## **E-Procurement System Tutorial: Creating a Punchout Purchase Order**

E-Procurement is an online system, which allows the user to purchase products/services from vendors.

When purchasing from a punch-out vendor, you are sent directly to the vendor's website. From the Home Screen of E-Procurement, click on a Punch-out vendor to start shopping. This will bring you directly to the vendor's site.

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1		Simple Advanced		Go	to: Non-Catalog Form   Favorite	s   Forms   Shop   Quick Orde	r Browse: Suppliers   Categ	ories   Contracts   Chemicals	
6		Bearch for products, suppliers, forms, part nu	mber, etc.						
<u>8</u>	Annou	incements		Showcase Services/Links					<b></b>
血場	EFFECTIVE JANUARY 1, 2021: ALL of cost, must be competitively bio promotional item orders are listed i	promotional item orders, regardless d. New thresholds for quoting in the Promotional Items Policy icon scent below. Click on the Promotional		PPE General Supplies	PPE Request for Disinfectant Wipes	TMP Worldwide Order Form	Non-Catalog Order Form	RFX Request Form	Sole Source Order Form
ф В Ш	COVID19: Centralized Purchasi How to request Bulk Ordered F To request PPE which has been o Forms are available to streamline	PPE items: entrally purchased, PPE Request		*For BOA Cardholder Use Only*	Bankof America Bank of America	Children River	CONTRACT Contract Director	Enterprise Enterprise Rent a Car	
¥	Please click here for instructions Please select the icon "PPE Gener showcase to request: • Disposable Face Covering • Face Shields			IT/Computer/Peripherals/Ph	oto/Office Supplies	CDW Government, Incorporated		Connection	
	Gloves     Gowns     Infrared Thermometers					see avenue, norpolated	Continuency Corp		

#### Navigating the Vendor Website:

Search for the desired items on the vendor's site.



Change the desired quantity of the item and click **Add to Cart**. Then click **Continue Shopping** if additional items are needed <u>OR</u> click on **Continue to Checkout**.



If you continued shopping and are ready to complete your order, click **Checkout** towards the top right of the screen.

QUICK ORDER		CART
CHECKOUT	0 Items	\$0.00
WHERE'S	5 MY ORDER?	

### **Shopping Cart:**



Multiple items can be added from as many vendors as desired to the cart. This can be done for punch out and non-catalog vendors as well.

To remove an item, click on the **checkbox** located to the far right of each line item. Click the down arrow to the right of the checkmark at the top right of the line item list and select **Remove Selected Items.** 





Once all desired items are in your cart\*, click **Checkout** located in the upper right-hand corner.

\*<u>PLEASE NOTE</u>: Once you leave the Shopping Cart, you will no longer have the functionality to remove a line item from your requisition.

#### Requisition • : 3142043 A ค PO Preview Comments Attachments History Summary Draft General / ···· Internal Info 🖋 🚥 Supplier Info 1 ... 🗸 Orrect these issues. You are unable to proceed until addressed. Cart Name Internal Note Note to all Suppliers 2020-12-18 momara 01 no value no value Internal Attachments Accounting Date Required: Index Add no value Required: Account Normal Required: Commodity Code Attachments for all Description Required: Requisition Type (Line 1) ppliers no value View of Order at Total (165.00 USD) ~ Prepared by Meghan O'Mara **Final Review** Subtotal 165.00 Prepared for step. 165.00 Meghan O'Mara Place Order Assign Cart . ↓ ↓ / ... 🗸 Ship To .... Bill To O Cat Far

#### Checkout/Final Review- Entering FOAPAL Values:

Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.

To adjust information, click the **Pencil icon** Then click on **Save Changes**. within the section you would like to edit.

Under the Supplier Info section, the user can add a note to the supplier by click on the Pencil icon

and entering the note within the **Note to all Suppliers** field (Please be sure the comment is not entered under the Internal Info section as the Supplier cannot view that information). Then click on **Save Changes**.

PLEASE NOTE: <u>NEVER</u> enter an Accounting Date as that will prevent the requisition from processing.

Edit Supplier Info		×
External Info		
Note to all Suppliers	1000 characters remaining	expand   clear
Accounting Date	mm/dd/yyyy	
	Save Change	s Close

To specify a **Delivery Date** (this is optional), click on the **Pencil icon** 

in the **Ship To** section. In the pop-up box, scroll down to Delivery Options and click on the calendar icon to select the date. Then click on **Save Changes**.

Search additional	Q Results Per	Page 10 ▼		
elivery Options				
xpedite				
hip Via		Best Carrier-Best W▼		
elivery Date		mm/dd/yyyy		

To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the

**Comments** tab and then click on the plus icon, towards the upper right to add a comment. The user has the option to select which document they would like the comment to appear (ie. Requisition,

Purchase Order, Invoice etc. ) by selecting the dropdown menu to the left of the <sup>+</sup> icon. If not selected it will default to All.

mmary PO Preview Comments Attachments	History			
ecords found: 0		Sh	ow comments for A	
ADD COMMENT	+			✓ ×
	This will add a comment to Attach file (optional) Attachment Type File Name		ink/URL	
1000 characters remaining expand   clear	File	Choose File	Upload your file	

Once the Comment is entered, click on the checkmark icon, towards the upper right of the Comment box.

# ONLY after the requisition is created and in workflow, can the user specify the person/user they would like to send the comment to.

To adjust any **FOAPAL Value** information, click the Pencil icon (located in the upper right of the corresponding box) to modify any values listed.

An Edit FOAPAL Values pop-up box will appear.

FOAPAL Values
Index Account Commodity Code Chart
Search     Q     Search     #     1       © Required     © Required     © Required

To search for available values, click on the Arrow icon open a search.

located towards the right of the field to

Please refer to additional documentation, **"Adding a Split to FOAPAL Values**" and **"Adding FOAPAL Values on Line Items**" for more information on adding multiple FOAPAL values and updating each line item.

Once completed click on the Save Changes button.

#### Line Item Changes:

To adjust Supplier/Line Item Details, click the Pencil icon (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click **Save Changes**.

1	USL ROLLING COMPUTER C	ASE	USL-B644	165.00	1 EA	165.00	··· 🗆
	🔺 ITEM DETAILS 🎽					- 1	1
	Contract:	no value		External Note	no value		
	Internal Note	no value		Attachments for	r supplier Add		
	Requisition Type	no value CRequired					
	Internal Attachments	Add					

When the Edit Line Item Details pop-up box appears it is required to select the **Requisition type**. This value is usually set as a default, but if an error appears follow the below to edit:

To open the dropdown menu click on the blue arrow in the right of the field box. Then select **Hosted/Punchout/Non-Catalog Item-Hosted/Punchout/Non-Catalog Item** and click **Save**.

Edit Line 1: Item Detail	s
1 USL ROLLING COMPUTE	Organization Values Contract Requisition
Internal Note	Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item Service Requisition - Service Requisition
Requisition Type	Required

R.

Once all edits have been completed, click on **Order** located towards the upper right of the screen.

The user will receive a requisition number and a confirming email.

#### Viewing the Requisition Status and Details:

To view requisition details after submitting click on the linked **Requisition number**:

⊘ Requisition	on 3142043 Submi	tted
Summary		Options
Requisition Number	3142043	C Print
Requisition status	Pending	Recent orders
Cart name	2020-12-18 momara 01	Return to your home page
Requisition date	12/18/2020	
Requisition total	165.00 USD	
Number of line items	1	

#### **IMPORTANT**: The **Approval**

Workflow has moved. It is no longer on a separate tab within the Requisition.

The **Approval Workflow** is showcased in the right hand panel. Use the scroll bar within the panel to view the full workflow:

Purchase Order ▼ : 3063	2005	
Status Summary Shipment	ts Receipts Invoices Contents Attachments History	
Requisition Number	3142043 view   print	Pending
		Total (165.00 USD)
Document Status		Subtotal 165.00
A/P status	Open	165.00
Workflow	♂ Pending Wait for Purchase Order Post	Related Documents
The system will distribute purchase	e orders using the method(s) indicated below:	Requisitions: 3142043
cXML (Electronic Integration)	no value	What's next?
Manual		Workflow
Supplier	none	Show skipped steps
	view	Submitted 12/18/2020 6:11 PM Meghan O'Mara



Click the **History** tab located at the top of the requisition to view details of the workflow.

Click the **Summary** tab and scroll to the bottom (in the Line Item section) to retrieve the **Purchase Order** number.

1 Item
Staples · 1 Item · 165.00 USD
▲ SUPPLIER DETAILS
PO Number 30632005
Pricing/Discount Code no value

equisitio Summary	on • 3142043 Comments		History						
Start dat mm/dd/yyyy Requisiti	ion 🔻	End date		Action	T	User		Q	
Filter	Clear All Filters								Export CSV 20 Per Page
Line No	Date/Time 🗸	User	Step(s)	Action	Field Name	From	То		Note
	12/18/2020 6:11:29 PM	System		Requisition approval process completed					
	12/18/2020 6:11:29 PM	System	Create PO	PO Created	PO#: 30632005				
	12/18/2020 6:11:25 PM	Shuana Thompson	Purchasing Approval	Requisition approved					