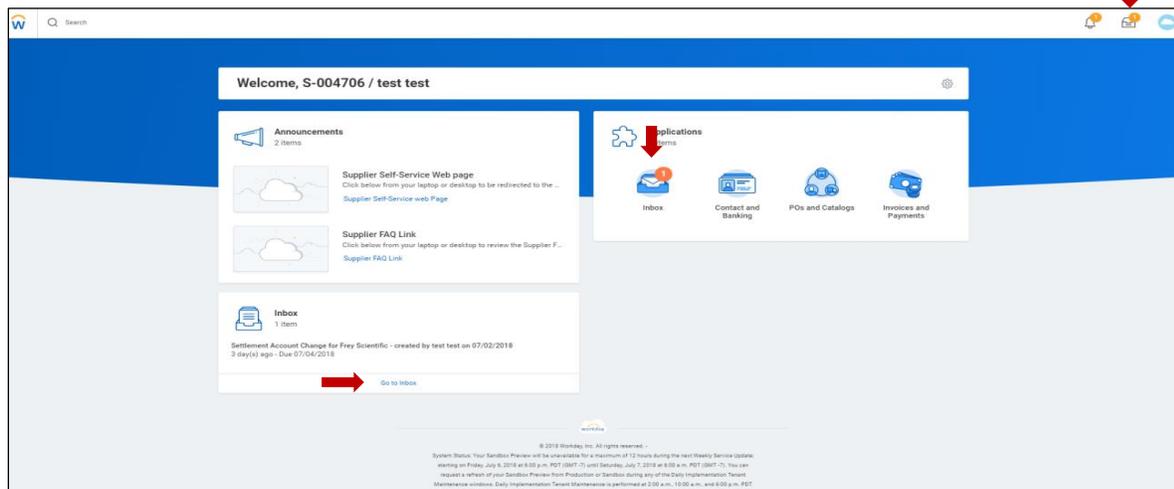
Helpful Hints: You will need to be registered as a CMSD Supplier and have access credentials in order to log in to the Supplier Portal.

Procedure: Complete the following steps to understand the use of the Inbox application and the different Dashboards.

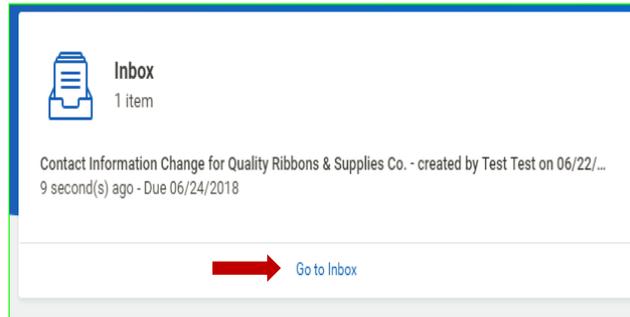
The homepage offers three ways to access the inbox.

1. On the bottom of the left side of the screen. Messages can be accessed by clicking .
2. On the right side of the screen under Applications .
3. On the top right side of the screen .

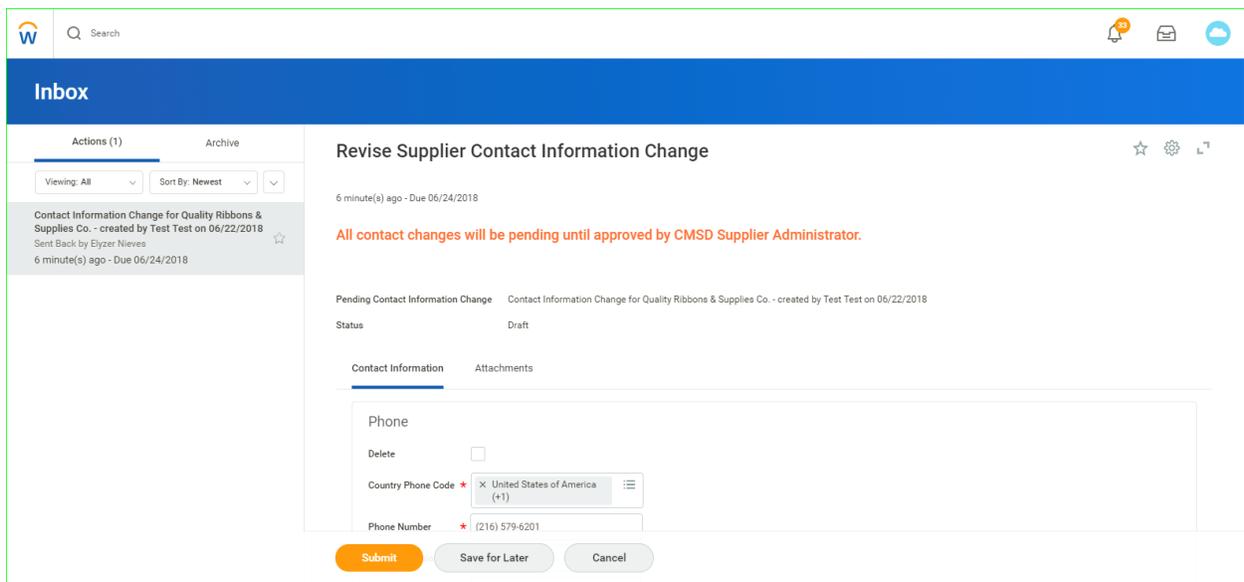
These options are shown on the next page.



The inbox on the left side of the screen will show the 3 most current messages. These messages are designed to alert you that action is needed on pending transactions. See below.

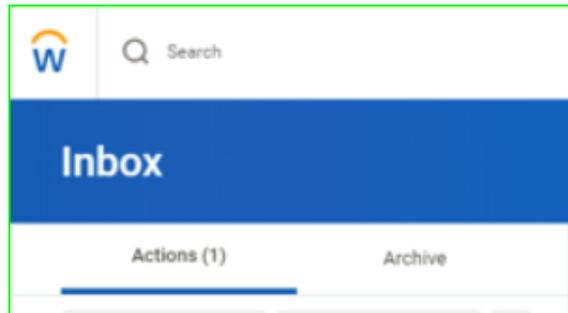


Click [Go to Inbox](#) to review pending items. As shown in the next illustration, Action and Archive items will be displayed. To view the details, click the Action or Archive tab.



Helpful Hint: You can also use the  or  icons to open the Inbox page below.

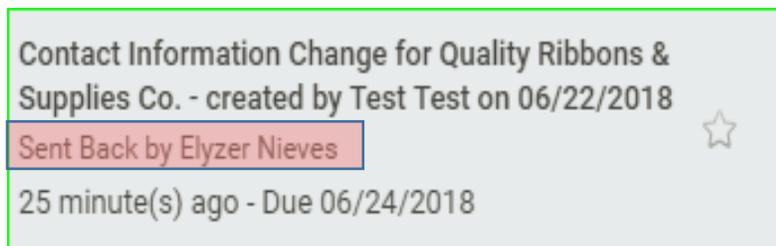
Once the Inbox page is open you will see 2 tabs:



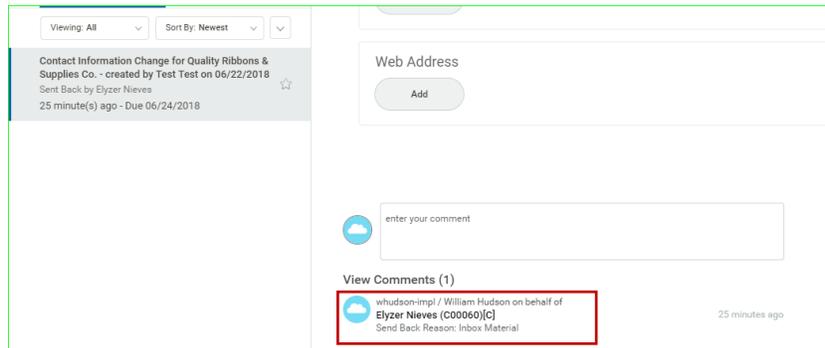
| Tab | Description |
|----------------|---|
| Actions | Displays incomplete business process tasks, approvals, and To Dos in chronological order. |
| Archive | Displays business process tasks and actions completed. The system default displays tasks and actions for the last 30 days. To see additional items, follow the steps listed under Archive Tab on page 13. |

Actions Tab

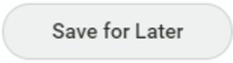
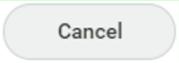
Once there is pending action you are now ready to review what action is required. In the next example we see that a previous change request has been sent back in the red box.



On the right side scroll down the page to review the comments from the Approver. These comments will identify actions you will need to take.



Task Actions

| Task Actions | Description |
|---|---|
|  | If the icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time. |
|  | If the icon Cancel is selected, you will go back to the menu screen without saving any data. |
|  | If the icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request. |
|  | Once a process has been submitted you can press Done to go back to the Inbox. |

Success! Event submitted

[Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018](#) Actions

25 minute(s) ago - Due 06/24/2018

Up Next
Supplier Administrator
Approval by Supplier Administrator
Due Date 06/24/2018

Do Another
[Change Supplier Contact Information](#)

Details and Process

For Quality Ribbons & Supplies Co.

Overall Process [Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018](#)

Overall Status In Progress

Due Date 06/24/2018

Details Process

Done

Click  to return to the inbox.

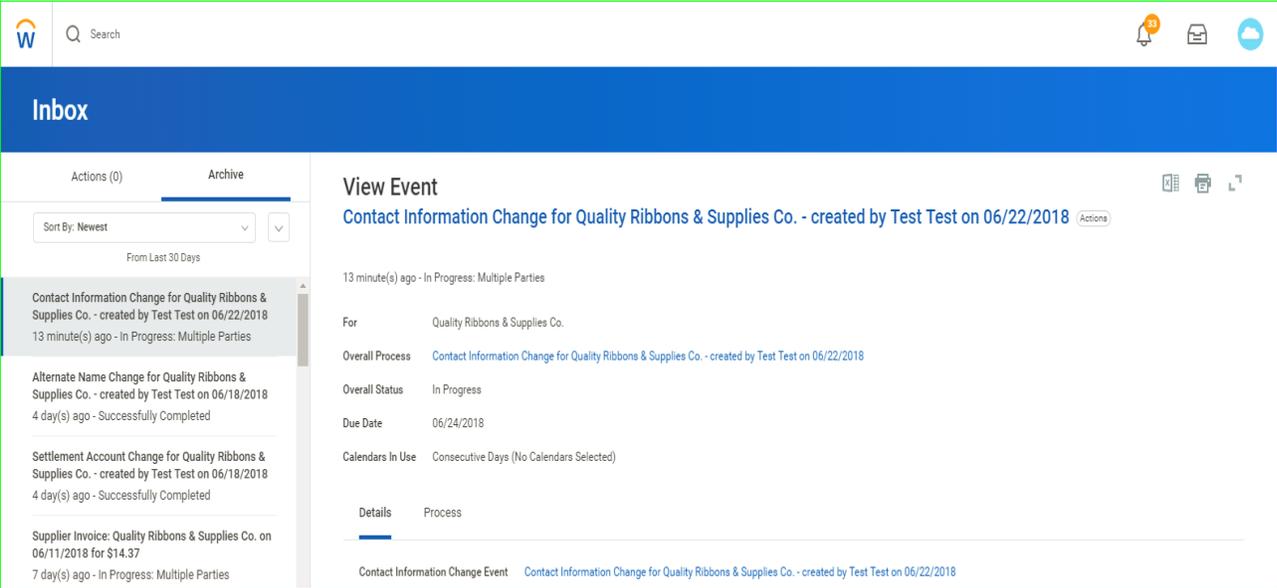
Once you have taken action on any messages, your Inbox Application will clear out showing that you don't have any pending actions. You have the option to see all transactions on the Archive Tab (details below).

Helpful Hint: Submitting a transaction will come back with the final status from the approver that could be: Denied, Sent Back for update or Approved.

Archive Tab

On the Archive Tab below you will see the review history of all the actions that have been taken within your Inbox.

The Archive tab displays completed action items for 30 days from the initiated request date. To view archived items older than 30 days, perform the following steps: Click the down arrow and select "View More Processes". When the "View More Processes" screen is displayed, enter the "Start Date" and "End Date", and then click OK.



Inbox

Actions (0) Archive

Sort By: Newest

From Last 30 Days

Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018
13 minute(s) ago - In Progress: Multiple Parties

Alternate Name Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018
4 day(s) ago - Successfully Completed

Settlement Account Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018
4 day(s) ago - Successfully Completed

Supplier Invoice: Quality Ribbons & Supplies Co. on 06/11/2018 for \$14.37
7 day(s) ago - In Progress: Multiple Parties

View Event

Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018

13 minute(s) ago - In Progress: Multiple Parties

For Quality Ribbons & Supplies Co.

Overall Process Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018

Overall Status In Progress

Due Date 06/24/2018

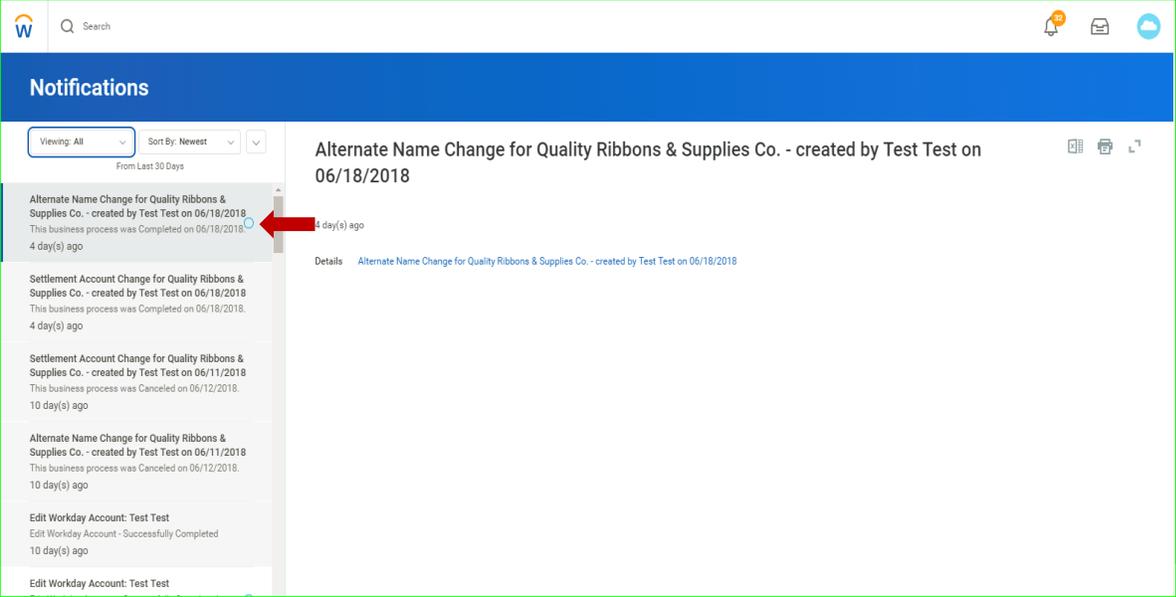
Calendars In Use Consecutive Days (No Calendars Selected)

Details Process

Contact Information Change Event Contact Information Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/22/2018

Notifications

Notifications are used to keep you informed of activity related to your account. These are typically items that you need to know about but don't require action. In the example below, the  was selected. Unread notifications will have a circle  next to them. The circle will disappear once the notification is selected.



Notifications

Viewing: All Sort By: Newest

From Last 30 Days

Alternate Name Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018
This business process was Completed on 06/18/2018.
4 day(s) ago

Settlement Account Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018
This business process was Completed on 06/18/2018.
4 day(s) ago

Settlement Account Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/12/2018
This business process was Canceled on 06/12/2018.
10 day(s) ago

Alternate Name Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/11/2018
This business process was Canceled on 06/12/2018.
10 day(s) ago

Edit Workday Account: Test Test
Edit Workday Account - Successfully Completed
10 day(s) ago

Edit Workday Account: Test Test

Alternate Name Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018

Details Alternate Name Change for Quality Ribbons & Supplies Co. - created by Test Test on 06/18/2018

Contact and Banking Application

Purpose: The purpose of this Application is to enable suppliers to maintain or view their supplier data, such as addresses and settlement banking information, and to submit their own updates.

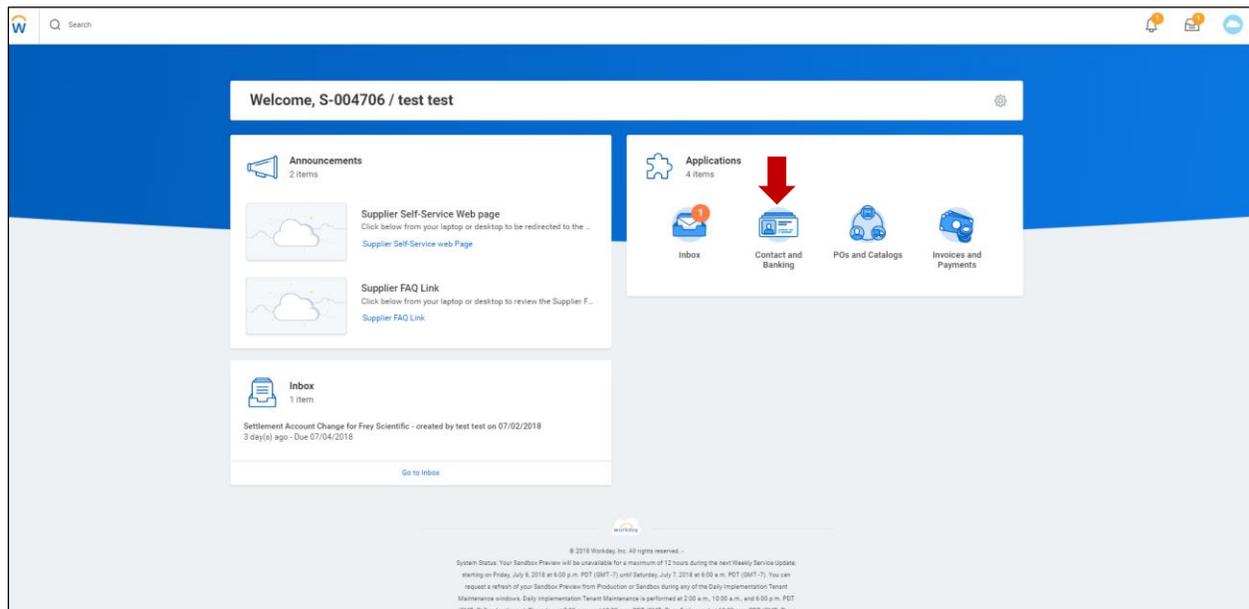
How to Access: Go to the CMSD supplier portal home page, select the **Contact and Banking** icon under the **Applications** section.

Audience: CMSD Approved Suppliers

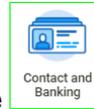
Helpful Hints: You will need to be registered as a supplier contact and need to have access credentials in order to log in to the Supplier Portal.

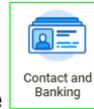
Procedure: Complete the following steps to understand the use of the Application and the different Dashboards.

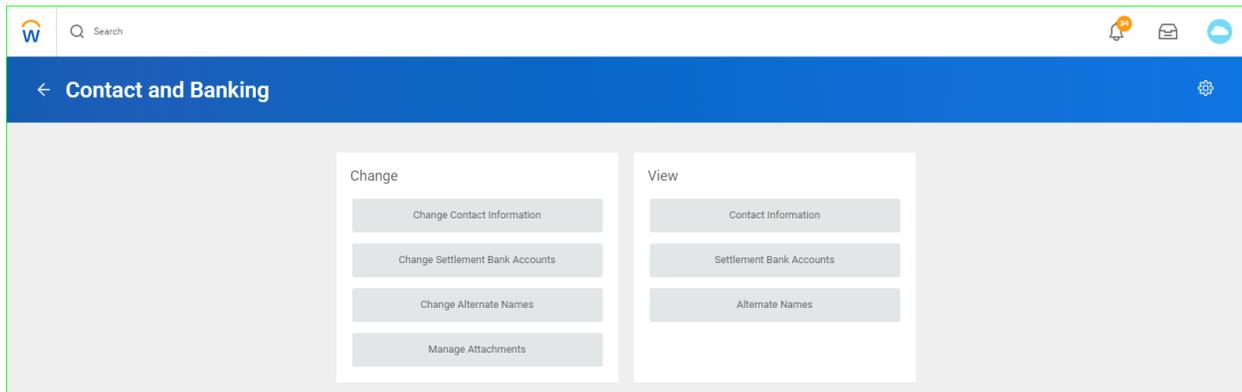
Once you log in to the supplier portal you will see the next home page where you will be able to apply different actions by selecting specific Applications like: Inbox, Contact and Banking, Invoices and Payments, and PO's and Catalogs.



Contact and Banking Application



To access the Contact and Banking application click the  icon. Once selected a new dashboard page will open.



The dashboard is divided into two sections:

Change will allow you to maintain and update your company information. An internal approval process will be triggered if you initiate and submit a change of information.

| Task | Description |
|---|--|
| Change Supplier Contact Information | Submit new and updated supplier contact information for review and approval. |
| Change Supplier Settlement Bank Account | Submit new, and updated supplier settlement bank accounts for review and approval. |
| Change Supplier Alternate Name | Submit new and updated supplier alternate names for review and approval. |

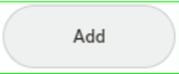
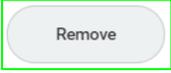
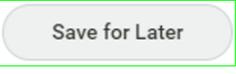
| | |
|--------------------|--|
| Manage Attachments | Upload multiple type of files related to the information provided. |
|--------------------|--|

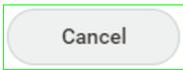
The second option **View** will just allow the supplier contact user to see the existing data on “view mode”.

Change

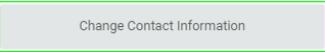
Task Actions for Change Request:

Below you will find the list of task actions possible and a brief description on what each action will trigger within a change request.

| Task Actions | Description |
|---|---|
|  | Before any change can be made a confirmation message will pop up and will need to be confirmed to start the draft Change by selecting the OK icon. |
| Delete <input type="checkbox"/> | If the Delete box is checked, the existing record type where selected will be deleted once the transaction is fully approved once submitted. |
|  | If the Icon Add is selected, it will open up a new section based on the selection type to include a new record to the supplier data. |
|  | If the Icon Remove is selected, it will remove the record you just inserted by selecting the Add action above. |
|  | If the Icon Save for Later is selected, it will save the changes and they can be picked up at a later time to complete all the pending edits and submit for approval at a later time. |

| | |
|---|---|
|  | <p>If the Icon Cancel is selected, it will just take you back to the menu screen without saving any data.</p> |
|  | <p>If the Icon Submit is selected, it will trigger the actual changes for the Supplier Administrator to review, update, approve or cancel the corresponding change request.</p> |

Change Contact Information

Select the icon  below you will find what information can be updated with this task.

1. Phone

Phone

Delete

Country Phone Code *

Phone Number *

Phone Extension

Phone Device *

Type *

Primary

Use For

Visibility Public

Comments

| Field | Required/Optional |
|--------------------|-------------------|
| Country Phone Code | Required |
| Phone Number | Required |
| Phone Extension | Optional |

| | |
|--------------|---|
| Phone Device | Required |
| Type | Business (Default) |
| Primary | At least one must be Primary |
| Use For | Billing Remit To (See helpful hint below) Shipping |
| Visibility | Required |
| Comments | Optional |

Helpful Hint: If the remit to address is to be used as the primary business/contact address, you only need to complete the remit-to address section it will serve as the address for all instances

Address

Address

Delete

Effective Date * 01 / 01 / 1980

Country * X United States of America

Address Line 1 * 2769 Commercial Rd

Address Line 2

City * Cleveland

State * X Ohio

Postal Code * 44113

County

Usage

Type * Business

Primary

Use For Mailing Remit To

Visibility Public

Comments

Helpful Hint: Please DO NOT remove old addresses. CMSD has opted to retain all account history. If your address has changed, please **Add** the new address with a new effective date.

| Field | Required/Optional |
|----------------|--|
| Effective Date | Required |
| Country | Required |
| Address Line 1 | Required |
| Address Line 2 | Optional |
| City | Required |
| State | Required |
| Postal Code | Required |
| County | Optional |
| Type | Business (Default) |
| Primary | At least one must be Primary we suggest selecting the most effective dated one. |
| Use For | Select one or all that apply |
| Visibility | Required |
| Comments | Optional |

Email

Email

Delete

Email Address * wd.testoms2@gmail.com

Type * Business

Primary

Use For Billing Remit To Shipping

Visibility Public

Comments

| Field | Required/Optional |
|---------------|------------------------------|
| Email Address | Required |
| Type | Business (Default) |
| Primary | At least one must be Primary |
| Use For | Select one or all that apply |
| Visibility | Required |
| Comments | Optional |

Instant Messenger

Instant Messenger

User Name *

Provider * select one

Type * Business

Primary

Use For (empty)

Visibility Public

Comments

| Field | Required/Optional |
|-----------|-------------------|
| User Name | Required |

| | |
|------------|------------------------------|
| Provider | Required |
| Type | Business (Default) |
| Primary | At least one must be Primary |
| Use For | (empty) |
| Visibility | Required |
| Comments | Optional |

Web Address

Web Address

URL Address *

Type Business

Primary

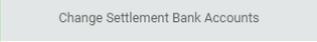
Use For Shipping

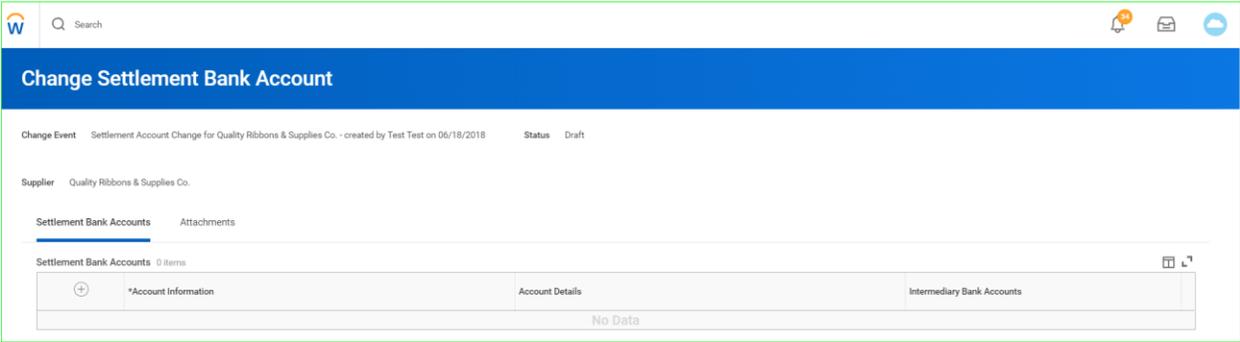
Visibility Public

Comments

| Field | Required/Optional |
|-------------|------------------------------|
| URL Address | Required |
| Type | Business (Default) |
| Primary | At least one must be Primary |
| Use For | Select one or all that apply |
| Visibility | Required |
| Comments | Optional |

Change Settlement Bank Accounts

Select the icon  below you will find what information can be added or updated with this task.



We are going to select the  icon in order to insert a Settlement Bank Account.

Settlement Account Information

+ *Account Information

-

Account Nickname

Account Type *

Checking

Savings

Supplier Connection Payment Types

Payment Types

For Supplier Connections Only

Inactive

| Field | Required/Optional |
|------------------|-------------------|
| Account Nickname | Required |

| | |
|-----------------------------------|------------------------------|
| Account Type | One required |
| Supplier Connection Payment Types | Do Not Use |
| Payment Types | Select one or all that apply |
| For Supplier Connections Only Box | Do Not Use |

Settlement Account Details

Account Details

Country *

Bank Name

Branch Code

Branch Name

Bank Code

Account Number

Check Digit

Name On Account

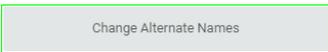
Roll Number

IBAN

| | |
|--------------------------|----------------------|
| Bank Identification Code | <input type="text"/> |
| Bank Instructions | <input type="text"/> |

| Field | Required/Optional |
|--------------------------|-------------------|
| Country | Required |
| Bank Name | Required |
| Branch Code | Optional |
| Branch Name | Optional |
| Bank Code | Required |
| Account Number | Required |
| Check Digit | Optional |
| Name on Account | Optional |
| Roll Number | Optional |
| IBAN | Optional |
| Bank Identification Code | Optional |
| Bank Instructions | Optional |

Change Alternate Names

Select the icon  below you will find what information can be updated with this task.

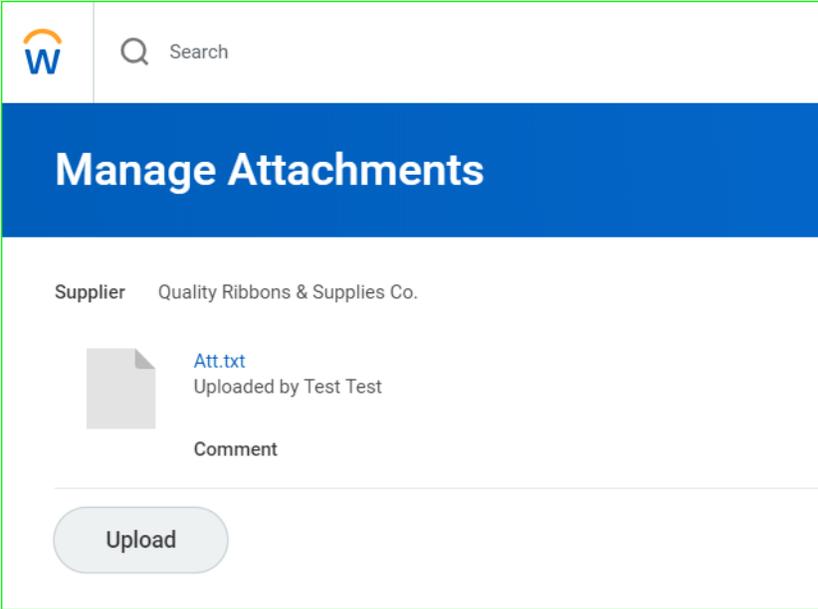
Select the  icon in order to insert a new Alternate Name.

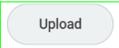


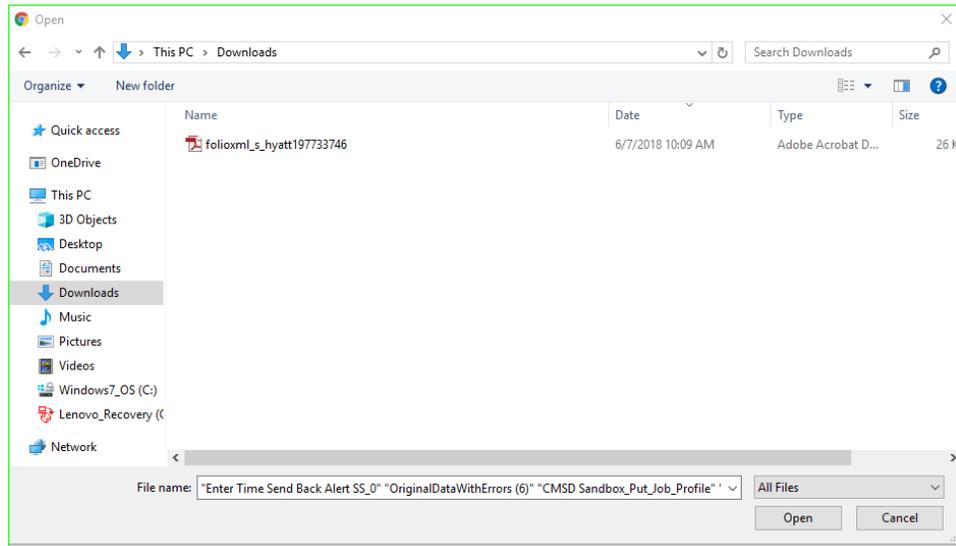
| Field | Required/Optional |
|-------|---|
| Name | Required |
| Usage | Select 1099 MISC Recipient and any other that may apply |

Manage Attachments

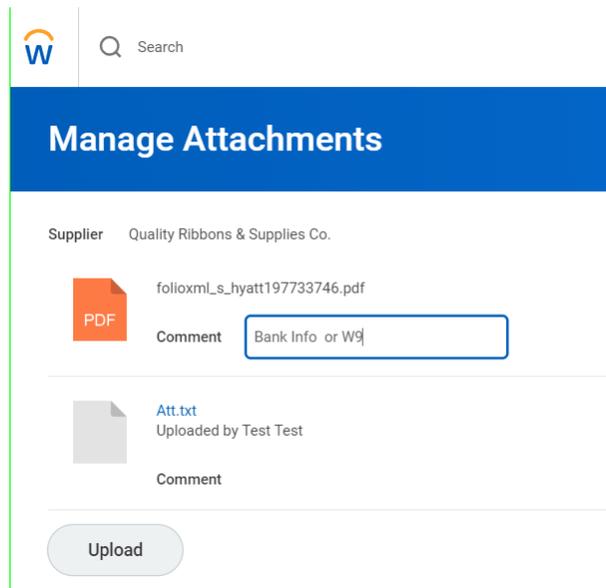
Select the icon  below you will find what information can be updated with this task.



You will only have the ability to use the upload task to include additional attachments by selecting the  icon which will open your local file location to allow you to select the files you want to upload.



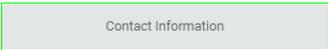
Once selected, click **Open** and the file will show on the Manage Attachments page along with a brief description of the file...

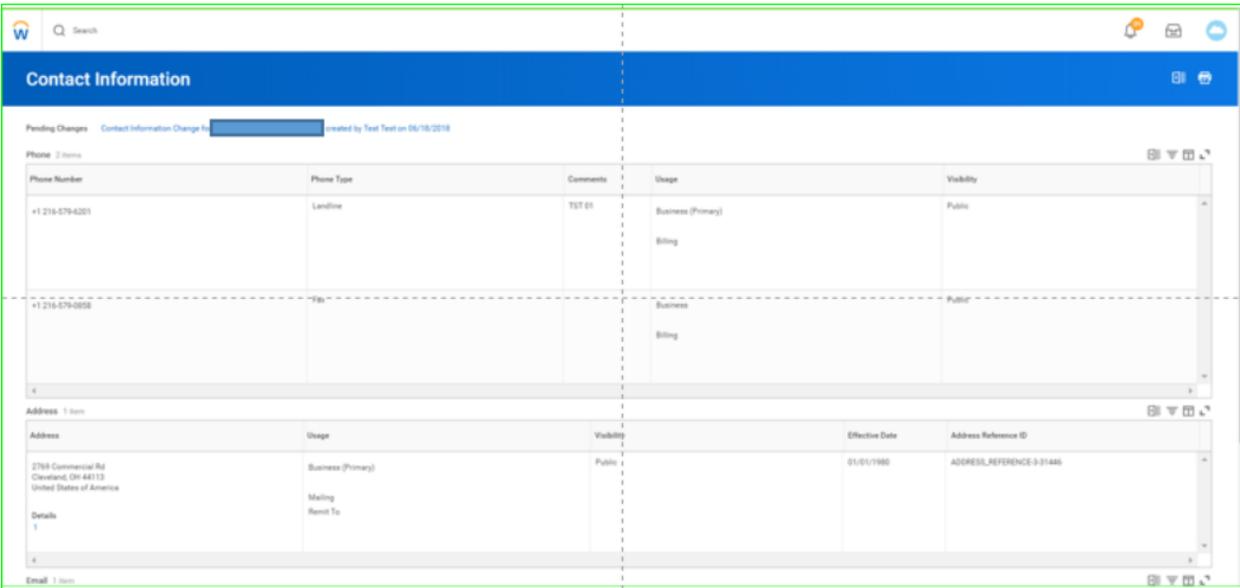


If necessary, you may add more files by repeating the Manage Attachment steps.

View

Contact Information

Select the icon  below you will find what information can be viewed with this task.



Contact Information

Pending Changes: Contact Information Change No. [redacted] created by Test Test on 06/16/2018

Phone 2 items

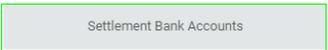
| Phone Number | Phone Type | Comments | Usage | Visibility |
|-----------------|------------|----------|-------------------------------|------------|
| +1 216-579-6201 | Landline | TST 01 | Business (Primary) Billing | Public |
| +1 216-579-0828 | Fig. | | Business Billing | Public |

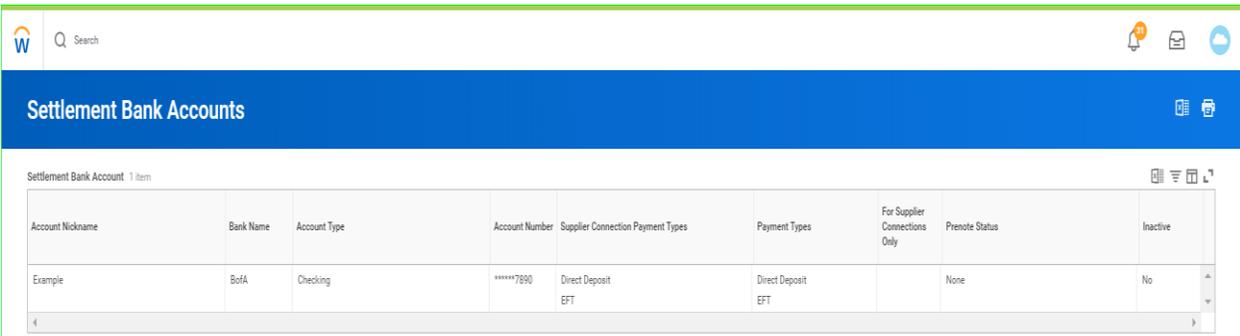
Address 1 item

| Address | Usage | Visibility | Effective Date | Address Reference ID |
|---|---|------------|----------------|---------------------------|
| 2768 Commercial Rd Cleveland, OH 44113 United States of America | Business (Primary) Mailing Recruit To | Public | 01/01/1980 | ADDRESS_REFERENCE-9-01446 |

Email 1 item

Settlement Bank Accounts

Select the icon  below you will find what information can be viewed with this task.



Settlement Bank Accounts

Settlement Bank Account 1 item

| Account Nickname | Bank Name | Account Type | Account Number | Supplier Connection Payment Types | Payment Types | For Supplier Connections Only | Prenote Status | Inactive |
|------------------|-----------|--------------|----------------|-----------------------------------|-----------------------|-------------------------------|----------------|----------|
| Example | BofA | Checking | *****7890 | Direct Deposit EFT | Direct Deposit EFT | | None | No |

Alternate Names

Select the icon Alternate Names below you will find what information can be viewed with this task.

 Search





Alternate Names
 

Primary Name

Primary Name Quality Ribbons & Supplies Co.

Usage

- Alternate Supplier Connection
- Doing Business As
- EDI Integration Name
- Integration Name Matching
- Purchase Order Name
-  More (4)

Alternate Names 1 item   

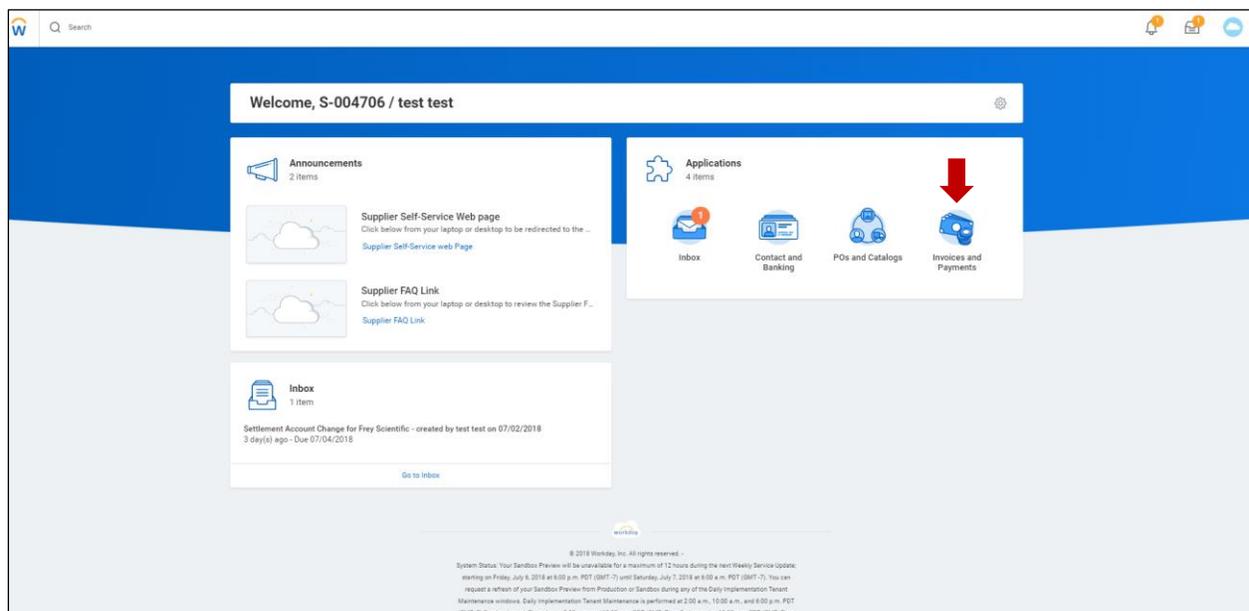
| Name | Usage |
|-------|---------------------|
| test1 | 1099 MISC Recipient |

Invoices and Payments Application

- Purpose:** To provide instructions for viewing and searching most recent invoices and payments.
- How to Access:** Log into the Supplier Self Service Portal and click **Invoices & Payments** on your under the Applications section of the home page.
- Audience:** CMSD Approved Suppliers
- Helpful Hints:** Clicking on the **blue** text on any screen will return additional information.
- Procedure:** Follow the steps below to view and search invoices and payments.

Invoices and Payments

Invoices and Payments can be accessed from your Supplier Self Service Portal home page. This application allows you to view the details for **most recent payments** and **most recent invoices**.



Most Recent Payments

Most Recent Payments details include payment amount, payment date, transaction reference, and the number of invoices included in the payment while

| Most Recent Payments  | | | | | | |
|--|--|----------------|----------|--------------|-----------------------|---|
| Payment | View | Payment Amount | Currency | Payment Date | Transaction Reference | Invoices |
| Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/23/2018 | View  | 17.82 | USD | 02/23/2018 | | 1 |
| Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/08/2018 | View | 356.76 | USD | 02/08/2018 | 1009967 (Check) | 5  |
| Supplier Payment Contract & Commercial Customer Id: 1065558DET: 02/01/2018 | View | 909.78 | USD | 02/01/2018 | 1009593 (Check) | 3 |
| Supplier Payment: Contract & Commercial Customer Id: 1065558DET: 01/25/2018 | View | 11.78 | USD | 01/25/2018 | 1009125 (Check) | 1 |

 [View More Details...](#)

Clicking **View More Details** (in blue above) in the bottom left corner of Most Recent Payments will allow you to perform detailed searches using the selection fields below. This option allows customized searches to fit your needs.

Find Payments for Supplier Contact

Payment Date On or After

Payment Date On or Before

Payment Types

Payment Status

Payment Currency

Payment Amount Equal To

Payment Amount Greater Than

Payment Amount Less Than

Supplier Reference Number

Transaction Reference

Indicates availability of a search menu.
See search options in the table below.



Search menu options:

| Selection Options | Options |
|-------------------------|--|
| Payment Types | Cash, Check, Credit Card, Debit Card, Direct Debit, Direct Deposit, EFT, Manual, Wire |
| Payment Status | Approved, Awaiting Payment Acknowledgement, Awaiting Settlement, Canceled, Complete, Draft, Escheated, In Progress, Payment Received, Rejected, Returned, Stopped, Unapplied |
| Payment Currency | Generally USD but other currency selections are available |

Clicking **View** in the second column of the Most Recent Payments table returns payment details for each invoice included in the payment. The example below is the results of clicking **View** for the payment in the amount of \$356.76 which includes five invoices.

W Search

View Payment for Supplier Contact

Supplier Payment: Supplier Payment: Staples Contract & Commercial Customer Id: 10655580ET: 02/08/2018 Status: Complete Reconciliation Status: Unreconciled

Payment Information

Company: Cleveland Metropolitan School District

Payee: Staples Contract & Commercial Customer Id: 10655580ET

Payment Date: 02/08/2018

Payment Amount: 356.76

Currency: USD

Memo: (empty)

Payment Detail

Bank Account: Key Bank - Accounts Payable Checking 3688

Payment Type: Check

Transaction Reference: 1009967

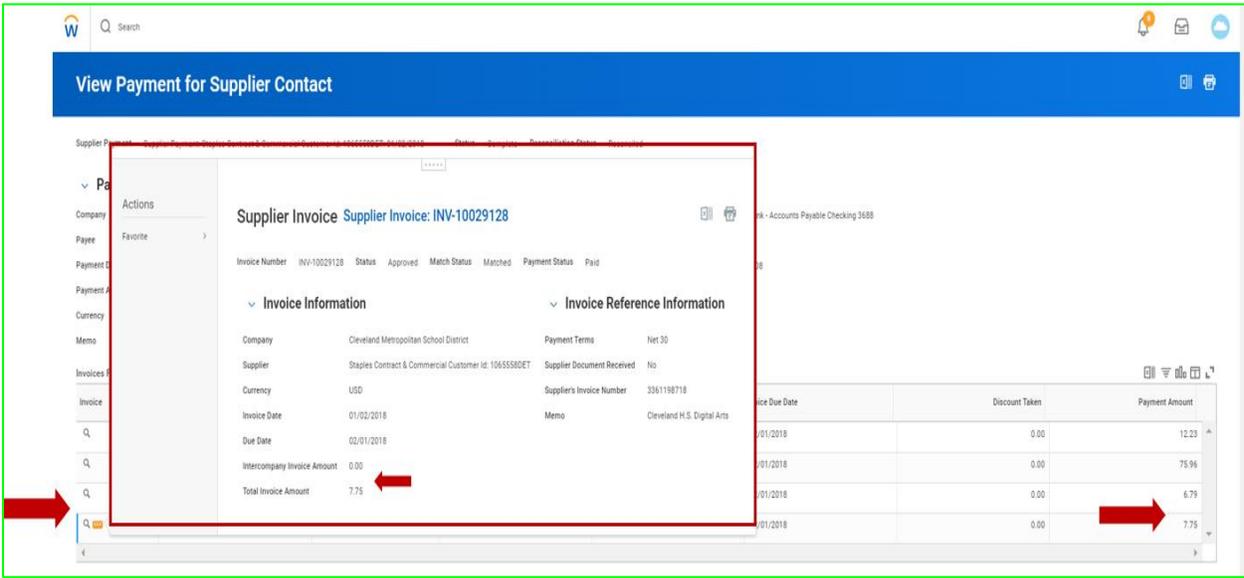
Invoices Paid: 5 items

| Invoice | Invoice Date | Supplier's Invoice Number | Invoice Amount | Discount Due Date | Invoice Due Date | Discount Taken | Payment Amount |
|---------|--------------|---------------------------|----------------|-------------------|------------------|----------------|----------------|
| Q | 02/08/2018 | 3368261428 | 19.19 | | 03/10/2018 | 0.00 | 19.19 |
| Q | 02/08/2018 | 3368261429 | 602.15 | | 03/10/2018 | 0.00 | 602.15 |
| ... | 02/08/2018 | 3367231078 | (319.00) | | 03/10/2018 | 0.00 | (319.00) |
| Q | 02/07/2018 | 3368197015 | 22.43 | | 03/09/2018 | 0.00 | 22.43 |
| Q | 02/07/2018 | 3368197014 | 31.99 | | 03/09/2018 | 0.00 | 31.99 |



Report features found in the top right of the report table allows you to export to Excel, filter data, create graphs, view/edit grid preferences, and toggle to full

As shown below, additional invoice details can be obtained by placing the cursor to the right of the magnifying glass and clicking on the yellow Twinkie (). A pop-up window will display additional details.



View Payment for Supplier Contact

Supplier Invoice: INV-10029128

Company: Cleveland Metropolitan School District

Supplier: Staples Contract & Commercial Customer id: 1065558DE7

Invoice Date: 01/02/2018

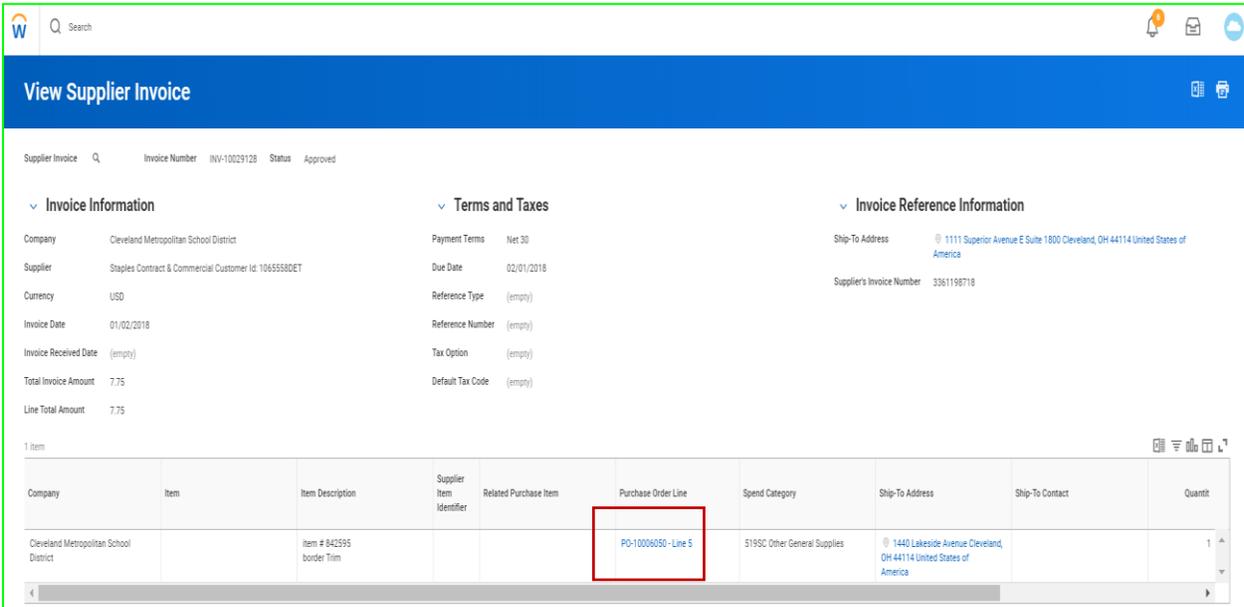
Due Date: 02/01/2018

Intercompany Invoice Amount: 0.00

Total Invoice Amount: 7.75

| Invoice Due Date | Discount Taken | Payment Amount |
|------------------|----------------|----------------|
| 01/01/2018 | 0.00 | 12.23 |
| 01/01/2018 | 0.00 | 75.96 |
| 01/01/2018 | 0.00 | 6.79 |
| 01/01/2018 | 0.00 | 7.75 |

Clicking directly on the magnifying glass will return the results shown below.



View Supplier Invoice

Supplier Invoice: INV-10029128 Status: Approved

Invoice Information

Company: Cleveland Metropolitan School District

Supplier: Staples Contract & Commercial Customer id: 1065558DE7

Currency: USD

Invoice Date: 01/02/2018

Invoice Received Date: (empty)

Total Invoice Amount: 7.75

Line Total Amount: 7.75

Terms and Taxes

Payment Terms: Net 30

Due Date: 02/01/2018

Reference Type: (empty)

Reference Number: (empty)

Tax Option: (empty)

Default Tax Code: (empty)

Invoice Reference Information

Ship-To Address: 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Supplier's Invoice Number: 3361198718

| Company | Item | Item Description | Supplier Item Identifier | Related Purchase Item | Purchase Order Line | Spend Category | Ship-To Address | Ship-To Contact | Quantity |
|--|------|---------------------------|--------------------------|-----------------------|-----------------------------|------------------------------|---|-----------------|----------|
| Cleveland Metropolitan School District | | Item # 842595 border Trim | | | <u>PO-10006050 - Line 5</u> | 5195C Other General Supplies | 1440 Lakeside Avenue Cleveland, OH 44114 United States of America | | 1 |

Line item detail can be displayed by clicking directly on the **blue text** under Purchase Order Line (see above). The results are shown below.

View Goods Order Line

Goods Order Line

Line 5

Purchase Order PO-10006050

Supplier Staples Contract & Commercial Customer Id: 1065558DET

Item (empty)

Spend Category \$195C Other General Supplies

Tax Applicability (empty)

Tax Code (empty)

Tax Recoverability

Quantity 1

Unit of Measure Bundle

Unit Cost 14.99

Extended Amount 14.99

Currency USD

Prepaid

Ship-To Address 1440 Lakeside Avenue Cleveland, OH 44114 United States of America

Ship-To Contact (empty)

Receipts 1 item

| Receipt | Quantity Received | Received UOM | Quantity Ordered UOM |
|-----------------------------|-------------------|--------------|----------------------|
| REC-0020296 for PO-10006050 | 1 | Bundle | 1 Bundle |
| | | | Total: 1 |

Most Recent Invoices

This report provides the list of your most recent invoices. Details for most recent invoices include invoice: number, amount, due date, status and payment status.

Most Recent Invoices

| Invoice | Supplier Reference Number | Total Invoice Amount | Currency | Due Date | Invoice Status | Payment Status |
|------------------------------|---------------------------|----------------------|----------|------------|----------------|----------------|
| INV-10035972 | TEST001 | 267.91 | USD | 07/11/2018 | In Progress | Unpaid |
| INV-10035977 | | 0.00 | USD | 02/11/2018 | Canceled | |
| INV-10035979 | 3368234959 | 17.82 | USD | 02/11/2018 | Approved | Paid |
| INV-10035596 | 3368261429 | 602.15 | USD | 02/10/2018 | Approved | Paid |
| INV-10035598 | 3368261428 | 19.19 | USD | 02/10/2018 | Approved | Paid |
| INV-10035611 | 3367231079 | (319.00) | USD | 02/10/2018 | Approved | Paid |
| INV-10035364 | 3368197014 | 31.99 | USD | 02/09/2018 | Approved | Paid |
| INV-10035365 | 3368197015 | 22.43 | USD | 02/09/2018 | Approved | Paid |
| INV-10035366 | 3368197016 | 72.98 | USD | 02/09/2018 | Approved | Unpaid |
| INV-10034226 | 3366276847 | 110.79 | USD | 02/02/2018 | Approved | Paid |

[View More Details](#)

To see the details related to a given invoice, click on the invoice number (in blue text) in the column titled Invoice. A sample of the results is shown below.

View Supplier Invoice

Supplier Invoice Invoice Number INV-10035970 Status Draft

Invoice Information

Company Cleveland Metropolitan School District

Supplier Office Depot - Acct. 10798088

Currency USD

Invoice Date 06/11/2018

Invoice Received Date (empty)

Total Invoice Amount 30.00

Line Total Amount 30.00

Terms and Taxes

Payment Terms Net 30

Due Date 07/11/2018

Reference Type (empty)

Reference Number (empty)

Tax Option (empty)

Default Tax Code (empty)

Invoice Reference Information

Ship-To Address 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Supplier's Invoice Number 6878886

1 item

| Company | Item | Item Description | Supplier Item Identifier | Related Purchase Item | Purchase Order Line | Spend Category | Ship-To Address | Ship-To Contact | Quantity | Unit of Measure |
|--|------|------------------|--------------------------|-----------------------|-------------------------------------|-----------------------|--|-----------------|----------|-----------------|
| Cleveland Metropolitan School District | | Delivery Charge | | | PO-0503821 - Line 1 | 5123C Office Supplies | 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America | | 1 | Each |

To review the line item details, click the blue text under Purchase Order Line. See example below.

View Goods Order Line

Goods Order Line

Line 1

Purchase Order PO-0503821

Supplier Office Depot - Acct. 10798088

Item (empty)

Spend Category 5123C Office Supplies

Tax Applicability (empty)

Tax Code (empty)

Tax Recoverability

Quantity 1

Unit of Measure Each

Unit Cost 30.00

Extended Amount 30.00

Currency USD

Prepaid

Ship-To Address 1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Ship-To Contact (empty)

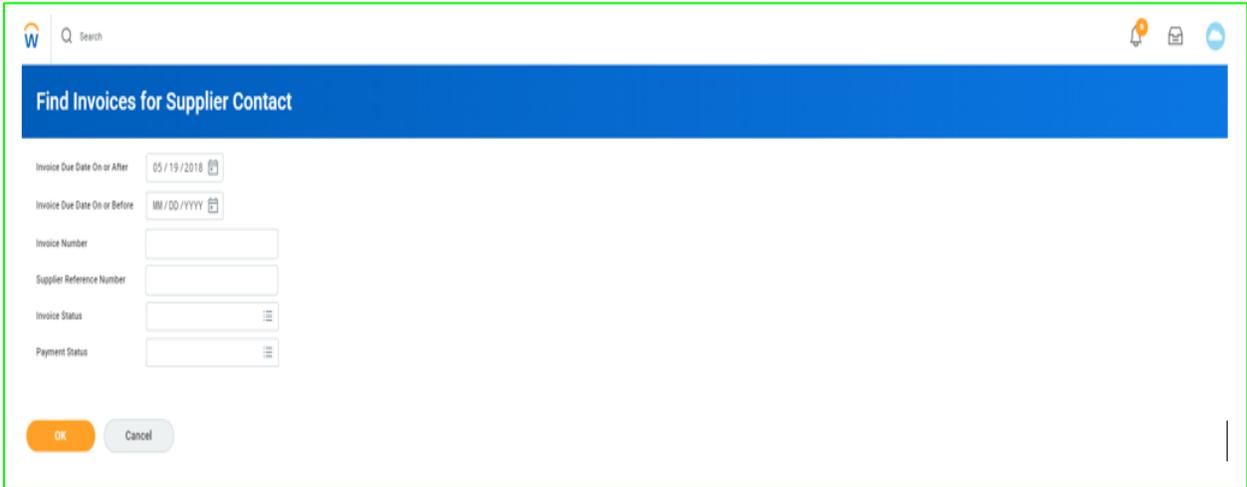
Receipts Invoices

Receipts 1 item

| Receipt | Quantity Received | Received UOM | Quantity Ordered | Ordered UOM |
|--------------------------------|-------------------|--------------|------------------|-------------|
| LEGACY-903821-1 for PO-0503821 | 1 | Each | 1 | Each |
| Total: | | | 1 | Each |

If you don't see the invoice you want, click **View More Details** on the bottom left of the report to open the **Find Invoices for Supplier Contract** box. This feature allows you to search for

invoices based on due dates, invoice number, supplier reference number, and invoice or payment status.



Enter your search criteria and click  to continue the search or  to discontinue the search. Not all fields are required to complete a search. You can customize the search based on your needs.



Search menu options:

| Selection Criteria | Options |
|-----------------------|--|
| Invoice Status | Approved, Canceled, Denied, Draft, Incomplete, In Progress |
| Payment Status | Paid, Partially Paid, Unpaid |

Find Purchase Orders

This feature allows you to search for a purchase order based on date or purchase order number. To perform a search enter the date range or purchase order number and click  to continue or  to stop the search.



W Search

Find Purchase Orders for Supplier Contact

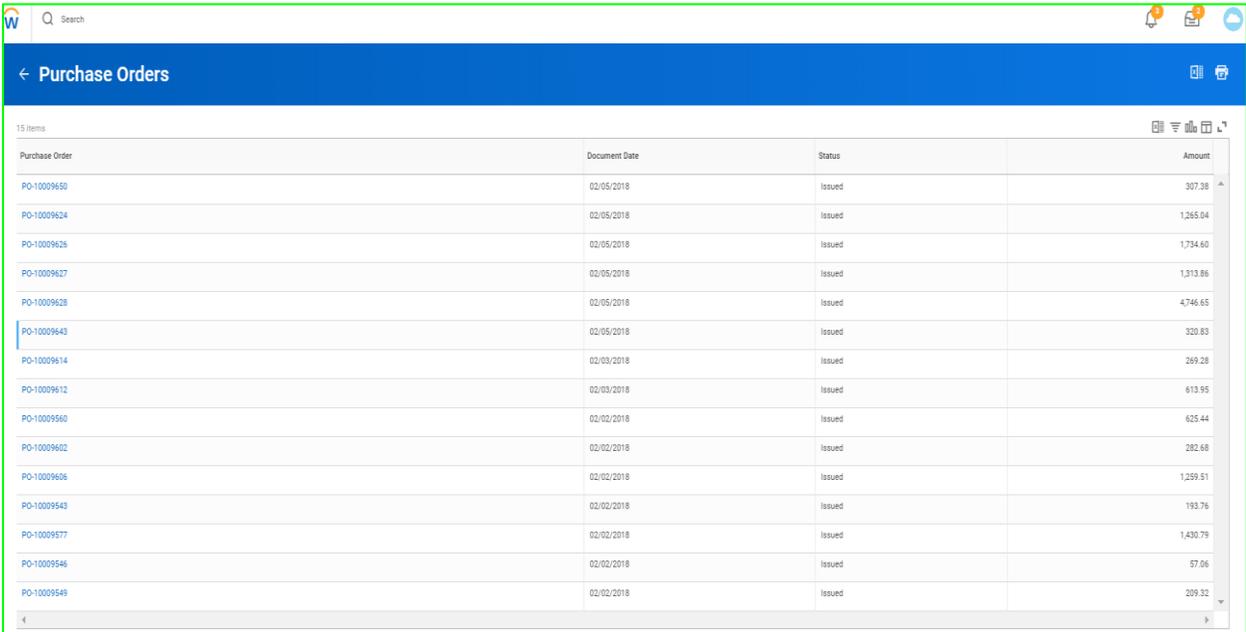
Document Date On or After: 05 / 19 / 2018

Document Date On or Before: MM / DD / YYYY

Purchase Order:

OK Cancel

Below is an example of the results for a search based on date.



W Search

← Purchase Orders

15 Items

| Purchase Order | Document Date | Status | Amount |
|----------------|---------------|--------|----------|
| PO-10009650 | 02/05/2018 | Issued | 307.38 |
| PO-10009624 | 02/05/2018 | Issued | 1,265.04 |
| PO-10009626 | 02/05/2018 | Issued | 1,734.60 |
| PO-10009627 | 02/05/2018 | Issued | 1,313.86 |
| PO-10009628 | 02/05/2018 | Issued | 4,746.65 |
| PO-10009643 | 02/05/2018 | Issued | 320.83 |
| PO-10009614 | 02/03/2018 | Issued | 269.28 |
| PO-10009612 | 02/03/2018 | Issued | 613.95 |
| PO-10009560 | 02/02/2018 | Issued | 625.44 |
| PO-10009602 | 02/02/2018 | Issued | 282.68 |
| PO-10009606 | 02/02/2018 | Issued | 1,259.51 |
| PO-10009543 | 02/02/2018 | Issued | 193.76 |
| PO-10009577 | 02/02/2018 | Issued | 1,430.79 |
| PO-10009546 | 02/02/2018 | Issued | 57.06 |
| PO-10009549 | 02/02/2018 | Issued | 209.32 |

To view the purchase order details, click the purchase order number (in blue text). Below is an example of the results.

View Purchase Order
📄 🖨️

Purchase Order **PO-10009650** PO Number **PO-10009650**

Summary

Company: Cleveland Metropolitan School District

Document Date: 02/05/2018

Supplier: Office Depot - Acct. 10798088

Payment Terms: Net 30

Due Date: (empty)

Currency: USD

Total Amount: 307.38

Requisition Type: Regular

Contact Information

Issue Option: XML Auto

Buyer: Lyncolija Parks (501389)

Buyer Email: Lyncolija.Parks@clevelandmetroschools.org

Bill-To Contact: Lyncolija Parks (501389)

Bill-To Contact Detail: Lyncolija Parks (501389)

Bill-To Contact Email: Lyncolija.Parks@clevelandmetroschools.org

Billing Address: 1111 Superior Avenue E

Ship-To Contact: Nilda L. Mendoza (499384)

Ship-To Contact Detail: Nilda L. Mendoza (499384)

Ship-To Contact Email: Nilda.mendoza@clevelandmetroschools.org

Shipping Address: 1701 Castle Avenue Cleveland, OH 44113 United States of America

Items: 1 item

| Goods Order Line | Line | Item and Category | Supplier Item Identifier | Tax | Tax Recoverability | Quantity | Cost | Delivery | Retention | Prepaid | Ship-To Address |
|------------------|------|--|--------------------------|-------------------|--------------------|---------------|---------------------------|-----------|-----------|---------|---|
| 1 | 1 | Item | 500609 | Tax Applicability | | Ordered 2 | Unit of Measure Each | Due Date | | | 1701 Castle Avenue OH 44113 United States of America |
| | | Item Description Dell(TM) M111XH Return Program Black Toner Cartridge | | Tax Code | | Received 2 | Unit Cost 153.69 | Lead Time | | | |
| | | Spend Category 51290 Office Supplies | | | | Invoiced 0 | Extended Amount 307.38 | | | | |

POs and Catalogs Application

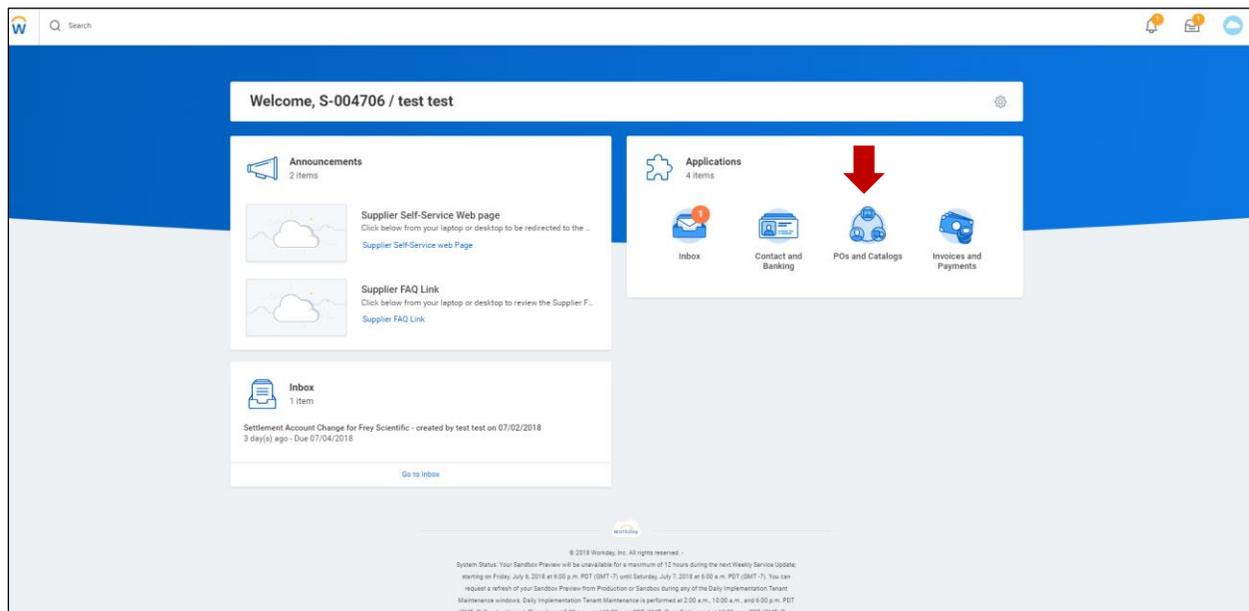
Purpose: To provide instructions for viewing and searching most recent invoices and payments.

How to Access: Log into the Supplier Self Service Portal and click **POs and Catalogs** under the Applications section of the home page.

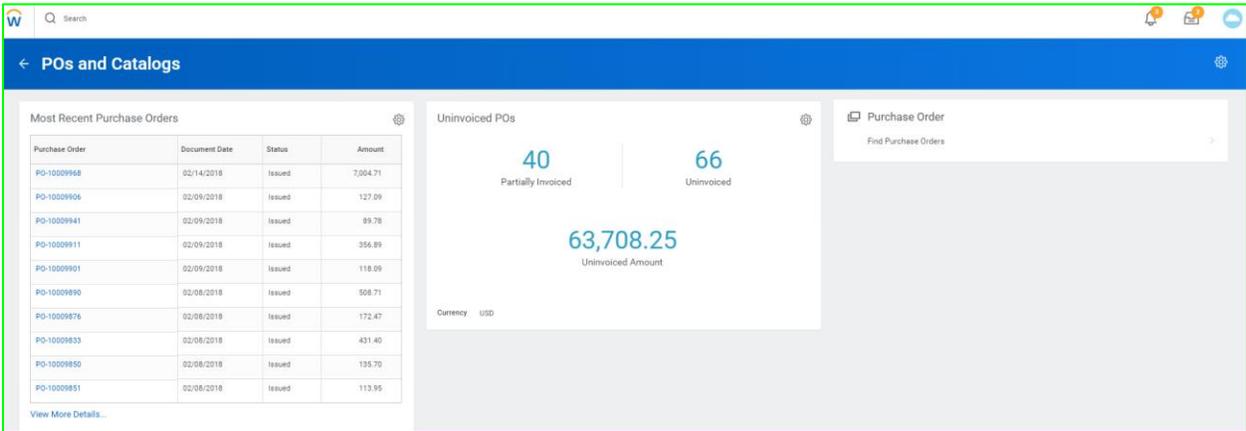
Audience: CMSD Approved Suppliers

Helpful Hints: Clicking on the [blue](#) text on any screen will return additional information.

Procedure: Follow the steps below to view and search PO and catalog items.



The **POs and Catalogs** application allows you to view your most recent purchase orders, view uninvoiced POs, and find purchase orders. Details include purchase order status, date, and amount, number of invoiced and partially invoiced POs, and amount of uninvoiced POs.



POs and Catalogs

Most Recent Purchase Orders

| Purchase Order | Document Date | Status | Amount |
|----------------|---------------|--------|----------|
| PO-10009968 | 02/14/2018 | Issued | 7,004.71 |
| PO-10009906 | 02/09/2018 | Issued | 127.09 |
| PO-10009941 | 02/09/2018 | Issued | 89.78 |
| PO-10009911 | 02/09/2018 | Issued | 356.89 |
| PO-10009901 | 02/09/2018 | Issued | 118.09 |
| PO-10009890 | 02/08/2018 | Issued | 508.71 |
| PO-10009876 | 02/08/2018 | Issued | 172.47 |
| PO-10009833 | 02/08/2018 | Issued | 431.40 |
| PO-10009850 | 02/08/2018 | Issued | 135.70 |
| PO-10009851 | 02/08/2018 | Issued | 113.95 |

View More Details...

Uninvoiced POs

40 Partially Invoiced | 66 Uninvoiced

63,708.25 Uninvoiced Amount

Currency: USD

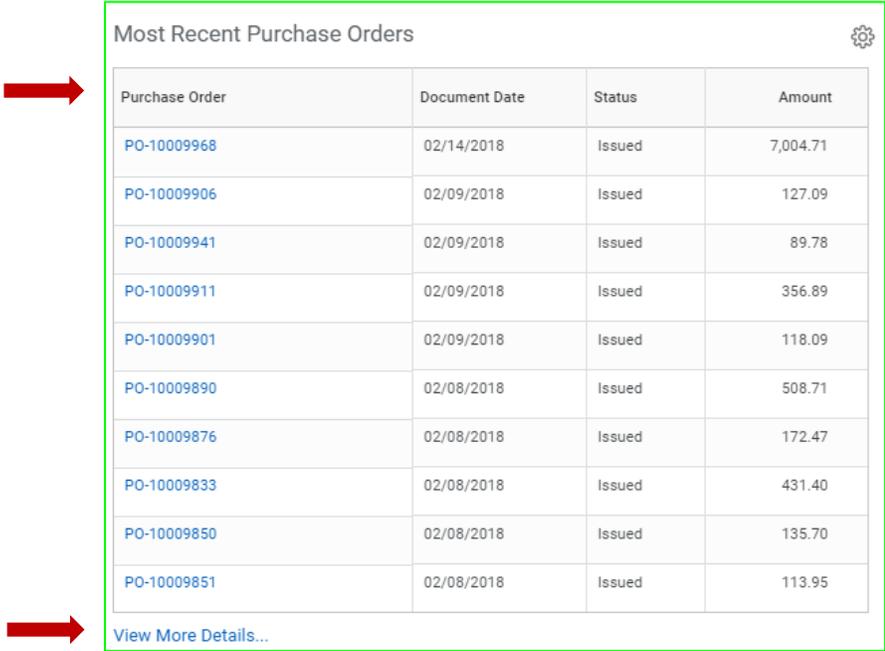
Purchase Order

Find Purchase Orders

Viewing information for POs and Catalogs is very similar to viewing information for Invoices and Payments.

Most Recent Purchase Orders

To view a purchase order, click the PO number in the first column.

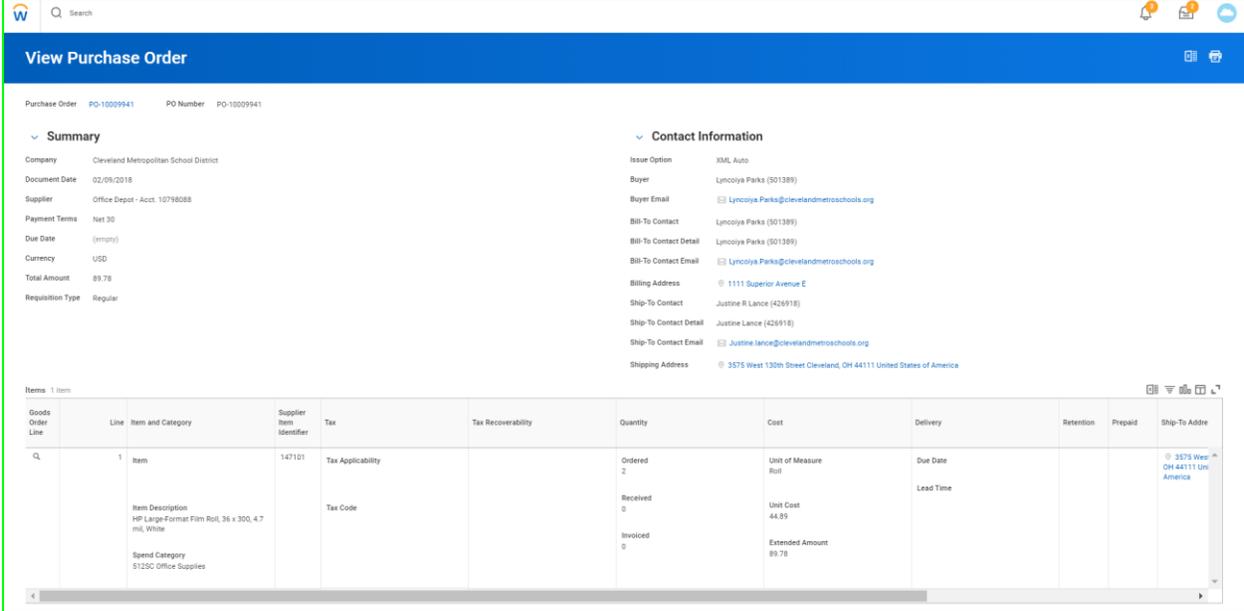


Most Recent Purchase Orders

| Purchase Order | Document Date | Status | Amount |
|-----------------------------|---------------|--------|----------|
| PO-10009968 | 02/14/2018 | Issued | 7,004.71 |
| PO-10009906 | 02/09/2018 | Issued | 127.09 |
| PO-10009941 | 02/09/2018 | Issued | 89.78 |
| PO-10009911 | 02/09/2018 | Issued | 356.89 |
| PO-10009901 | 02/09/2018 | Issued | 118.09 |
| PO-10009890 | 02/08/2018 | Issued | 508.71 |
| PO-10009876 | 02/08/2018 | Issued | 172.47 |
| PO-10009833 | 02/08/2018 | Issued | 431.40 |
| PO-10009850 | 02/08/2018 | Issued | 135.70 |
| PO-10009851 | 02/08/2018 | Issued | 113.95 |

[View More Details...](#)

A sample report is shown below.



View Purchase Order

Purchase Order: PO-1000941 PO Number: PO-1000941

Summary

Company: Cleveland Metropolitan School District
 Document Date: 02/09/2018
 Supplier: Office Depot - Acct. 10798088
 Payment Terms: Net 30
 Due Date: (empty)
 Currency: USD
 Total Amount: 89.78
 Requisition Type: Regular

Contact Information

Issue Option: XML, Auto
 Buyer: Lyncolva Parks (501389)
 Buyer Email: Lyncolva.Parks@clevelandmetroschools.org
 Bill-To Contact: Lyncolva Parks (501389)
 Bill-To Contact Detail: Lyncolva Parks (501389)
 Bill-To Contact Email: Lyncolva.Parks@clevelandmetroschools.org
 Billing Address: 1111 Superior Avenue E
 Ship-To Contact: Justine R Lance (426918)
 Ship-To Contact Detail: Justine Lance (426918)
 Ship-To Contact Email: Justine.lance@clevelandmetroschools.org
 Shipping Address: 3575 West 130th Street Cleveland, OH 44111 United States of America

Items: 1 item

| Goods Order Line | Line | Item and Category | Supplier Item Identifier | Tax | Tax Recoverability | Quantity | Cost | Delivery | Retention | Prepaid | Ship-To Address |
|------------------|------|---|--------------------------|-------------------|--------------------|--|---|-----------------------|-----------|---------|---|
| 1 | 1 | Item | 147101 | Tax Applicability | | Ordered: 2 Received: 0 Invoiced: 0 | Unit of Measure: Roll Unit Cost: 44.85 Extended Amount: 89.78 | Due Date Lead Time | | | 3575 West 130th Street Cleveland, OH 44111 United States of America |
| | | Item Description: HP Large-Format Film Roll, 36 x 300, 4.7 mil, White | | Tax Code | | | | | | | |
| | | Spend Category: 5125C Office Supplies | | | | | | | | | |

If the purchase order you seek is not listed, click **View More Details** to launch the search box. To search box below should appear. You may search by date or by PO number.



Find Purchase Orders for Supplier Contact

Document Date On or After: 05/19/2018

Document Date On or Before: MM/DD/YYYY

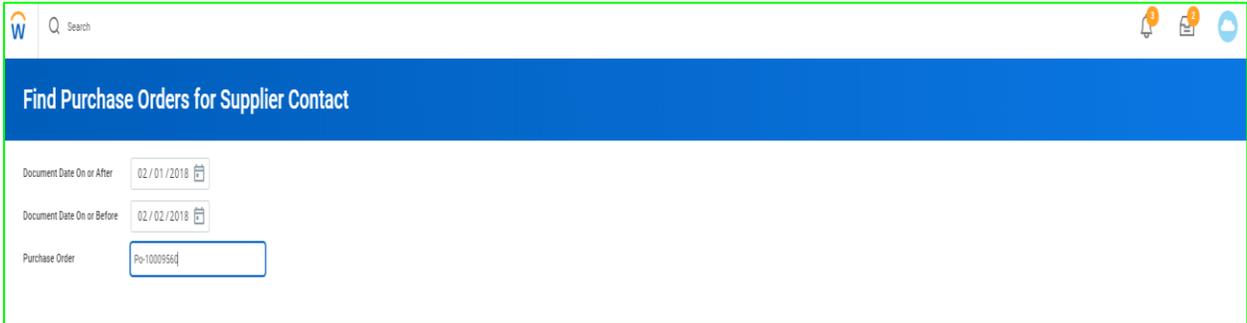
Purchase Order:

OK Cancel

To perform a search, enter your search criteria and click **OK** to continue or **Cancel** to stop the search.

Helpful Hint: You must make sure to enter the correct date range when searching for a specific purchase order, otherwise you will not get results.

Below is an example of the search criteria for PO 10009560. Please note the date fields have been populated with a date range that coincides with the purchase order date.



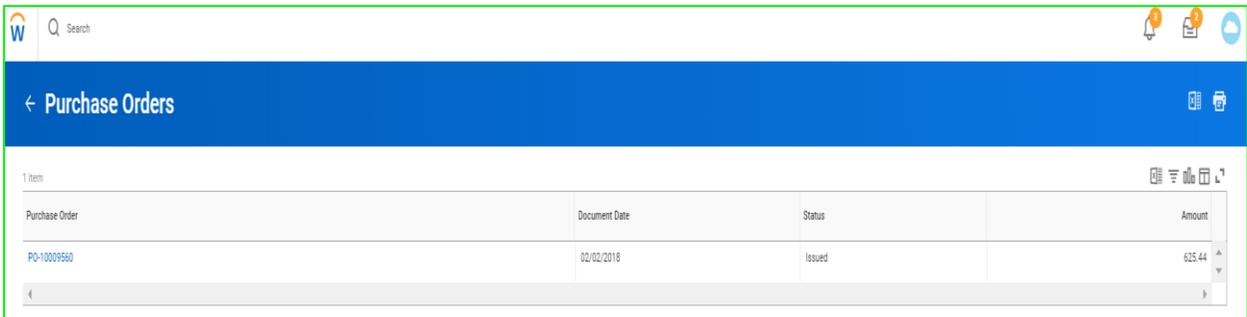
Find Purchase Orders for Supplier Contact

Document Date On or After: 02/01/2018

Document Date On or Before: 02/02/2018

Purchase Order: PO-10009560

Following is the result. Click the PO number (in blue) to see the details.



← Purchase Orders

1 Item

| Purchase Order | Document Date | Status | Amount |
|-----------------------------|---------------|--------|--------|
| PO-10009560 | 02/02/2018 | Issued | 625.44 |

Following is a sample of the report you will see. You can scroll up and down (right side of the report) or left and right (bottom of the report) to view the full report. You can also export to Excel.

View Purchase Order

Purchase Order: PO-10009560 PO Number: PO-10009560

Summary

Company: Cleveland Metropolitan School District

Document Date: 02/02/2018

Supplier: Office Depot - Acct. 10798088

Payment Terms: Net 30

Due Date: (empty)

Currency: USD

Total Amount: 625.44

Requisition Type: Regular

Contact Information

Issue Option: XML Auto

Buyer: Lyncoiya Parks (501389)

Buyer Email: Lyncoiya.Parks@clevelandmetroschools.org

Bill-To Contact: Lyncoiya Parks (501389)

Bill-To Contact Detail: Lyncoiya Parks (501389)

Bill-To Contact Email: Lyncoiya.Parks@clevelandmetroschools.org

Billing Address: 1111 Superior Avenue E

Ship-To Contact: Elizabeth Williamson (422881)

Ship-To Contact Detail: Elizabeth Williamson (422881)

Ship-To Contact Email: Elizabeth.williamson@clevelandmetroschools.org

Shipping Address: 9300 Quincy Avenue Cleveland, OH 44106 United States of America

Items: 11 items

| Goods Order Line | Line | Item and Category | Supplier Item Identifier | Tax | Tax Recoverability | Quantity | Cost | Delivery | Retention | Prepaid | Ship-To Address |
|------------------|------|--|--------------------------|-----------------------------------|--------------------|--|---|---------------------------|-----------|---------|--------------------------------------|
| Q | 1 | Item Item Description Cuisinart PrecisionChef Bowl Digital Kitchen Scale Spend Category 5115C Classroom Supplies | 416161 | Tax Applicability Tax Code | | Ordered 1 Received 0 Invoiced 0 | Unit of Measure Each Unit Cost 36.39 Extended Amount 36.39 | Due Date Lead Time | | | 9300 Quin OH 44106 Uni America |
| Q | 2 | Item | 853197 | Tax Applicability | | Ordered 2 Received | Unit of Measure Each | Due Date Lead Time | | | 9300 Quin OH 44106 Uni America |

Uninvoiced POs

This feature allows you to view partially invoiced POs and uninvoiced POs while providing the uninvoiced amount. Clicking on any of the blue text allows you to: view details, export to Excel, or export to a PDF.

Uninvoiced POs ⚙️

14

Partially Invoiced

7

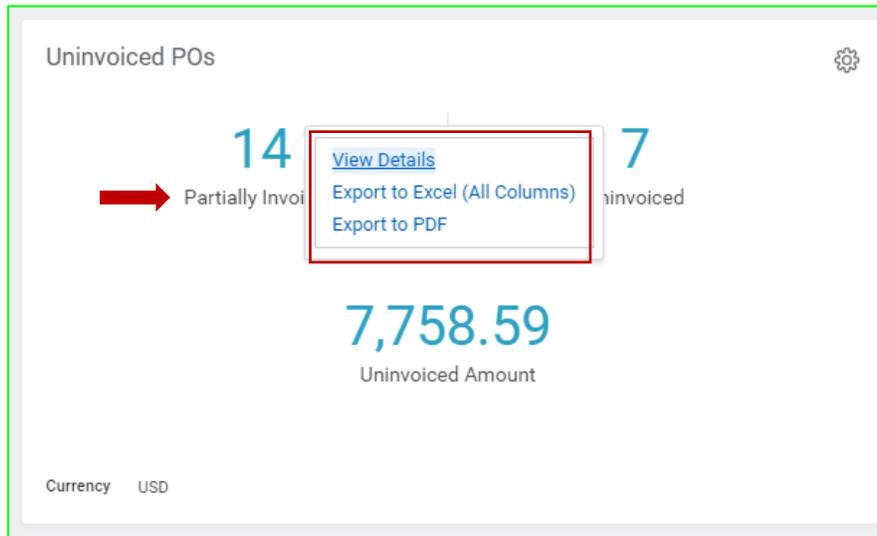
Uninvoiced

7,758.59

Uninvoiced Amount

Currency USD

To illustrate this functionality, we will use the **Partially Invoiced** field. The example below shows the menu options for Uninvoiced Amount and the resulting reports that are generated.



Helpful Hint: While the menu options are different (View Details, Export to Excel, Export to a PDF) for Partially Invoiced, the resulting reports will return the same information (PO#, document date, status, uninvoiced amount, and currency).

Sample Results: View Details

As shown in the upper right corner of the following report, tools are available to allow you to customize the report to fit your needs. Options include print, export to excel, filter, and create graphs.

[View Details](#)

To view the details, click any of the [blue fields](#) as shown above to pull up the menu. Click [View Details](#) on the menu to display the detailed report (see example on the next page).

14 items



| Purchase Order | Document Date | Status | Uninvoiced Amount | Currency |
|-----------------------------|---------------|--------|-------------------|----------|
| PO-0524094 | 05/10/2017 | Issued | 36.99 | USD |
| PO-0524759 | 05/16/2017 | Issued | 29.98 | USD |
| PO-0525142 | 05/18/2017 | Issued | 559.94 | USD |
| PO-0525153 | 05/18/2017 | Issued | 72.15 | USD |
| PO-0526126 | 05/25/2017 | Issued | 2,212.19 | USD |
| PO-0526342 | 05/26/2017 | Issued | 614.70 | USD |
| PO-0527988 | 05/31/2017 | Issued | 1,799.90 | USD |
| PO-10001647 | 08/16/2017 | Issued | 20.99 | USD |
| PO-10002020 | 08/24/2017 | Issued | 35.96 | USD |
| PO-10005646 | 11/02/2017 | Issued | 13.74 | USD |
| PO-10006050 | 11/13/2017 | Issued | 126.30 | USD |
| PO-10007939 | 12/21/2017 | Issued | 271.00 | USD |
| PO-10009064 | 01/25/2018 | Issued | 23.29 | USD |
| PO-10009393 | 01/31/2018 | Issued | 396.61 | USD |

Export to Excel



To export a file to Excel, click the  icon in the upper right corner of the data table (see above) or click [Export to Excel \(All Columns\)](#) as shown on the previous page. The Excel file will appear in the bottom left corner of the screen. Double click the file to open it.

Sample Results: Export to Excel

If you want to edit the Excel file, click  once the file has downloaded. See example on the next page.

Details_View (1) [Protected View] - Excel

File Home Insert Page Layout Formulas Data Review View Templates Tell me what you want to do...

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

B32

| | A | B | C | D | E |
|----|-----------------------|----------------------|---------------|--------------------------|-----------------|
| 1 | Purchase Order | Document Date | Status | Uninvoiced Amount | Currency |
| 2 | PO-0524094 | 5/10/2017 | Issued | 36.99 | USD |
| 3 | PO-0524759 | 5/16/2017 | Issued | 29.98 | USD |
| 4 | PO-0525142 | 5/18/2017 | Issued | 559.94 | USD |
| 5 | PO-0525153 | 5/18/2017 | Issued | 72.15 | USD |
| 6 | PO-0526126 | 5/25/2017 | Issued | 2,212.19 | USD |
| 7 | PO-0526342 | 5/26/2017 | Issued | 614.70 | USD |
| 8 | PO-0527988 | 5/31/2017 | Issued | 1,799.90 | USD |
| 9 | PO-10001647 | 8/16/2017 | Issued | 20.99 | USD |
| 10 | PO-10002020 | 8/24/2017 | Issued | 35.96 | USD |
| 11 | PO-10005646 | 11/2/2017 | Issued | 13.74 | USD |
| 12 | PO-10006050 | 11/13/2017 | Issued | 126.30 | USD |
| 13 | PO-10007939 | 12/21/2017 | Issued | 271.00 | USD |
| 14 | PO-10009064 | 1/25/2018 | Issued | 23.29 | USD |
| 15 | PO-10009393 | 1/31/2018 | Issued | 396.61 | USD |

Export to PDF

If you prefer to export the Partially Invoiced POs to a PDF file, choose the [Export to PDF](#) option.

Uninvoiced POs

14 Partially Invoiced 7 Invoiced

7,758.59 Uninvoiced Amount

Currency USD

[View Details](#)
[Export to Excel \(All Columns\)](#)
[Export to PDF](#)

The resulting PDF report is shown on the next page.

Sample Results: Export to PDF

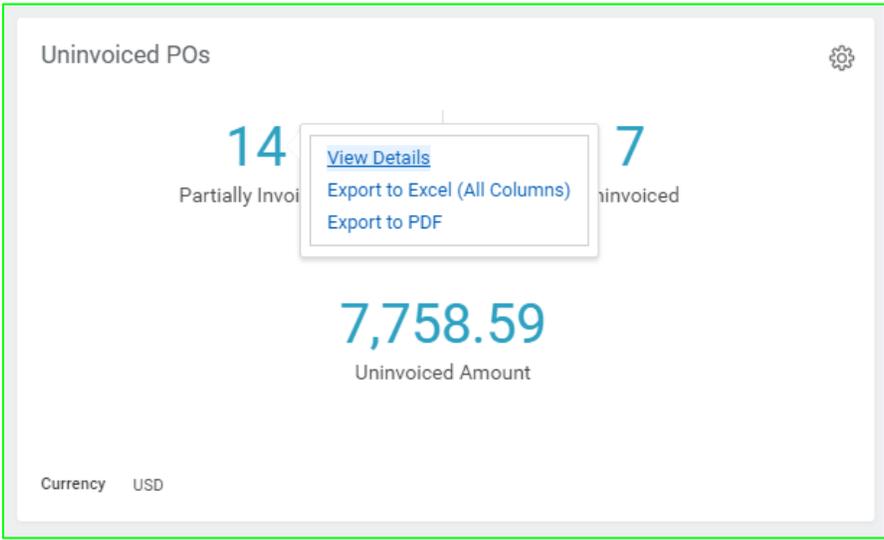


Details View

10:48 AM
06/20/2018
Page 1 of 1

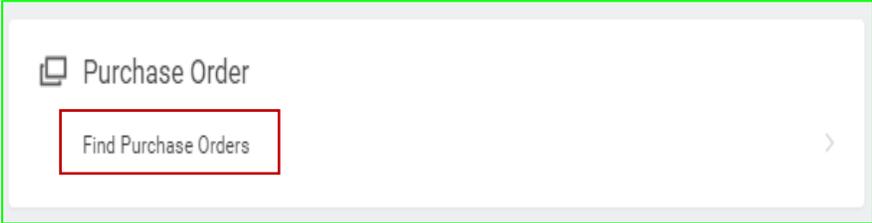
| Purchase Order | Document Date | Status | Uninvoiced Amount | Currency |
|----------------|---------------|--------|-------------------|----------|
| PO-0524094 | 05/10/2017 | Issued | 36.99 | USD |
| PO-0524759 | 05/16/2017 | Issued | 29.98 | USD |
| PO-0525142 | 05/18/2017 | Issued | 559.94 | USD |
| PO-0525153 | 05/18/2017 | Issued | 72.15 | USD |
| PO-0526126 | 05/25/2017 | Issued | 2,212.19 | USD |
| PO-0526342 | 05/26/2017 | Issued | 614.70 | USD |
| PO-0527988 | 05/31/2017 | Issued | 1,799.90 | USD |
| PO-10001647 | 08/16/2017 | Issued | 20.99 | USD |
| PO-10002020 | 08/24/2017 | Issued | 35.96 | USD |
| PO-10005646 | 11/02/2017 | Issued | 13.74 | USD |
| PO-10006050 | 11/13/2017 | Issued | 126.30 | USD |
| PO-10007939 | 12/21/2017 | Issued | 271.00 | USD |
| PO-10009064 | 01/25/2018 | Issued | 23.29 | USD |
| PO-10009393 | 01/31/2018 | Issued | 396.61 | USD |

Helpful Hint: The [View Details](#), [Export to Excel](#) and [Export to PDF](#) menu options shown below for Partially Invoiced, can also be used to display additional information for Uninvoiced and Uninvoiced Amount.

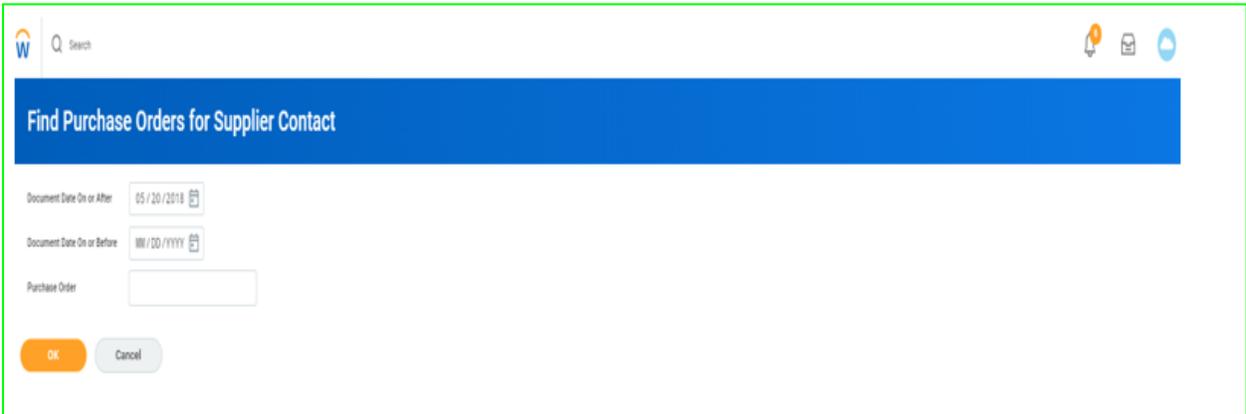


Purchase Orders

The Purchase Order option allows you to search for purchase orders by PO number and date. To activate the search, click **Find Purchase Orders**.



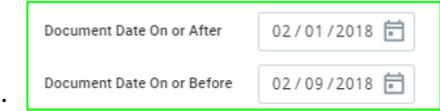
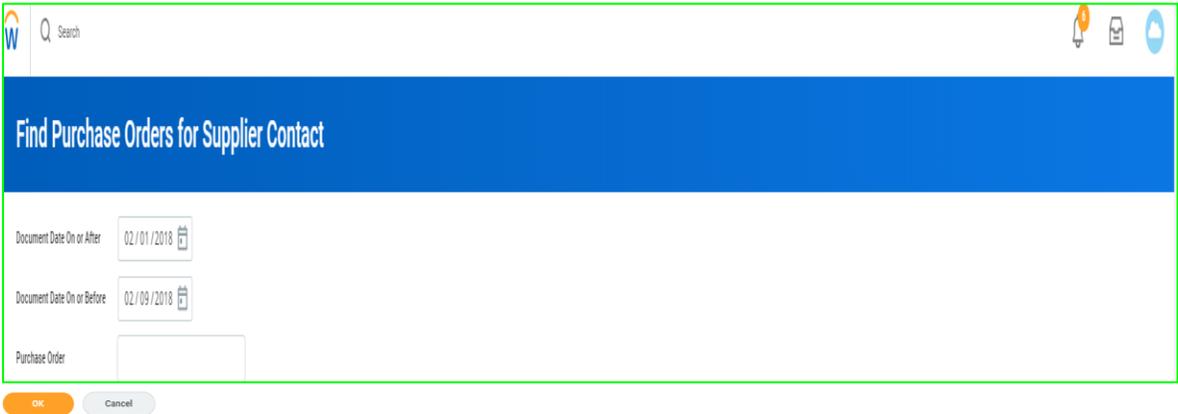
You will see the search criteria screen below. You can search by date range or by PO number.



Helpful Hint: If you search by PO number, be sure to enter a valid date range. If the date range does not coincide with the date of the PO, your search by PO will fail.

Search by Date Range

To search by date, enter the dates for purchase orders you'd like to see. In the example below we used the following dates.

Click to continue or to stop the search. Clicking returned the results below. We see two POs that were issued within the specified period.



| Purchase Order | Document Date | Status | Amount |
|----------------|---------------|--------|--------|
| PO-10009657 | 02/06/2018 | Issued | 160.43 |
| PO-10009651 | 02/05/2018 | Issued | 602.15 |

To view the purchase order details, click the Po number. We clicked the first PO on the list to generate the report below.

View Purchase Order

Purchase Order: PO-1000997 PO Number: PO-1000997

Summary

Company: Cleveland Metropolitan School District

Document Date: 02/04/2018

Supplier: Staples Contract & Commercial Customer Id: 10655580ET

Payment Terms: Net 30

Due Date: (empty)

Currency: USD

Total Amount: 150.43

Requisition Type: Regular

Contact Information

Issue Option: Print

Buyer: Ronisha Tremble (499259)

Buyer Email: Ronisha.tremble@clevelandmetroschools.org

Bill-To Contact: Ronisha Tremble (499259)

Bill-To Contact Detail: Ronisha Tremble (499259)

Bill-To Contact Email: Ronisha.tremble@clevelandmetroschools.org

Billing Address: 1111 Superior Avenue E

Ship-To Contact: Ronisha Tremble (499259)

Ship-To Contact Detail: Ronisha Tremble (499259)

Ship-To Contact Email: Ronisha.tremble@clevelandmetroschools.org

Shipping Address: 5100 Biddulph Avenue Cleveland, OH 44144 United States of America

Items: 2 items

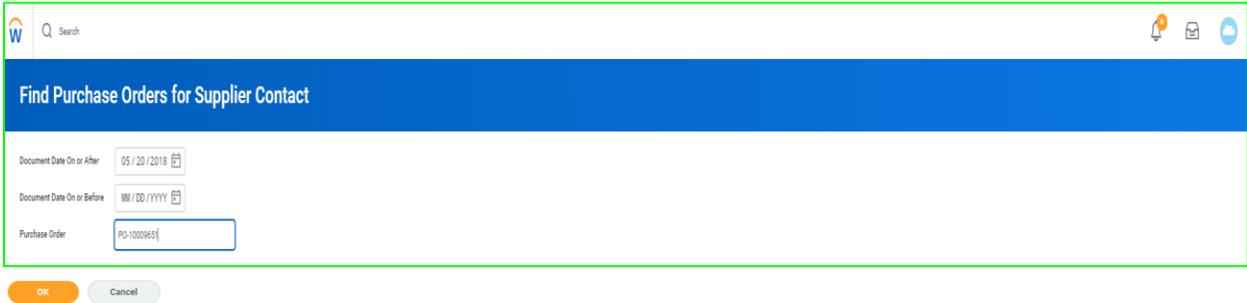
| Goods Order Line | Line | Item and Category | Tax | Tax Recoverability | Quantity | Cost | Delivery | Retention | Prepaid | Ship-To Address | Ship-To Contact |
|------------------|------|---|-----------------------------------|--------------------|---|---|---------------------------|-----------|---------|---|--------------------------|
| Q | 1 | Item Item Description Koss CS100 USB Communication Headset Staples Item # IM1RC2893 MPN Item #CS100 USB Spend Category 5123C Office Supplies | Tax Applicability Tax Code | | Ordered: 2 Received: 0 Invoiced: 0 | Unit of Measure: Each Unit Cost: 29.29 Extended Amount: 58.58 | Due Date Lead Time | | | 5100 Biddulph Avenue Cleveland, OH 44144 United States of America | Ronisha Tremble (499259) |
| Q | 2 | Item Item Description Maxell HP-100 Stereo Dynamic Open Air On-Ear Headphone, Black (190319) Staples Item # 213171 MPN Item #JAL_190319 Customer Item #213171 Spend Category 5123C Office Supplies | Tax Applicability Tax Code | | Ordered: 15 Received: 0 Invoiced: 0 | Unit of Measure: Each Unit Cost: 6.79 Extended Amount: 101.85 | Due Date Lead Time | | | 5100 Biddulph Avenue Cleveland, OH 44144 United States of America | Ronisha Tremble (499259) |

Search by Purchase Order

To reiterate, a search by purchase order requires both the purchase order number **and** a valid date range. If you choose a purchase order that was issued before or after the date range you enter, the search will not return valid results. Following are three search examples and the results.

Search by Purchase Order Number Only

In this example we use a valid PO number but did not change the default date range.



W Search

Find Purchase Orders for Supplier Contact

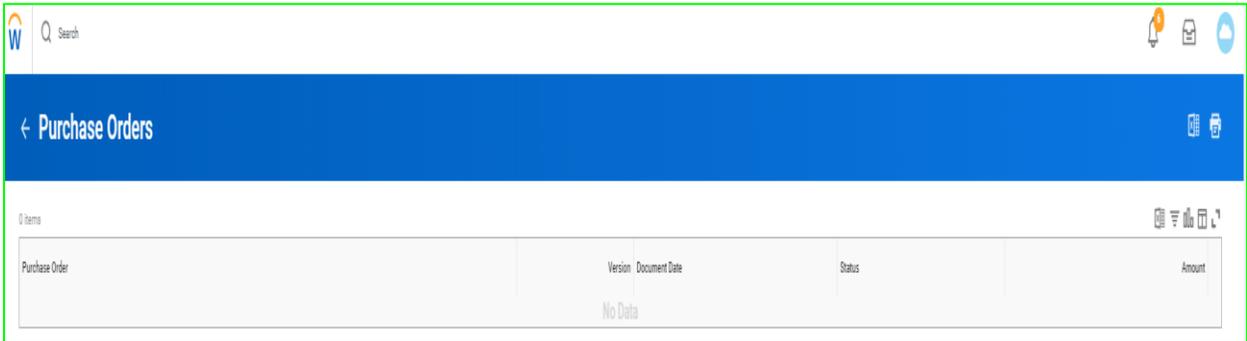
Document Date On or After: 05/20/2018

Document Date On or Before: MM/DD/YYYY

Purchase Order: PO-1000965

OK Cancel

While the PO number was valid, the date range was not (05/20/2018-MM/DD/YYYY). As a result, the purchase order search failed (see below).



W Search

Purchase Orders

0 Items

| Purchase Order | Version | Document Date | Status | Amount |
|----------------|---------|---------------|--------|--------|
| No Data | | | | |

Search for a Specific PO within a Specific Date Range

In this example we will perform a search using a valid PO number (PO-10009651) and a valid date range (02/01/2018 – 02/10/2018).



Find Purchase Orders for Supplier Contact

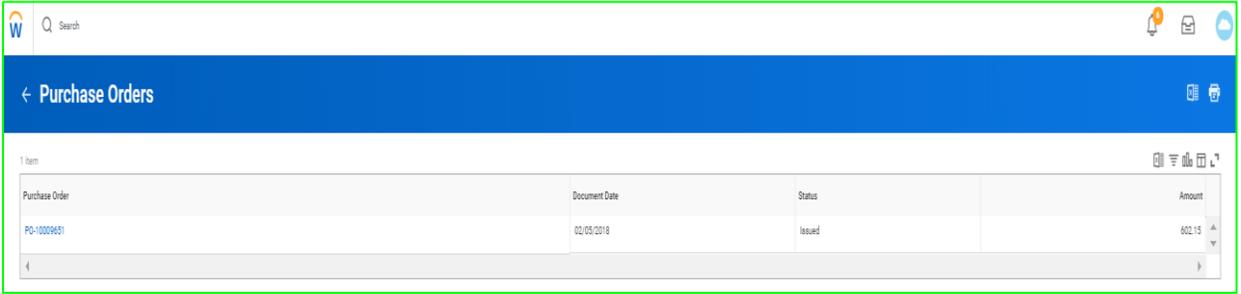
Document Date On or After: 02/01/2018

Document Date On or Before: 02/10/2018

Purchase Order: PO-10009651

OK Cancel

Because we used a valid search criteria, the purchase order search returned the PO we were looking for (see below).



← Purchase Orders

1 item

| Purchase Order | Document Date | Status | Amount |
|-----------------------------|---------------|--------|--------|
| PO-10009651 | 02/05/2018 | Issued | 602.15 |

Clicking the PO number (in blue) allows us to view the PO details (see below).

View Purchase Order

Purchase Order: PG-1000951 PO Number: PG-1000951

Summary

Company: Cleveland Metropolitan School District
 Document Date: 02/05/2018
 Supplier: Staples Contract & Commercial Customer Id: 1065558DET
 Payment Terms: Net 30
 Due Date: (empty)
 Currency: USD
 Total Amount: 602.15

Contact Information

Issue Option: Print
 Buyer: Pauline Reid (4982244)
 Buyer Email: Pauline.reid@clevelandmetroschools.org
 Bill-To Contact Detail: Pauline Reid
 Billing Address: 1111 Superior Avenue E
 Ship-To Contact Detail: Pauline Reid
 Shipping Address: 1440 Lakeside Avenue Cleveland, OH 44114 United States of America

Items: 5 items

| Goods Order Line | Line | Item and Category | Tax | Tax Recoverability | Quantity | Cost | Delivery | Retention | Prepaid | Ship-To Address | Ship-To Contact | |
|------------------|------|---|-----------------------------------|--------------------|----------|-----------------|-----------|-----------|---------|-----------------|---|--|
| Q | 1 | Item Item Description Item# 2072177 Dry erase markers fine black 12 pk Spend Category 5115C Classroom Supplies | Tax Applicability Tax Code | | Ordered | Unit of Measure | Due Date | | | | 1440 Lakeside Avenue Cleveland, OH 44114 United States of America | |
| | | | | | 8 | Dozen | Lead Time | | | | | |
| | | | | | Received | Unit Cost | | | | | | |
| | | | | | 8 | 6.99 | | | | | | |
| | | Invociced | Extended Amount | | | | | | | | | |
| | | | | | 8 | 55.92 | | | | | | |
| Q | 2 | Item Item Description Item# 131283 Paper Mate Liquid paper 12 pk Spend Category 5115C Classroom Supplies | Tax Applicability Tax Code | | Ordered | Unit of Measure | Due Date | | | | 1440 Lakeside Avenue Cleveland, OH 44114 United States of America | |
| | | | | | 2 | Dozen | Lead Time | | | | | |
| | | | | | Received | Unit Cost | | | | | | |
| | | | | | 2 | 26.96 | | | | | | |
| | | Invociced | Extended Amount | | | | | | | | | |
| | | | | | 2 | 53.92 | | | | | | |

Search by Date Range Only

In most cases, date range searches are used for “open” searches. Open searches are used to identify all open purchase orders for a specific period of time. In this case, the date range used for the search will be: 02/01/2018-02/15/2018.

Find Purchase Orders for Supplier Contact

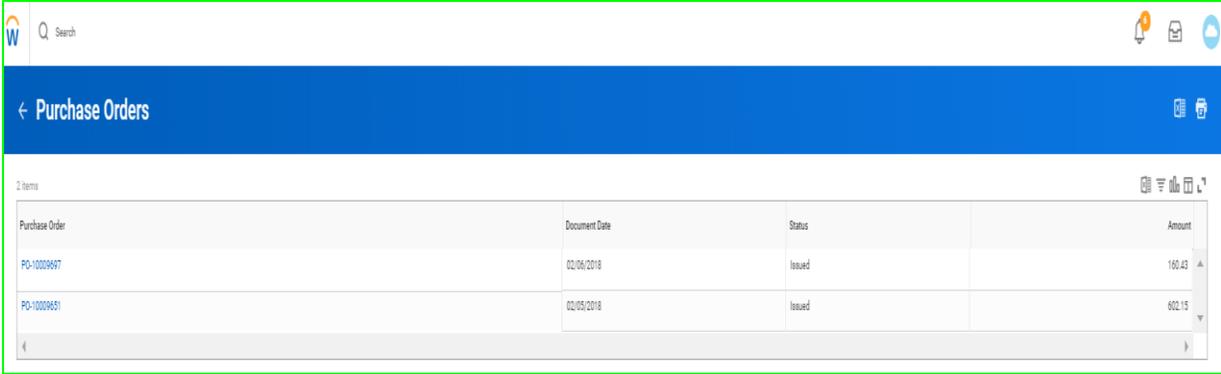
Document Date On or After: 02/01/2018

Document Date On or Before: 02/15/2018

Purchase Order:

OK Cancel

The search by date range (02/01/2018-02/15/2018) returned the results below.



| Purchase Order | Document Date | Status | Amount |
|----------------|---------------|--------|--------|
| PD-10009697 | 02/06/2018 | Issued | 160.43 |
| PD-10009651 | 02/05/2018 | Issued | 602.15 |

Training Notes

