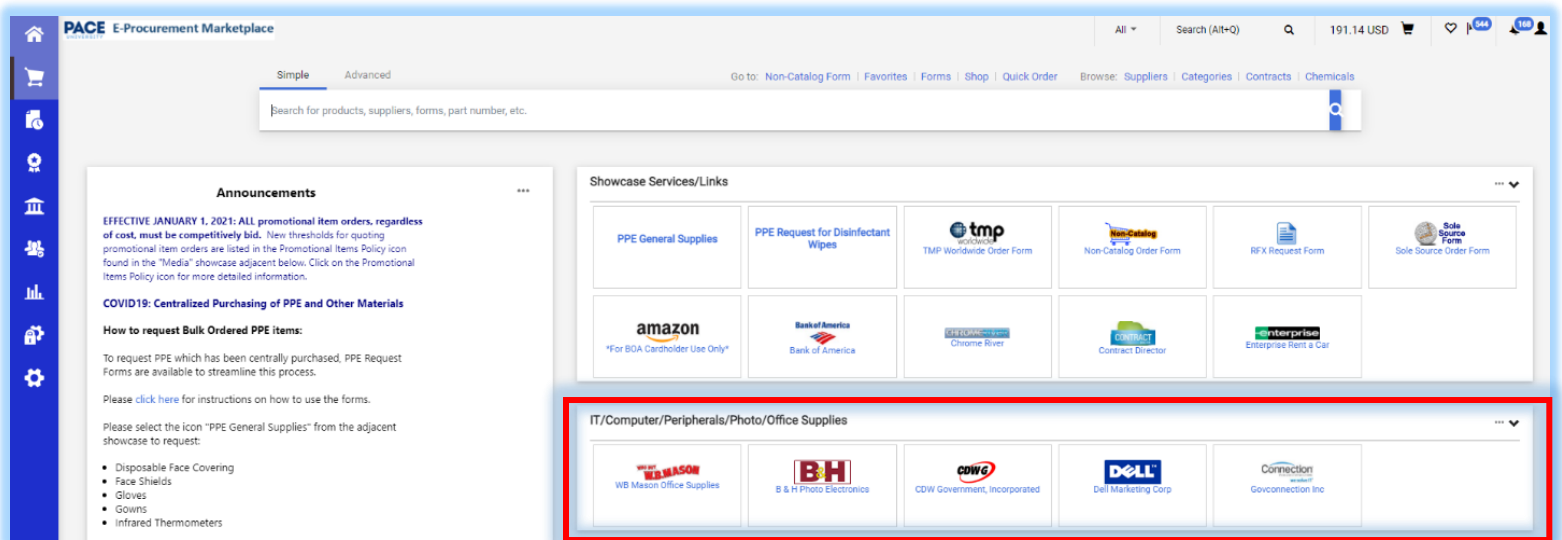


E-Procurement System Tutorial: Creating a Punchout Purchase Order

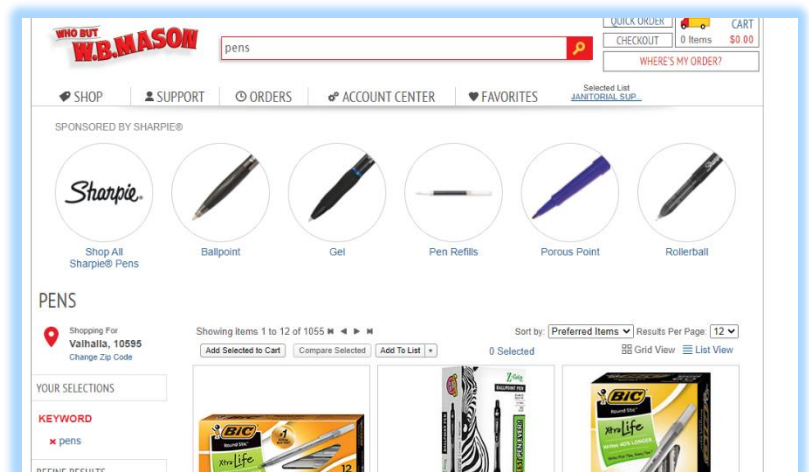
E-Procurement is an online system, which allows the user to purchase products/services from vendors.

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.

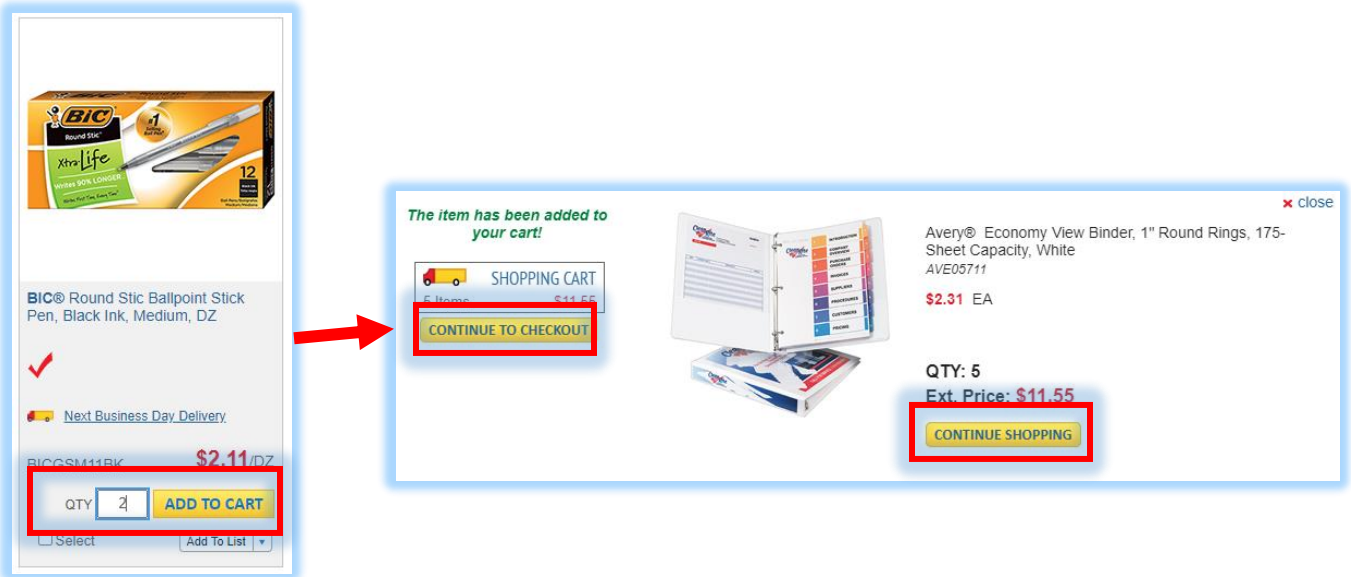


Navigating the Vendor Website:

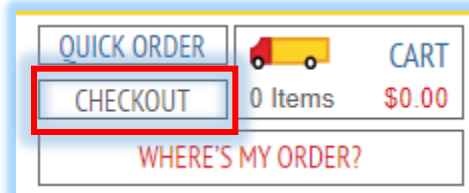
Search for the desired items on the vendor's site.



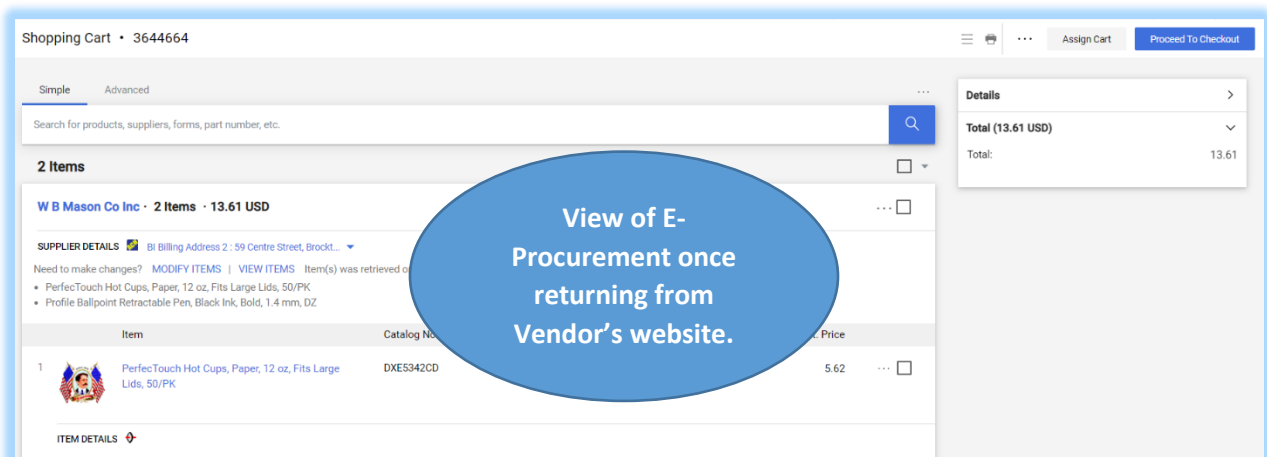
Change the desired quantity of the item and click **Add to Cart**. Then click **Continue Shopping** if additional items are needed OR click on **Continue to Checkout**.



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

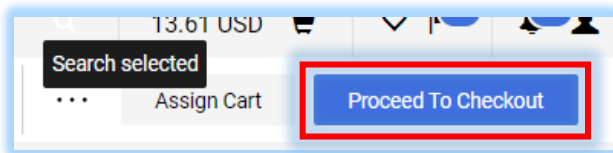
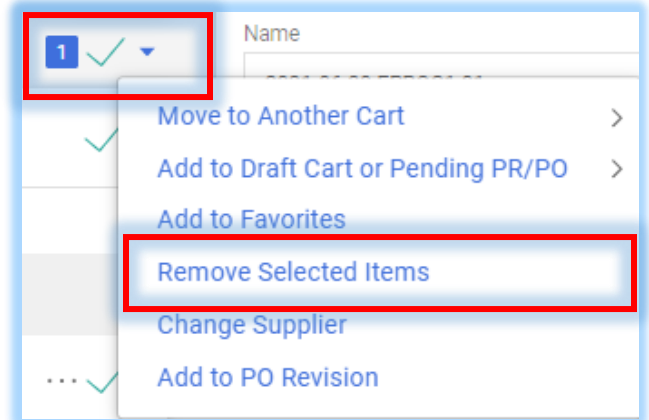


Shopping Cart:



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.

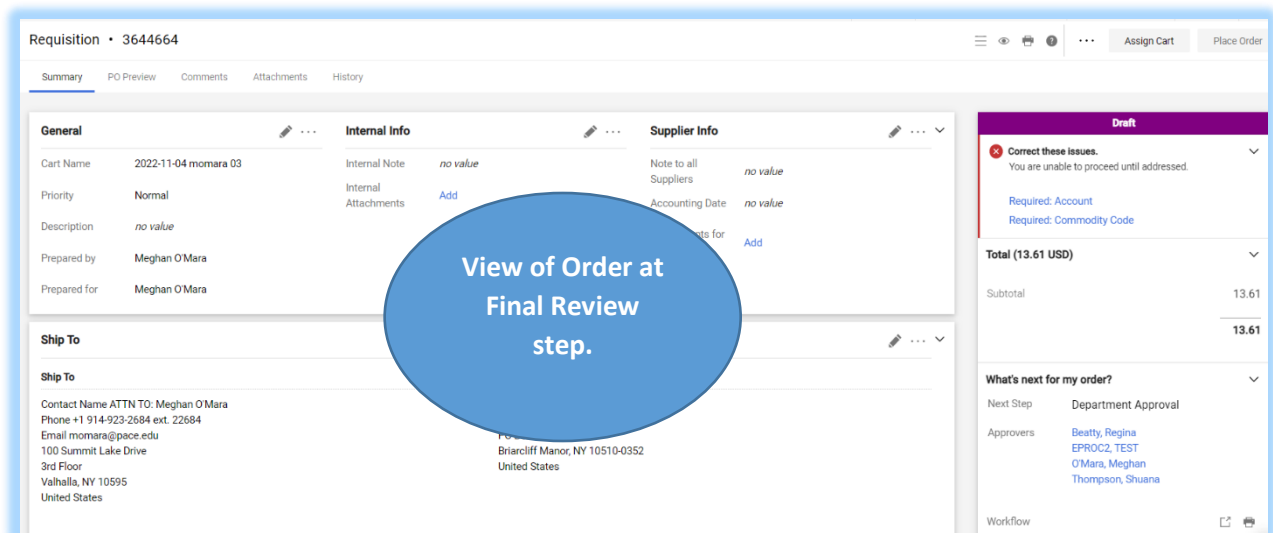
To remove an item, click on the **checkbox** located to the far right of each line item. Click the down arrow to the right of the checkmark at the top and select **Remove Selected Items**.




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

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


Checkout/Final Review- Entering FOAPAL Values:



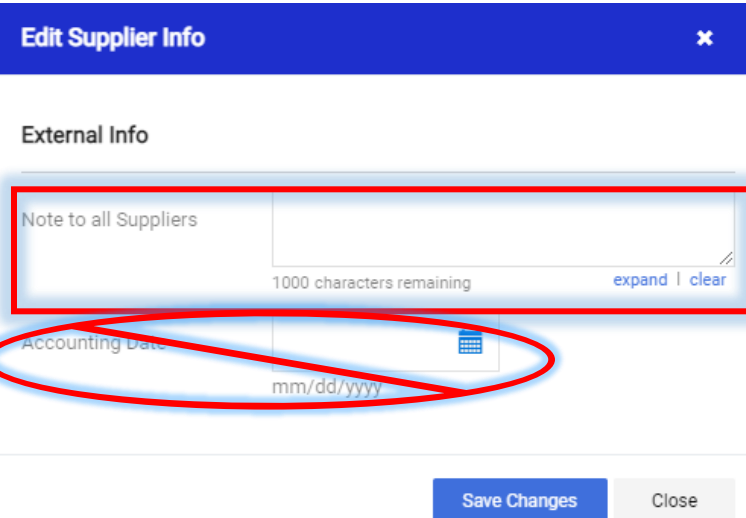
Verify all the information (Ship To, FOAPAL Values, Notes to Suppliers etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the document.

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

Under the **Supplier Info** section, the user can add a note to the supplier by clicking 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: NEVER enter an **Accounting Date** as that will prevent the requisition from processing.



Edit Supplier Info ✕


External Info

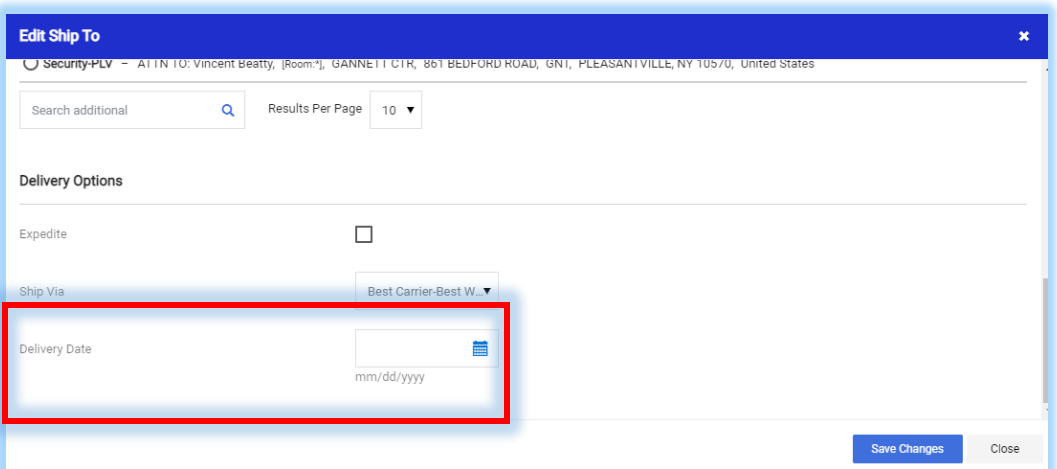
Note to all Suppliers 1000 characters remaining [expand](#) | [clear](#)

Accounting Date  mm/dd/yyyy

Save Changes 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**.



Edit Ship To ✕


Security-PLV - ATTN TO: Vincent Beatty, [Room:], GANNETT CTR, 861 BEDFORD ROAD, GN1, PLEASANTVILLE, NY 10570, United States

Search additional  Results Per Page 10 ▼

Delivery Options

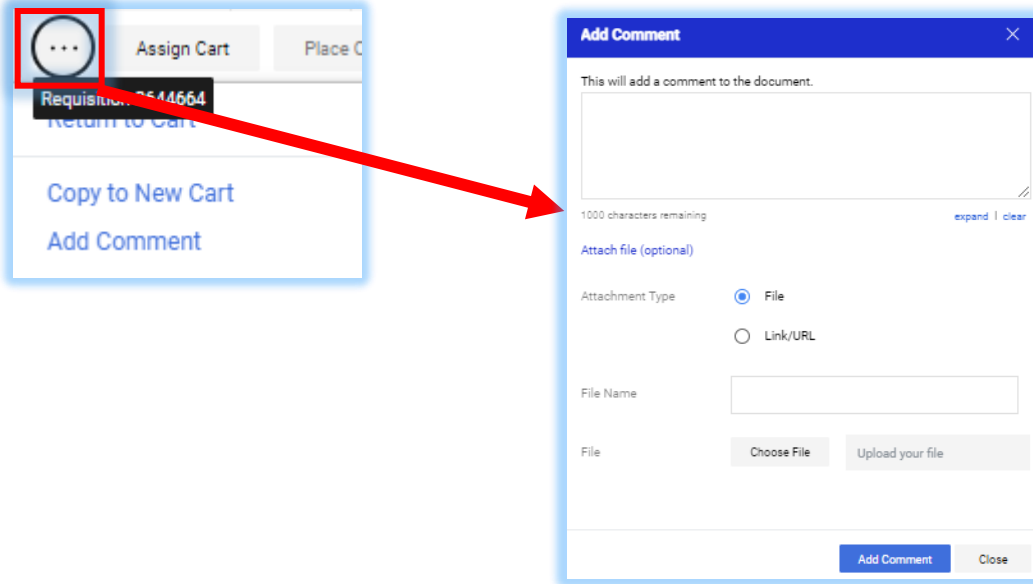
Expedite

Ship Via Best Carrier-Best W. ▼


Delivery Date  mm/dd/yyyy

Save Changes Close

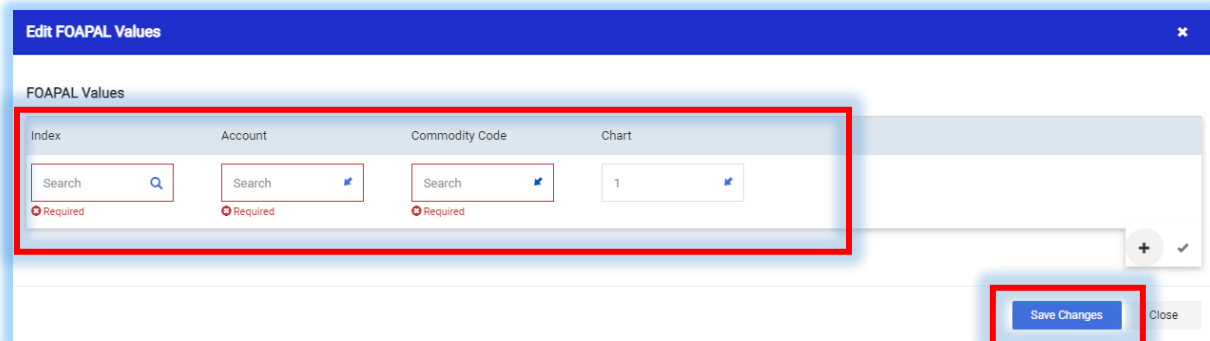
To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the menu (the **...** in the upper right) and select **Add Comment**. Then enter the comment in the pop-up box (the option to attach a document is available). Then click the **Add Comment** button.




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.




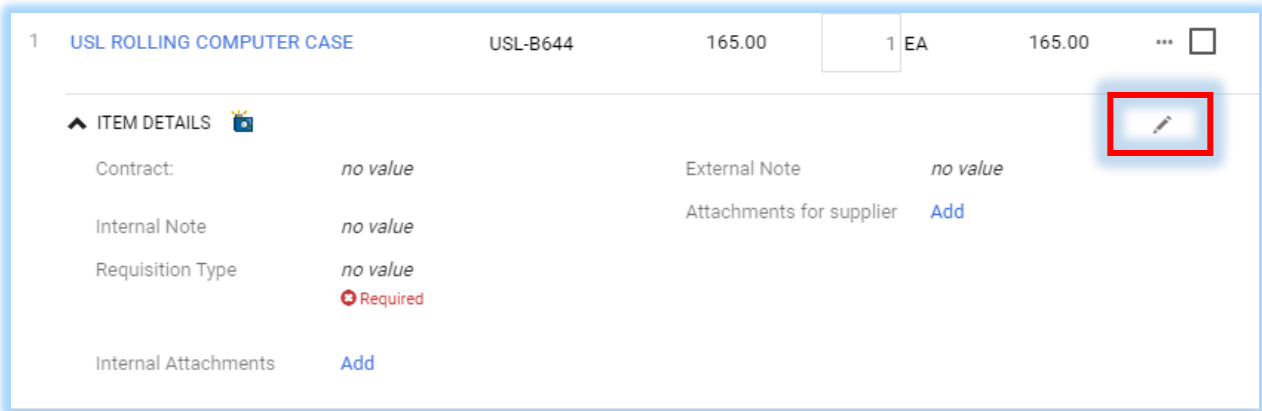
To search for available values, click on the Arrow icon  located towards the right of the field to open a search.


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**.



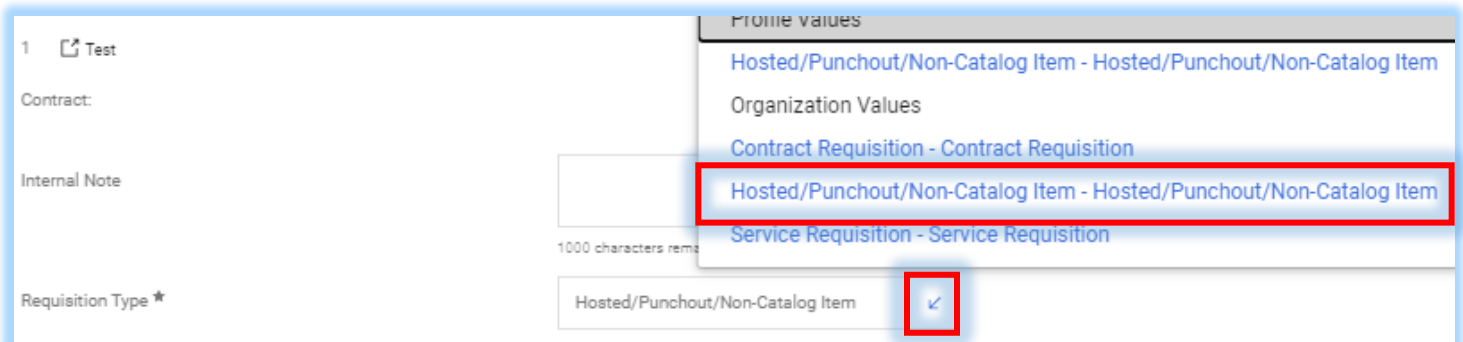
1	USL ROLLING COMPUTER CASE	USL-B644	165.00	1	EA	165.00	...	
---	---------------------------	----------	--------	---	----	--------	-----	---


ITEM DETAILS

Contract:	no value	External Note	no value
Internal Note	no value	Attachments for supplier	Add
Requisition Type	no value Required		
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**.




1  Test

Contract:

Internal Note

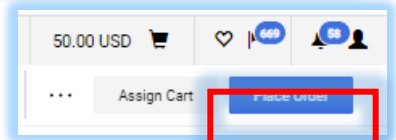
1000 characters remaining





Requisition Type ★

Hosted/Punchout/Non-Catalog Item 

- Profile values
- Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item
- Organization Values
- Contract Requisition - Contract Requisition
- Hosted/Punchout/Non-Catalog Item - Hosted/Punchout/Non-Catalog Item**
- Service Requisition - Service Requisition

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



50.00 USD   669  58 

... Assign Cart **Place Order**

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

Viewing the Requisition Status and Details:

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

Requisition 3644629 Submitted

Summary		Options
Requisition number	3644629	Print
Requisition status	Pending	Recent orders
Cart name	2022-11-04 momara 02	Return to your home page
Requisition date	11/4/2022	
Requisition total	50.00 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:

Requisition • 3644629

Summary PO Preview Comments Attachments History

General	Internal Info	Supplier Info
Cart Name: 2022-11-04 momara 02	Internal Note: no value	Note to all Suppliers: no value
Priority: Normal	Internal Attachments	Accounting Date: no value
Description: no value		Attachments for all suppliers
Prepared by: Meghan O'Mara		
Prepared for: Meghan O'Mara		

Ship To	Bill To
Contact Name ATTN TO: Meghan O'Mara Phone +1 914-923-2684 ext. 22684 Email momara@pace.edu 100 Summit Lake Drive 3rd Floor Valhalla, NY 10595 United States	Pace University Accounts Payable Department PO Box 2500 Briarcliff Manor, NY 10510-0352 United States

Pending

Total (50.00 USD)

Subtotal 50.00

50.00

What's next?

Workflow

Show skipped steps

Submitted 11/4/2022 11:16 AM Meghan O'Mara

Banner Budget Check Completed System

Department Approval Active

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

Requisition · 3644629

Summary PO Preview Comments Attachments History

Start date End date Action User

mm/dd/yyyy mm/dd/yyyy

Requisition Document type

Filter Clear All Filters

Line No	Date/Time ↓	User	Step(s)	Action
	11/4/2022 11:16:46 AM	System	Banner Budget Check	Requisition approved
	11/4/2022 11:16:37 AM	Meghan O'Mara		Requisition submitted
	11/4/2022 11:15:07 AM	Meghan O'Mara		Requisition modified