

Finding POs/GMs in 201

As discussed briefly in the **Receiving Process (Step 9)**, most POs/GMs that are ready to be received and do not require modification will already appear in the **301 tab** (also known as the purple tab) in Win PRISM.

However, there will be situations where a PO/GM **does not appear in 301**. When this happens, the **201 tab** (also known as the blue tab) is used to locate or create the PO/GM so receiving can continue.

This section explains how to properly find POs/GMs using the 201 tab when they are not available in 301.

What is the 201 Tab?

The **201 tab (Blue Tab)** is used to **locate and create Purchase Orders**. Purchase Orders must exist before items can be received into the system.

While the layout of the 201 tab looks like the 301 tab, the purpose is different:

- 201 is used to find/create and or post POs (if one needs to be created)
- 301 is used to receive and post POs/GMs

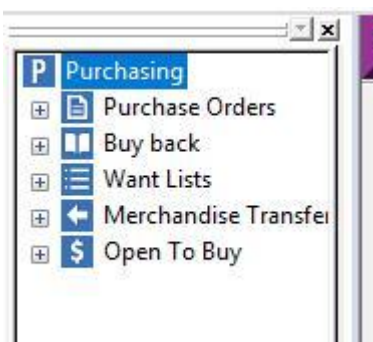
Accessing the 201 (Blue Tab)

1. Log in to Win Prism using your credentials.
2. Navigate to the 201 tab, also known as **Tab 2** or **Purchase Orders**.
3. This screen will look the same as the 301 tab, but 201 is used specifically to create and locate the POs used during receiving process or really any process while working within the bookstore.



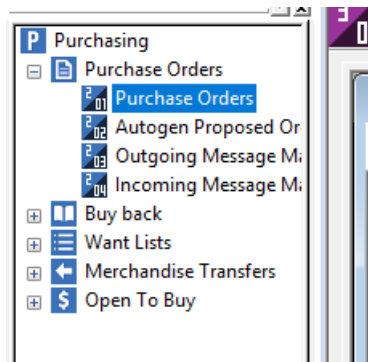
In the red circle is the blue tab or 2, this is within Win Prism and where we will find POs/GMs that **AREN'T** in 301

4. Once you click the blue tab or 2 tab it should look something like this:



Searching for PO/GM in 201

Click the **+** icon, then select **Purchase Orders**.
This will open the Purchase Order search screen.



Depending on the information you have, there are **three different ways** to search.

Option A: PO/GM Available on Invoice

If the invoice already lists a **PO or GM number**:

1. Enter the PO/GM number directly into the search bar (located near "All Locations")
2. Press **Enter**
3. The PO/GM should appear if it exists in the system

Location	Sys	O	SKU	Cat #/ISBN	Description	Title	Term	Units	Pack	Qty	Req Qty	Ext. Cost	Retail	Order Date	Pricing
...															

(Above is how the 201 tab/ screen would look like if you searched using the PO/GM you have)

Once found, continue with printing the receiving document and preparing the order for verifying/counting.

Option B: Invoice Available, but No PO/GM Listed

If an invoice is present but **no PO or GM number is listed**, use item-level information from the invoice to search.

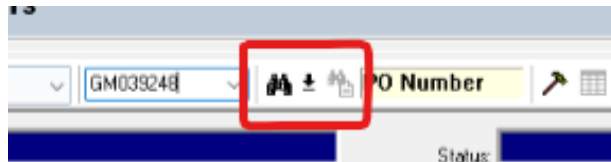
You may use:

- **XERF / Barcode**
(Example: 073390009137)
- **SKU or Catalog Number**
(Vendors label this differently; for example, Core-Mark uses SKU numbers like 43364)
- **Item Description**

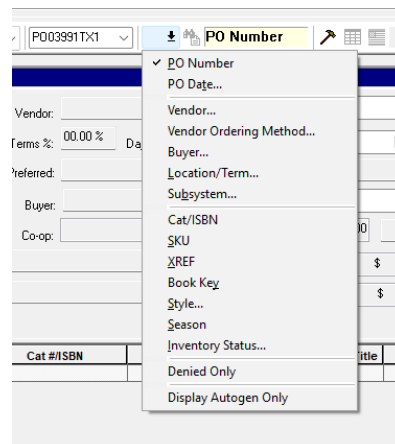
How to Change the Search Field in 201

1. While in the 201 tab, locate the search bar near “All Locations”
2. To the right of the search bar, you will see:

- A binoculars icon
- A downward arrow



3. Click the **downward arrow**
4. A list of search options will appear:



5. Select the appropriate option (SKU, Vendor, Description, etc.)

Once selected, the highlighted search field will change from **PO Number** to the option you chose.

This same process can be used to search by:

- SKU
- Vendor
- Description
- Other available fields

Enter the information and press **Enter** to search.

Option C: No Invoice Available

If **no invoice is available**, but the **vendor's name is known**:

1. Identify the vendor from the shipping label on the box
2. Search by **Vendor name** in the 201-tab using the same dropdown method described in Option B
3. Review results to locate the correct PO/GM

If needed, refer to **Option B** to narrow results using item-level details.

After You Find the PO/GM

Once a PO/GM is located using **Option A, B, or C**, follow the steps below:

If the PO/GM Is Empty:

- Create the PO/GM using the invoice information you have
- If unsure, ask a **shift lead or manager** before proceeding

If the PO/GM Is Not Empty:

1. Confirm with a **shift lead or manager** that:
 - The PO/GM is correct
 - The items match what was received
2. Click the **hammer icon** to post the PO/GM
3. Click **Post**
4. Print the **Receiving Document**

5. Attach the printed document to the corresponding boxes

This process is the same regardless of how the PO/GM was found.

Use this section ONLY if Options A, B, and C do not work

Extra Notes: Last Resort (Red Tab – 101 / 102)

If **none of the options above work**, there is one final method that can help locate item information needed to complete **Option B**.

This involves using the **Red Tab (Tab 1)** in Win PRISM.

You may hear employees say:

- “Did you check 101?”
- “Try looking in 102.”

Understanding 101 vs 102

- **101 and 102 look nearly identical**
- **102 shows cost and retail**
- **101 does not**
- You **cannot add XERF/barcodes in 102**, only in 101

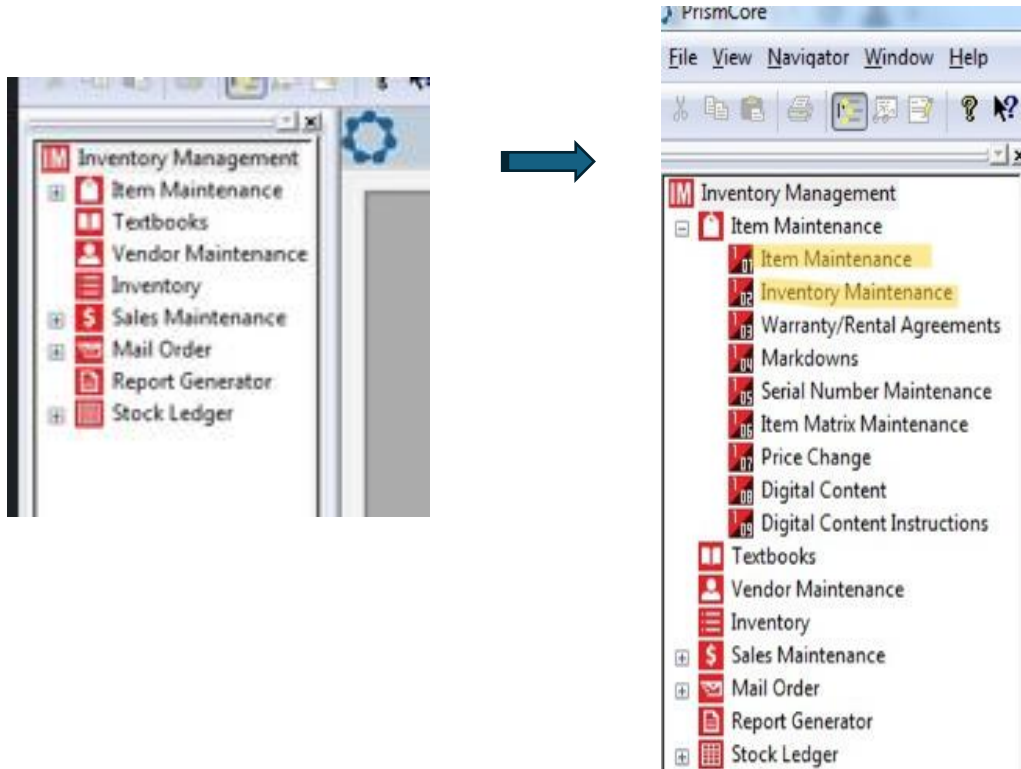
Finding an Item in the Red Tab (101 / 102)

Step 1: Click on the **Red Tab (Tab 1)**.

You will be taken to the main Item Maintenance screen.



Step 2: Click the first “+” option, labeled Item Maintenance.



Step 3: Select either 101 or 102.

Once opened, locate the tabs at the bottom left of the screen.

IMPORTANT: Make sure you are on the GM tab, unless you are searching for a textbook.

Step 4: In the search bar, click the downward arrow and ensure the search field is set to Description.

Step 5: Use the symbol “%” for a narrower search.

Example:

If searching for a blue pen, type:

%PEN%BLUE% (ADD PIC)

The % symbol allows the system to return any item that contains both words in its description.

Step 6: Press/hit Enter. The system will display one result at a time.

Step 7: To view additional results:

- Use the **green/black navigation arrows**, or **(ADD PIC)**
- Click the **binoculars with paper icon (ADD PIC)**

Step 8: Once the correct item is found:

- Copy the **SKU, Catalog Number, or XERF**
- The safest option is to copy the **SKU**
- Return to **201** and complete **Option B**

Reminder

Option B (searching by SKU, XERF, or description) can also be used within the 301 tab in certain situations.

When in doubt at any point, stop and ask a shift lead or manager before proceeding.