Managing Purchase Orders

IRON MOUNTAIN CONNECT™

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Purchase Orders Overview

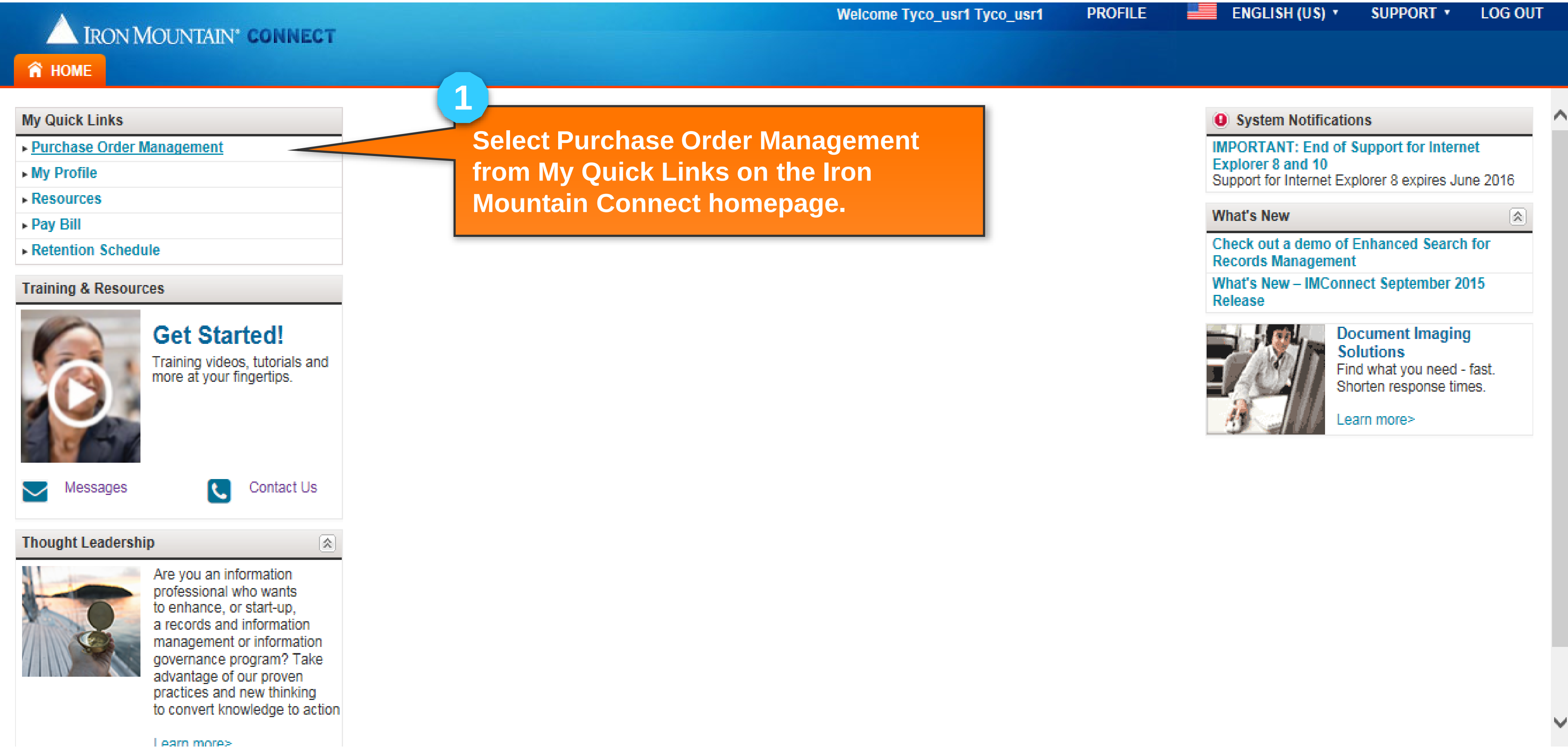
Iron Mountain Connect Purchase Order Management enables you to create and manage purchase orders independently. Our wizard walks you through the process, step-by-step, to ensure that you have captured all required information.

Use this guide to learn how to:

- Create new purchase orders
- Replace existing purchase orders
- Search for and view existing purchase orders
- Customize the purchase order results screen

Please note that purchase order functionality is being built incrementally, and that functionality will grow in future releases.

Creating a Purchase Order



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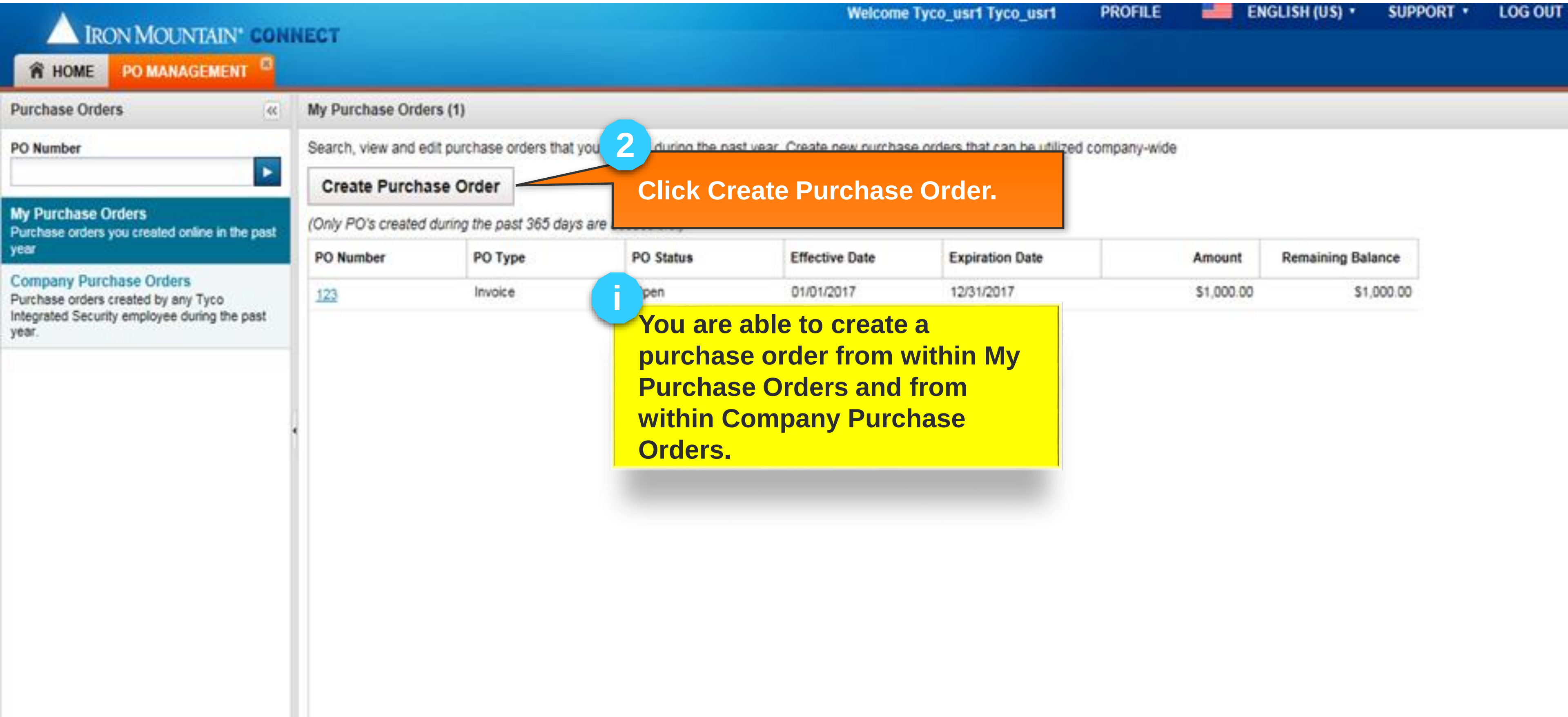
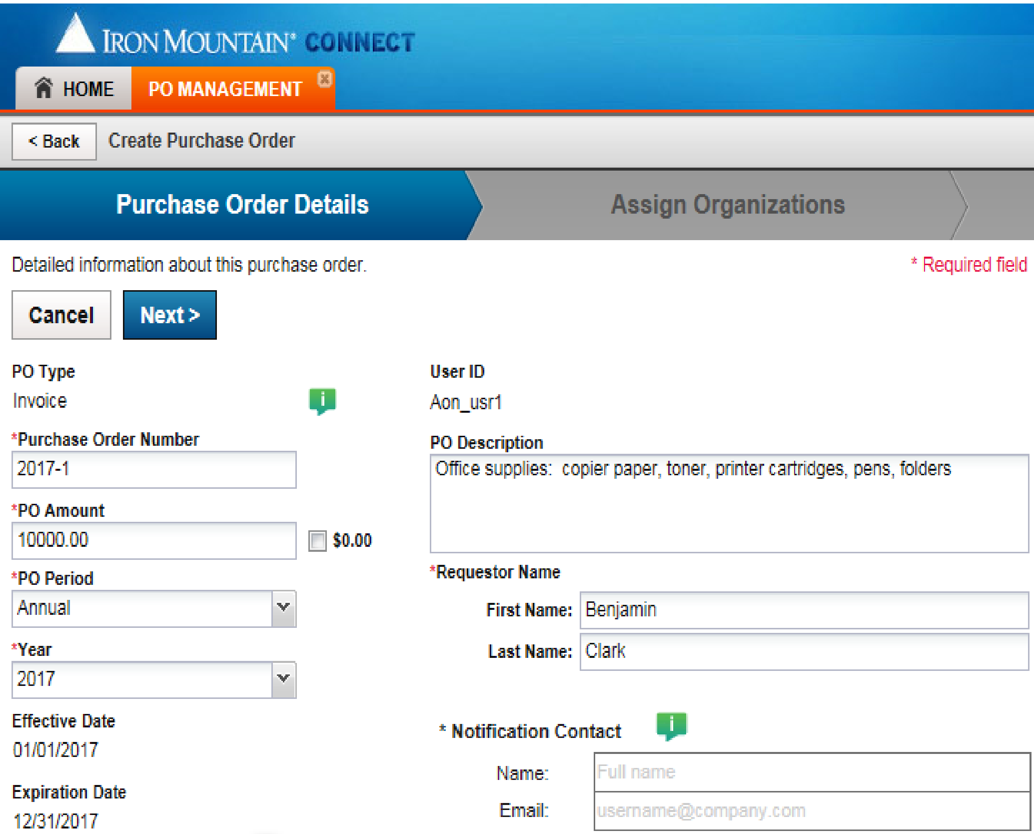
Select Purchase Order Management from My Quick Links on the Iron Mountain Connect homepage.

Creating a Purchase Order



Creating a Purchase Order: Enter PO Details



3 Enter the purchase order details:

a Assign a Purchase Order Number that will be used for tracking purposes. Special characters and spaces are not permitted.

b Enter the total monetary amount allocated to the PO. Click the 0.00 checkbox if the PO is open-ended or if your organization does not use POs to track monetary amounts.

c Select the time period the PO will be valid. Your selection determines which associated time period fields are required. Set the PO Period to Custom to enter a timeframe not listed on the dropdown. Current POs are candidates for replacement.

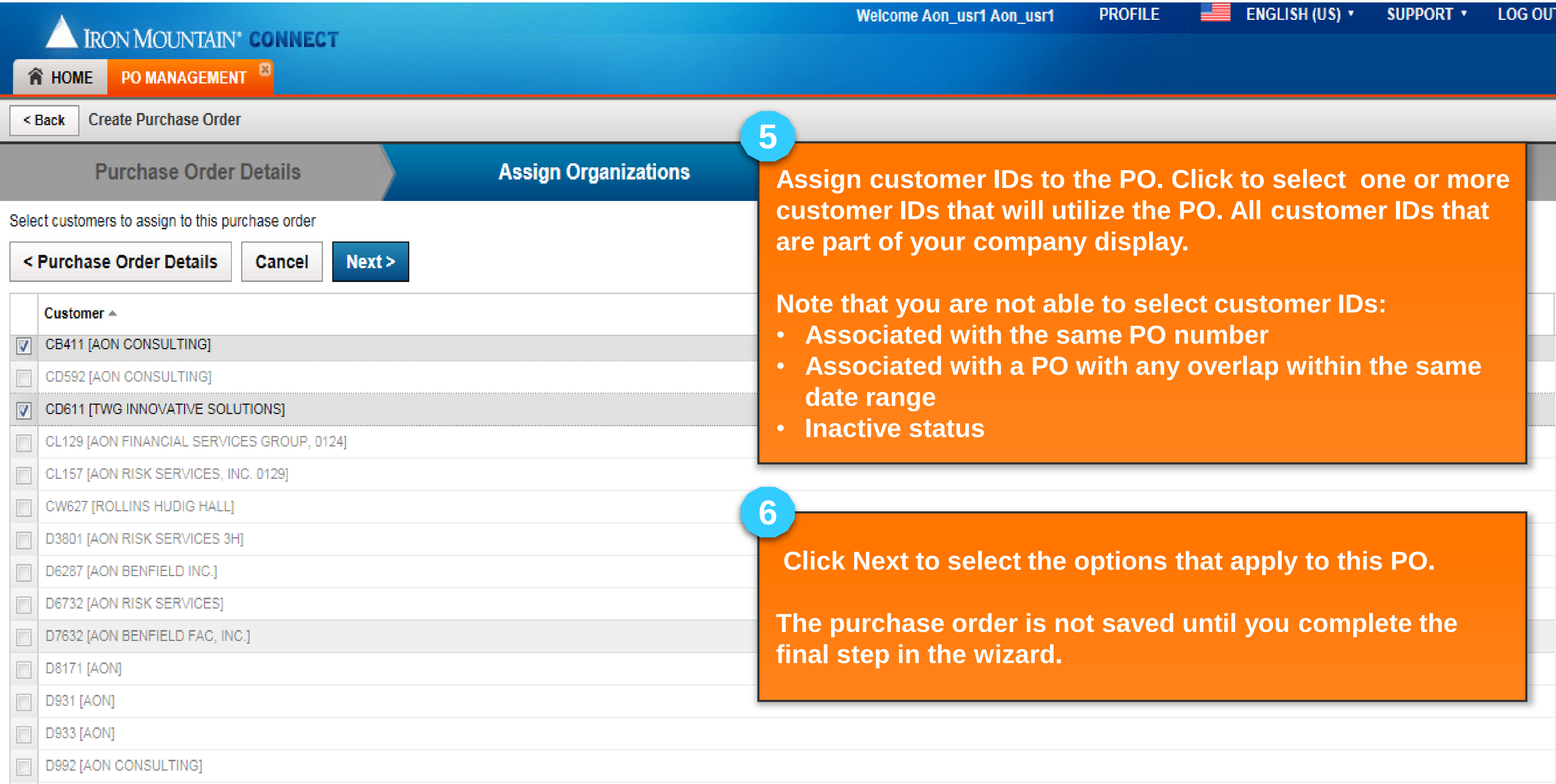
d Describe the purpose of the PO, which can include location, products and services.

e The Requestor Name and Contact Information defaults from your User Profile. Change this as necessary.

4 Click Next to assign organizations to the purchase order.

The purchase order is not saved until you complete the final step in the wizard.

Creating a Purchase Order: Assign Organizations



5

Assign customer IDs to the PO. Click to select one or more customer IDs that will utilize the PO. All customer IDs that are part of your company display.

Note that you are not able to select customer IDs:

- Associated with the same PO number
- Associated with a PO with any overlap within the same date range
- Inactive status

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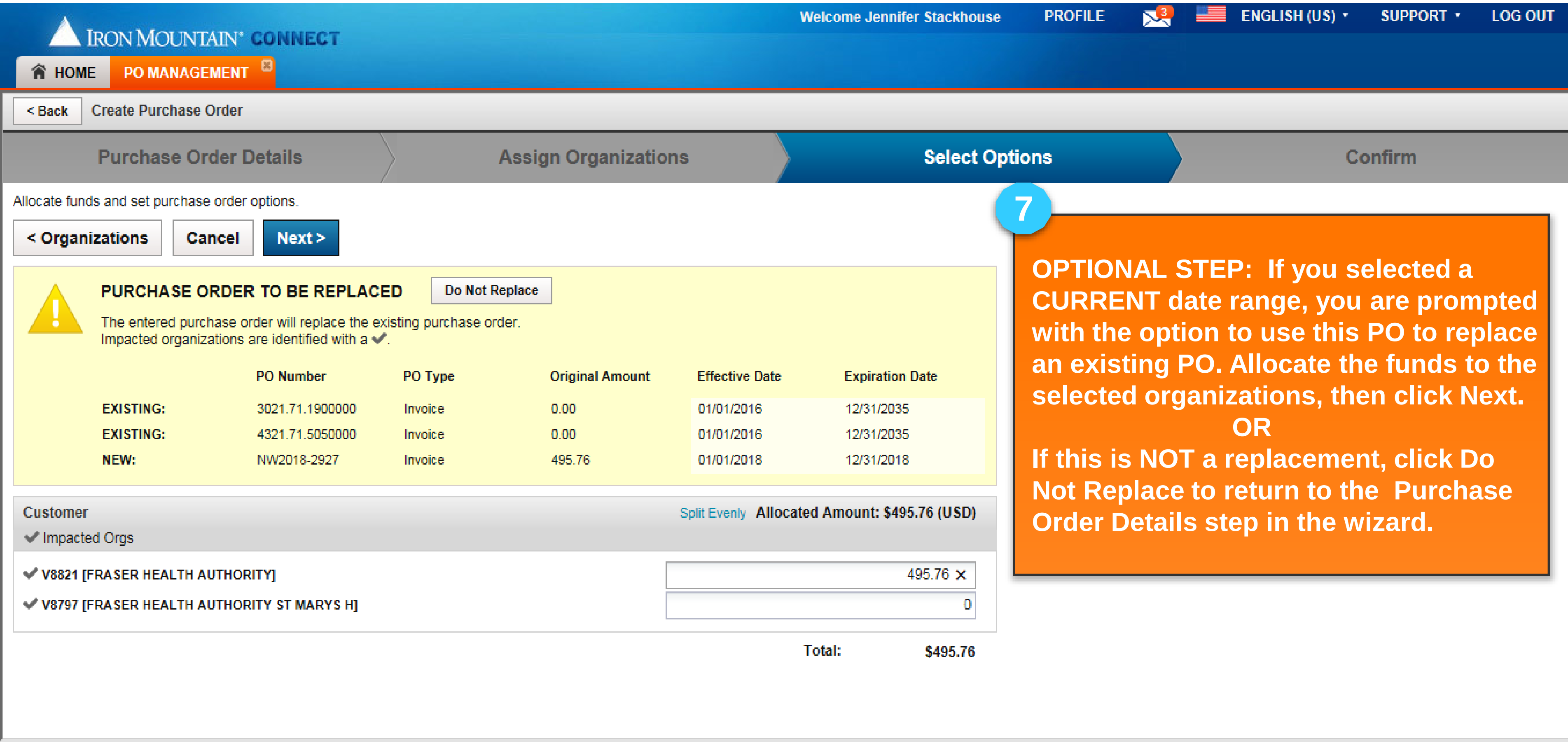
Click Next to select the options that apply to this PO.

The purchase order is not saved until you complete the final step in the wizard.

Creating a Purchase Order: Assign Organizations

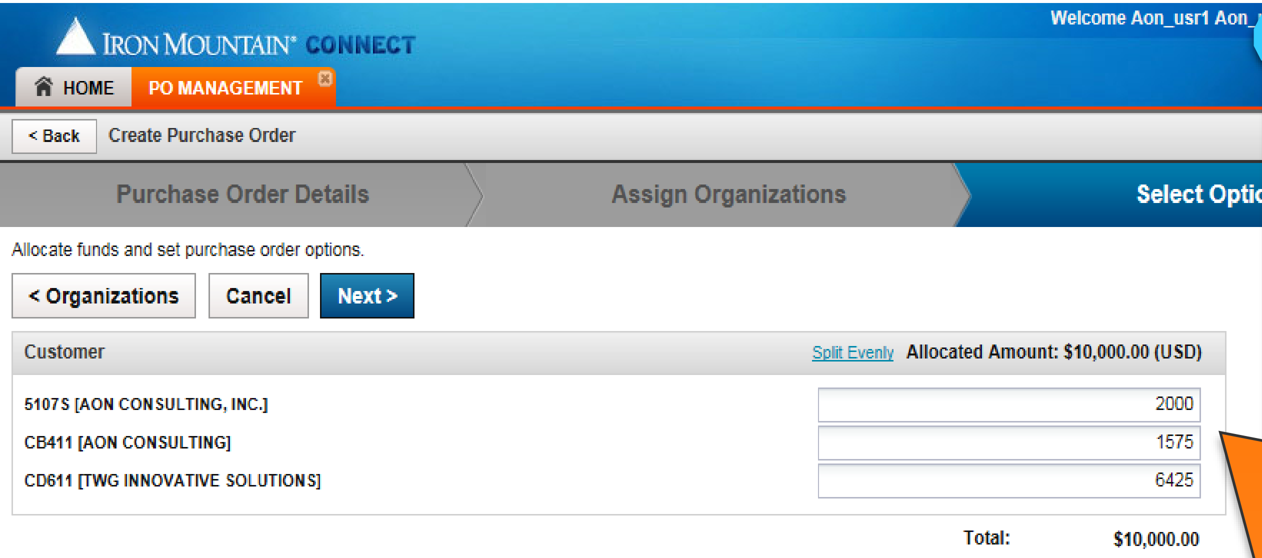


OPTIONAL STEP: If you selected a CURRENT date range, you are prompted with the option to use this PO to replace an existing PO. Allocate the funds to the selected organizations, then click Next.

OR

If this is NOT a replacement, click Do Not Replace to return to the Purchase Order Details step in the wizard.

Creating a Purchase Order: Set Options



8

Set the PO allocation amounts:

- If this PO is for a single customer, the Allocated Amount defaults from the Amount in the PO Details step. To update it, use the back buttons to return to the PO Details screen.
- If this PO applies to more than one customer:
  - Enter an amount for each customer. The total amount must equal the Allocated Amount.
  - Click Split Evenly to evenly distribute the money allocated to the PO between the customers.

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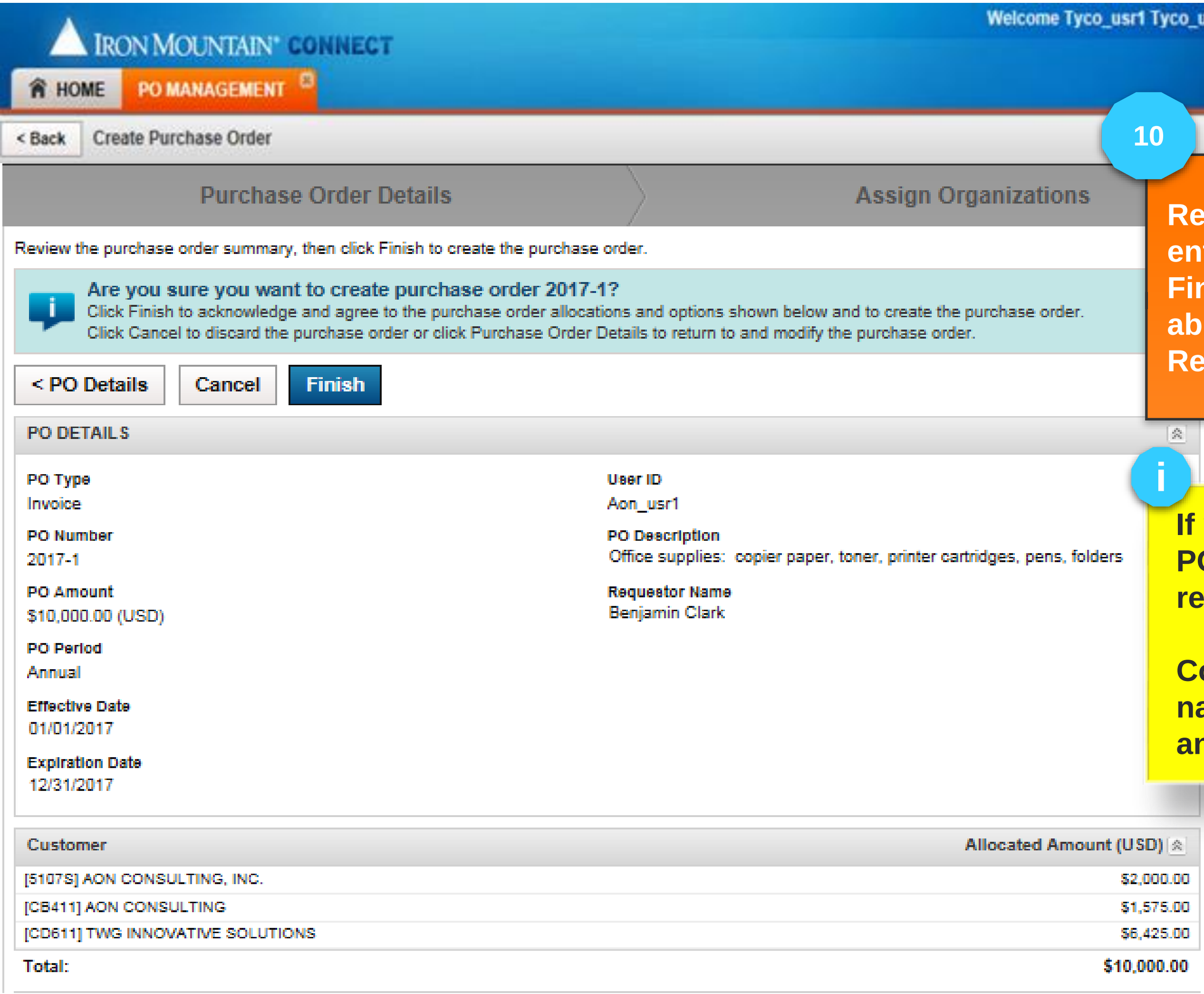
Click Next to confirm the information and options on the PO.

The purchase order is not saved until you complete the final step in the wizard.

Creating a Purchase Order: Confirm & Finish



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Review and confirm that the information entered on the PO is correct, then click Finish. Once the PO is created, you are able to search and view it from the Search Results screen.

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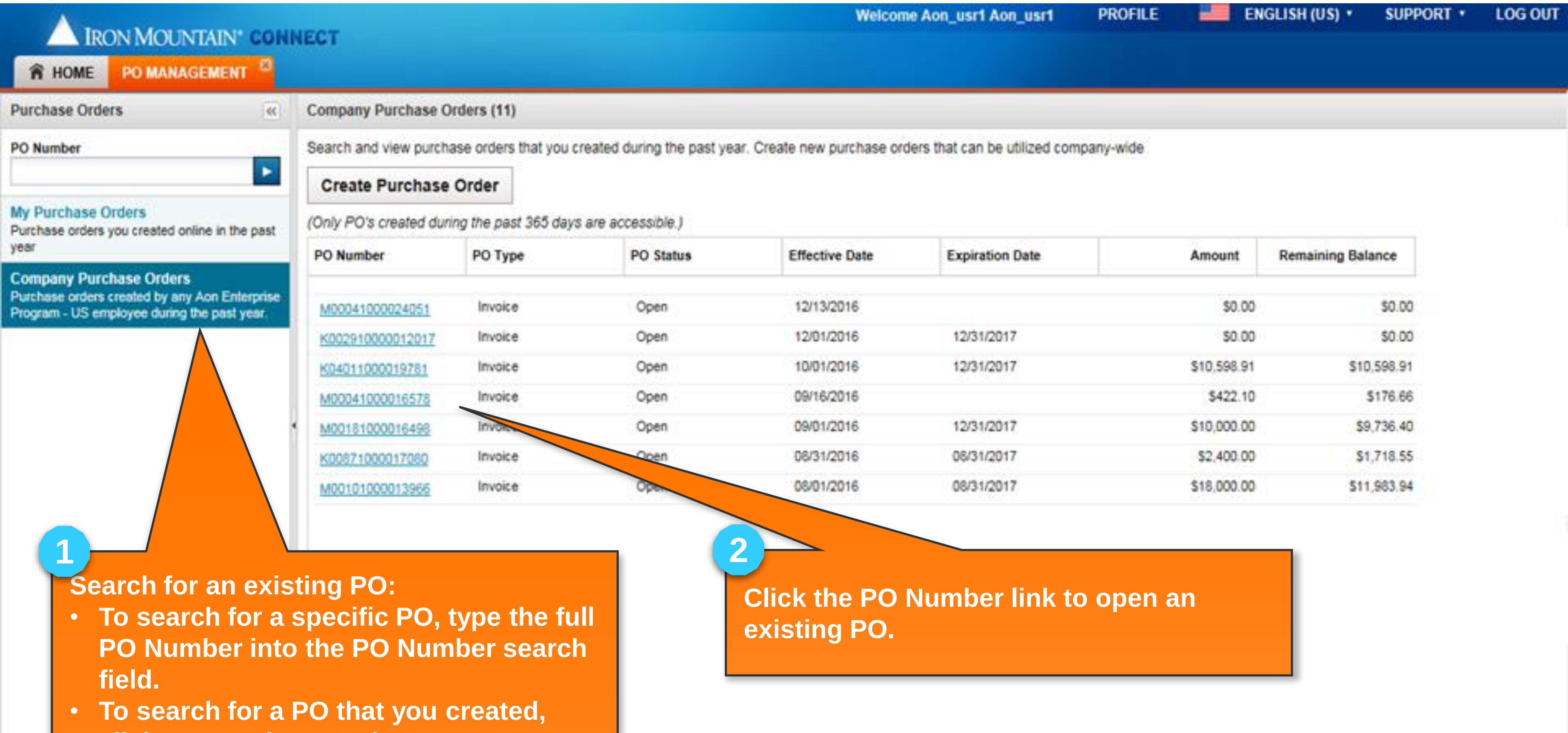
If you need to correct information on the PO, click the <PO Details back button to return to the previous step in the wizard.

Continue to click back buttons to navigate to the appropriate wizard step and make the correction.

Viewing & Editing an Existing Purchase Order



PO Number	PO Type	PO Status	Effective Date	Expiration Date	Amount	Remaining Balance
M00041000024051	Invoice	Open	12/13/2016		$0.00	$0.00
K002910000012017	Invoice	Open	12/01/2016	12/31/2017	$0.00	$0.00
K04011000019781	Invoice	Open	10/01/2016	12/31/2017	$10,598.91	$10,598.91
M00041000016578	Invoice	Open	09/16/2016		$422.10	$176.66
M00181000016498	Invoice	Open	09/01/2016	12/31/2017	$10,000.00	$9,736.40
K00871000017080	Invoice	Open	08/31/2016	08/31/2017	$2,400.00	$1,718.55
M00101000013966	Invoice	Open	08/01/2016	08/31/2017	$18,000.00	$11,983.94

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Search for an existing PO:

- To search for a specific PO, type the full PO Number into the PO Number search field.
- To search for a PO that you created, click My Purchase Orders.
- To search for a company PO, click Company Purchase Orders. Company POs include POs that you created.

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Click the PO Number link to open an existing PO.

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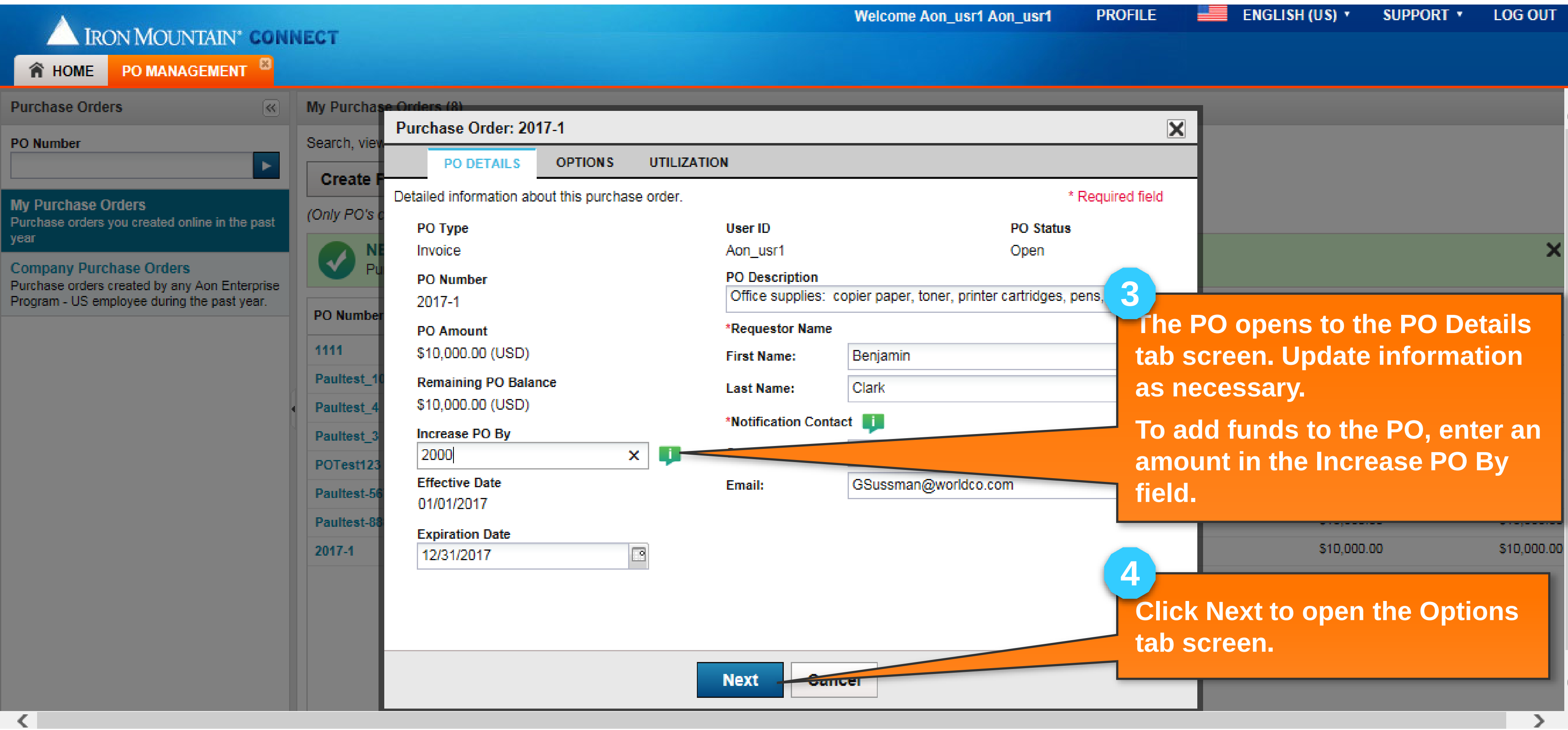
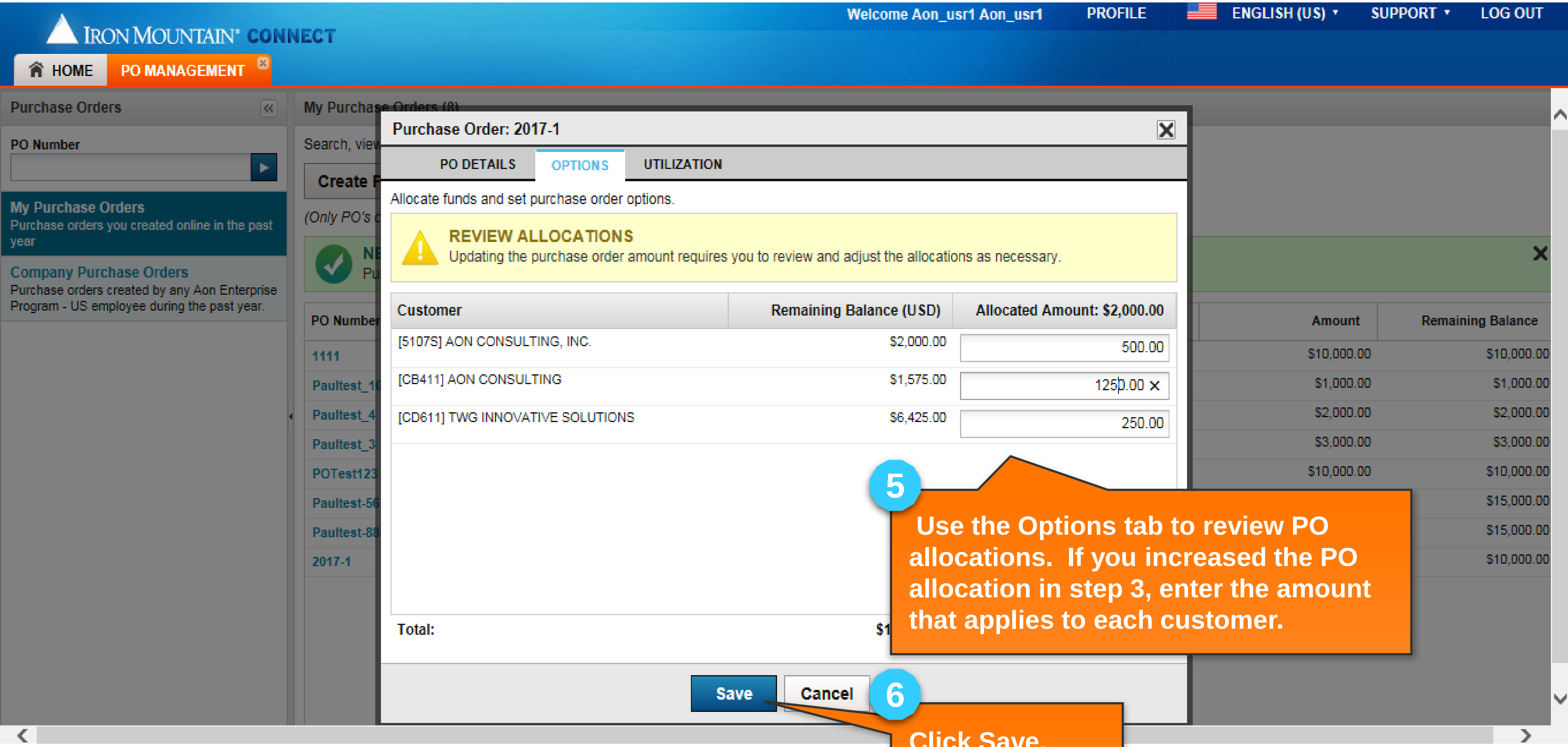
Viewing & Editing an Existing Purchase Order



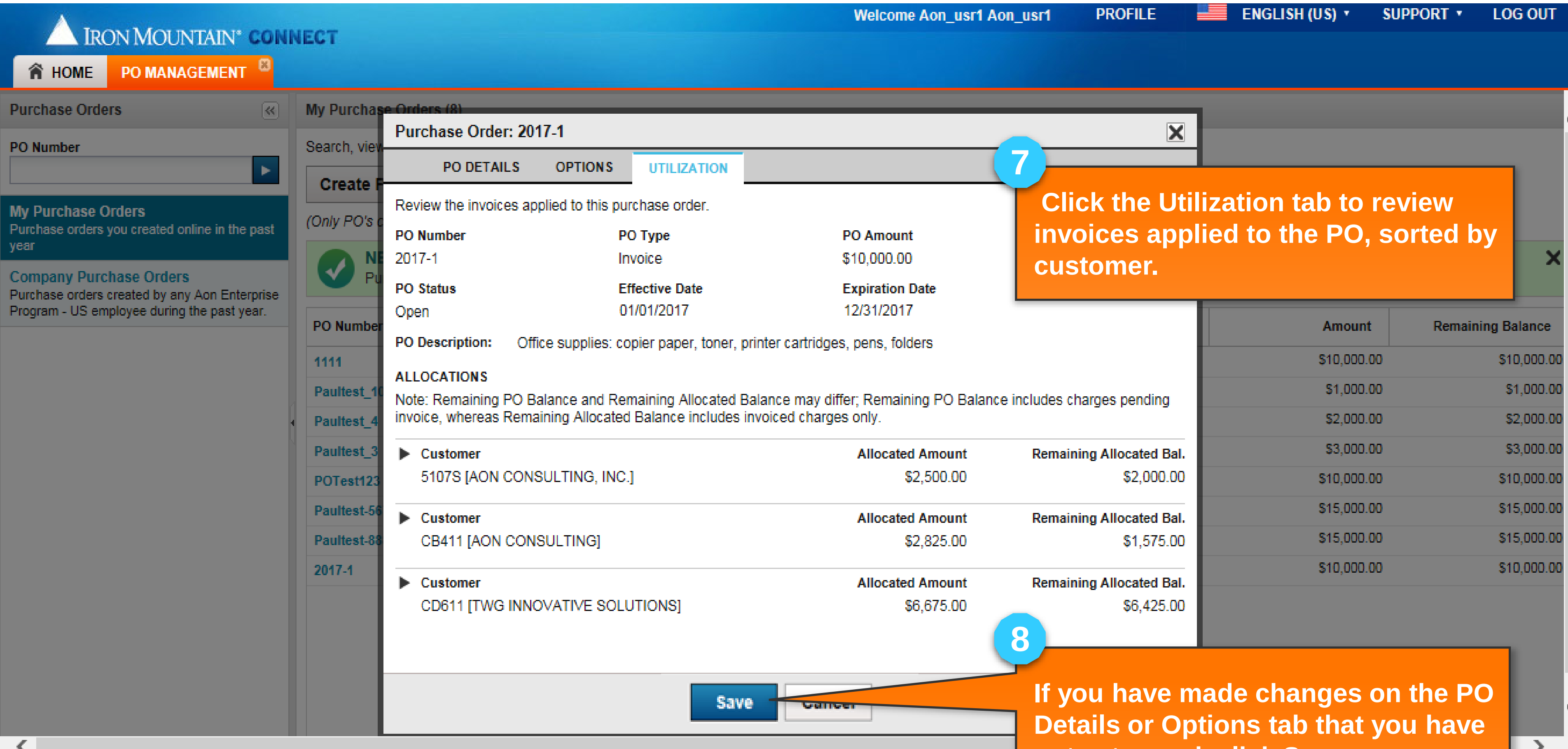
Viewing & Editing an Existing Purchase Order



5 Use the Options tab to review PO allocations. If you increased the PO allocation in step 3, enter the amount that applies to each customer.

6 Click Save.

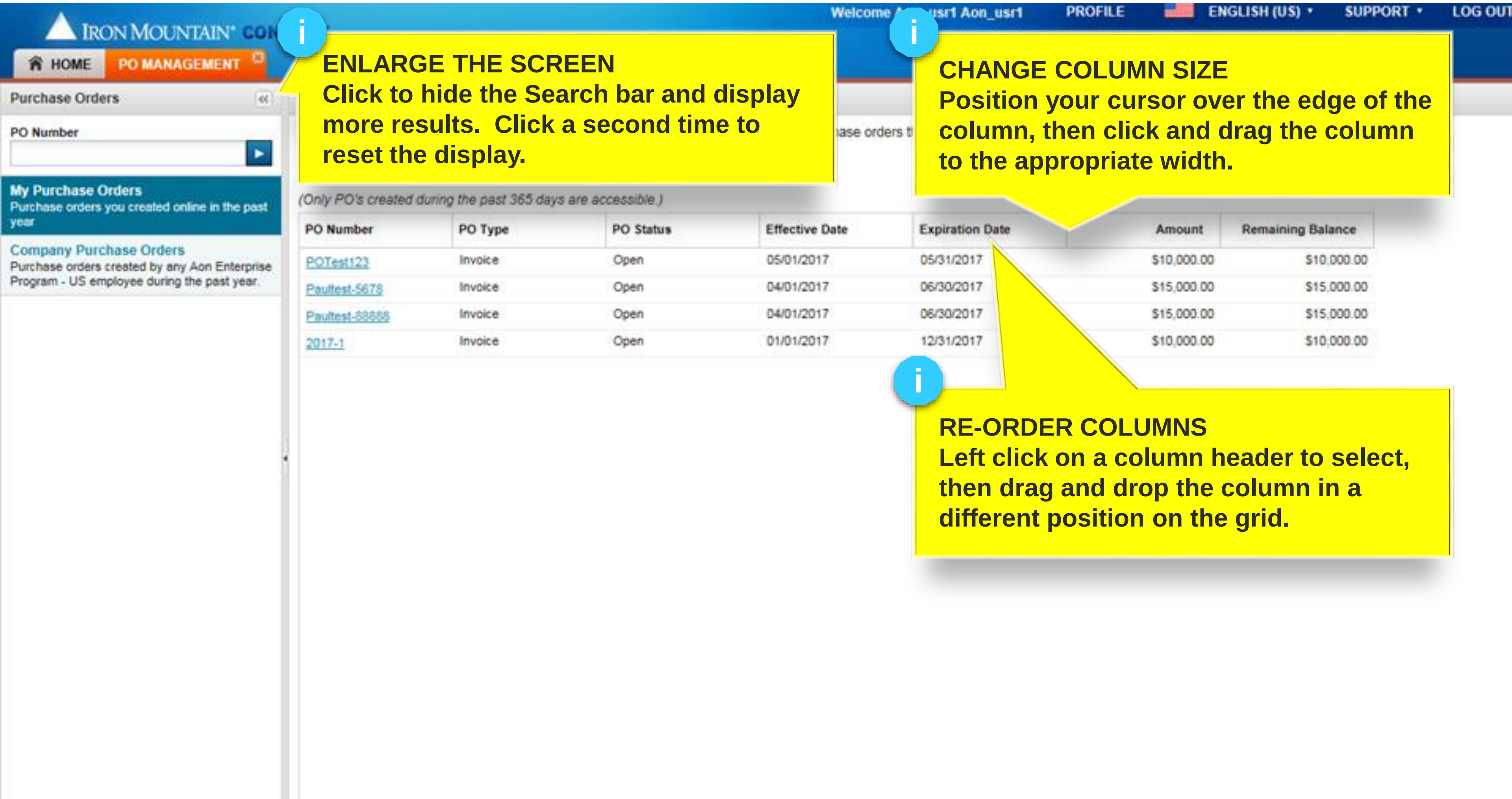
Viewing & Editing an Existing Purchase Order



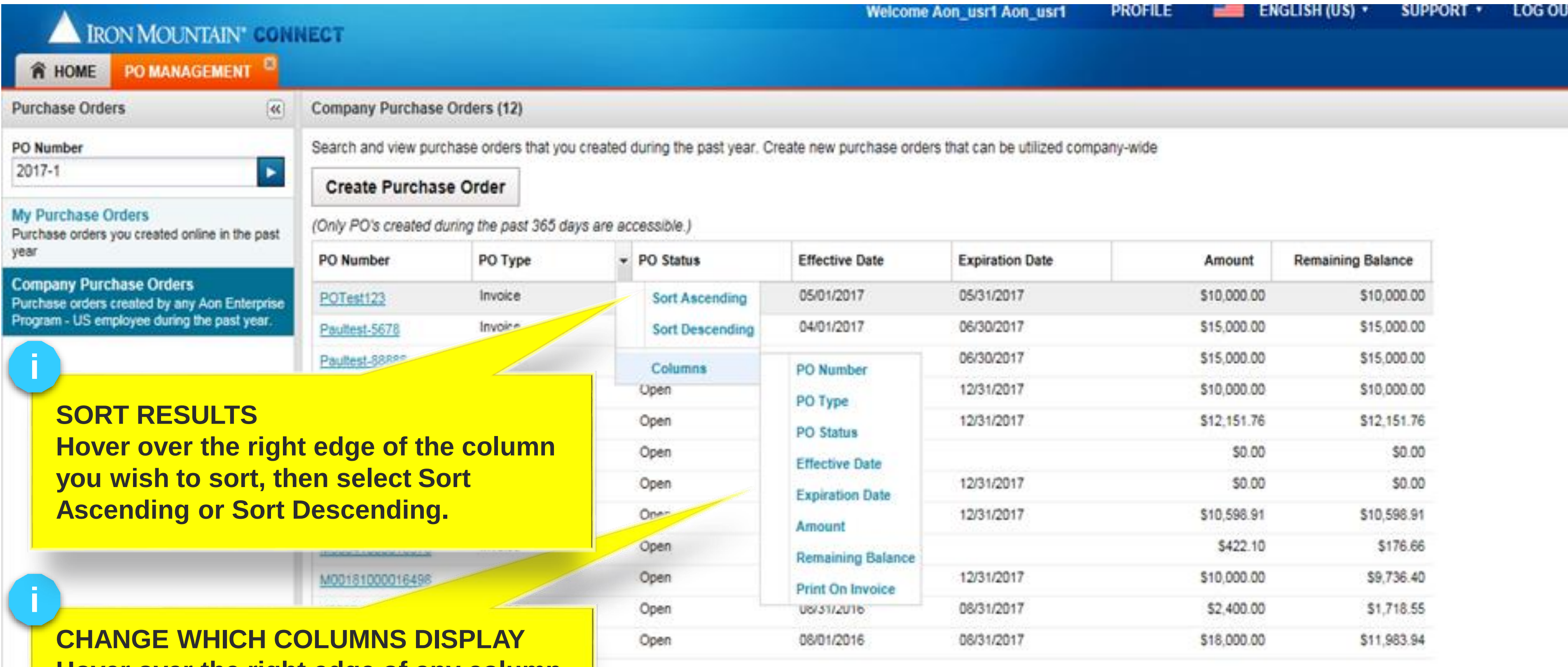
7 Click the Utilization tab to review invoices applied to the PO, sorted by customer.

8 If you have made changes on the PO Details or Options tab that you have not yet saved, click Save.

Customizing the Purchase Order Grid Screen



Customizing the Purchase Order Grid Screen



SORT RESULTS
Hover over the right edge of the column you wish to sort, then select Sort Ascending or Sort Descending.

CHANGE WHICH COLUMNS DISPLAY
Hover over the right edge of any column, then move your cursor over Columns on the dropdown.

Click the checkbox to the left of columns you want to display. Click a second time to remove the column from the display.