



CHECKLIST: SMOOTH ORDER PROCESSING



What are the requirements for a purchase order ("PO")?

At PTC, we would like our customers to have a smooth experience whenever they engage with us. One of our goals, is to keep the procedures and paperwork to a minimum. However, as a global company, some paperwork is required. What we can do, though, is to make the process as transparent for you as possible, so you can take the required steps and avoid unnecessary back and forth with our renewal experts.

Does your company require issuing a PO?

At the beginning of your renewal process, please verify your company's requirements. Many customers are required to issue a PO for their renewals despite having Auto Renewal language present in an agreement. We recommend you contact your Accounts Payable department to understand your company requirements for a PO to ensure prompt payment. Please inform your Renewal Advisor before your renewal is due so we can ensure enough lead time for processing.

What if the renewal is not as "straightforward"?

In case you need to reconfigure your contract, or make changes to your contract term, your Renewal Advisor will be able to advise on any required steps. It is important though, that these circumstances are being discussed early on. We recommend you review your existing contracts mid-term when your Renewal Advisor usually reaches out for his regular check in. Of course, our team is available for any and all open questions at any time throughout your contract period!

Contact us

Our Renewal Advisors are here to help you get the most value from your PTC subscription. Please don't hesitate to [contact us](#) with any questions around your contract, renewal or additional needs.

Give feedback

Is this information helpful for you? Do you have any feedback on your engagement with your Renewal Advisor? We would like to [hear](#) from you!

What information is needed to ensure there is no delay to your order?

A customer PO needs to carry the following information. By having all details in place upon submission, your Renewal Advisor should be able to get it processed without delay!

The purchase order....

- references the PTC quote number
- is made out to the proper PTC entity as listed on your quote
- contains the Bill to and Ship to addresses
- contains payment terms which match your customer agreement. Note that PTC cannot accept customized Terms & Conditions.
- contains accurate data that match the PTC quote (e.g. PO total, service period/end date, products listed) or
- is signed (if applicable)

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