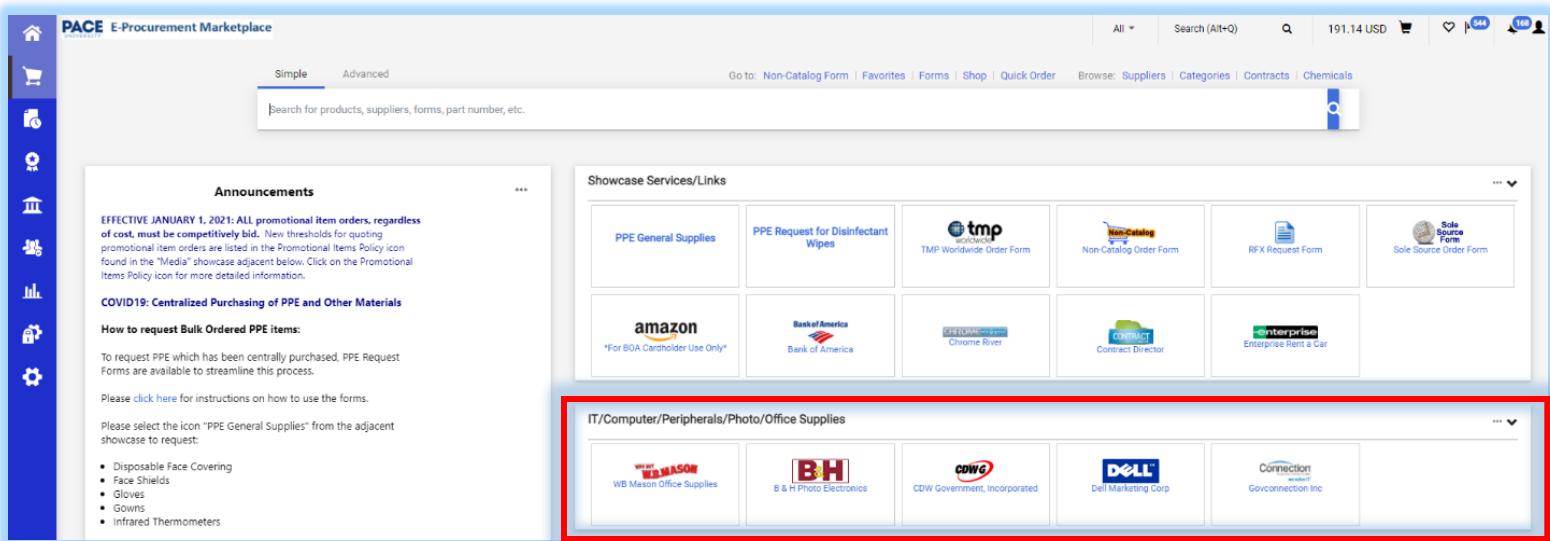


E-Procurement System Tutorial: Creating a Punchout Purchase Order

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

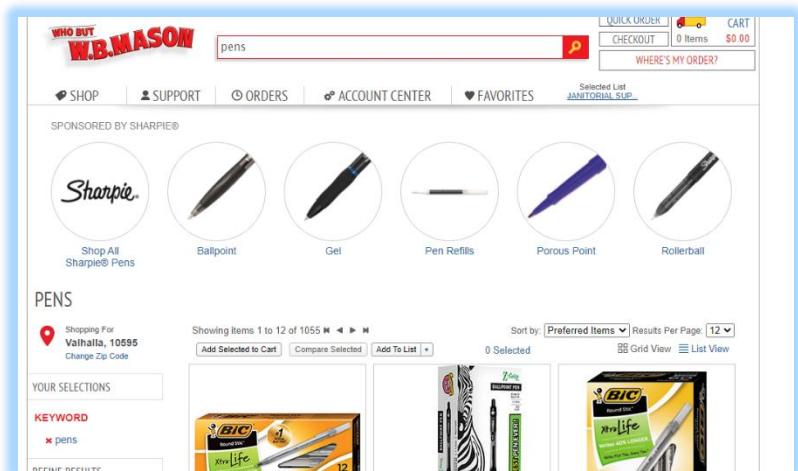
When purchasing from a punch-out vendor, you are sent directly to the vendor's website. From the Home Screen of E-Procurement, click on a Punch-out vendor to start shopping. This will bring you directly to the vendor's site.



The screenshot shows the PACE E-Procurement Marketplace. The top navigation bar includes links for Non-Catalog Form, Favorites, Forms, Shop, Quick Order, and categories like Suppliers, Categories, Contracts, and Chemicals. The main content area features sections for Announcements, Showcase Services/Links, and a prominent IT/Computer/Peripherals/Photo/Office Supplies section. The IT section is highlighted with a red box and contains links to several vendors. The sidebar on the left contains various icons representing different procurement functions.

Navigating the Vendor Website:

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

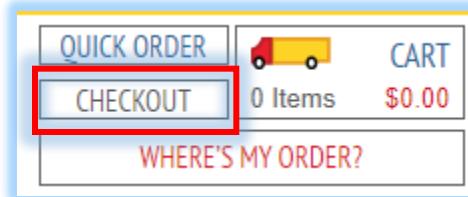


The screenshot shows the W.B. Mason vendor website. The search bar at the top contains the keyword 'pens'. Below the search bar, there are navigation links for SHOP, SUPPORT, ORDERS, ACCOUNT CENTER, and FAVORITES. The main content area displays a grid of pen products, including Ballpoint, Gel, Porous Point, and Rollerball pens. A sidebar on the left provides shopping information for Vallejo, CA 95891 and allows users to refine their search by category. The results are currently sorted by 'Preferred Items'.

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:

Shopping Cart • 3644664

Simple Advanced

Search for products, suppliers, forms, part number, etc.

2 Items

W B Mason Co Inc • 2 Items • 13.61 USD

SUPPLIER DETAILS Bi Billing Address 2: 59 Centre Street, Brock... ▾

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on

- PerfectTouch Hot Cups, Paper, 12 oz, Fits Large Lids, 50/PK
- Profile Ballpoint Retractable Pen, Black Ink, Bold, 1.4 mm, DZ

Item	Catalog No.	Unit Price
1 PerfectTouch Hot Cups, Paper, 12 oz, Fits Large Lids, 50/PK	DXE5342CD	5.62

ITEM DETAILS

Details

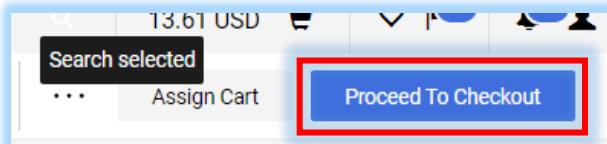
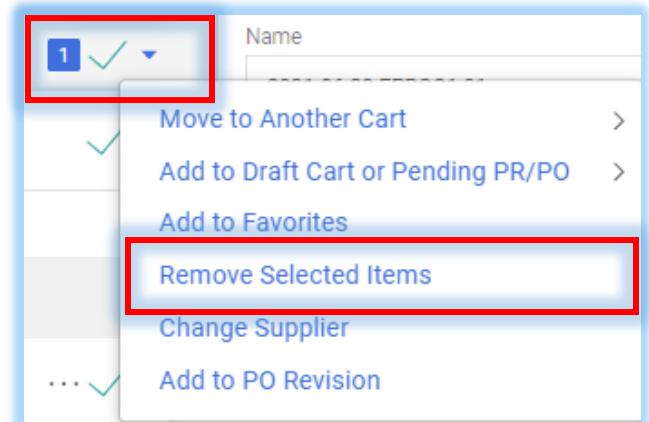
Total (13.61 USD)

Total: 13.61

Assign Cart [Proceed To Checkout](#)

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:

A screenshot of the Requisition screen for Requisition #3644664. The screen is divided into several sections: General, Internal Info, Supplier Info, Ship To, and Draft. A large blue circle highlights the 'View of Order at Final Review step.' area. The General section shows details like Cart Name (2022-11-04 momara 03), Priority (Normal), and Prepared by (Meghan O'Mara). The Internal Info section includes Internal Note (no value) and Internal Attachments (Add). The Supplier Info section shows Note to all Suppliers (no value) and Accounting Date (no value). The Ship To section lists a contact named Meghan O'Mara with address details. The Draft section shows a warning about unaddressed issues, a total amount of 13.61 USD, and a list of approvers: Beatty, Regina; EPROC2, TEST; O'Mara, Meghan; Thompson, Shuana.

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.

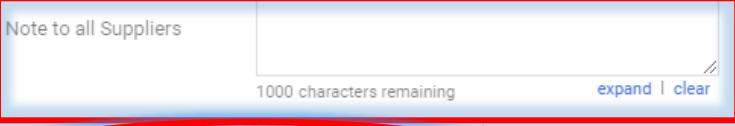
To adjust information, click the **Pencil icon**  within the section you would like to edit. Then click on **Save Changes**.

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, GNT, PLEASANTVILLE, NY 10570, United States

Search additional  Results Per Page 10 **▼**

Delivery Options

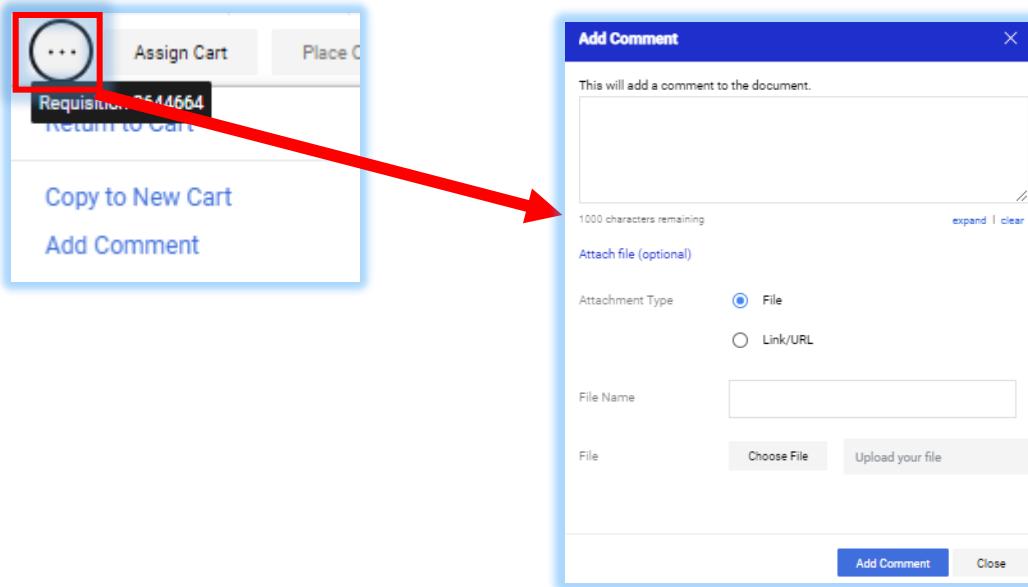
Expedite

Ship Via Best Carrier-Best W 

Delivery Date  mm/dd/yyyy 

Save Changes **Close**

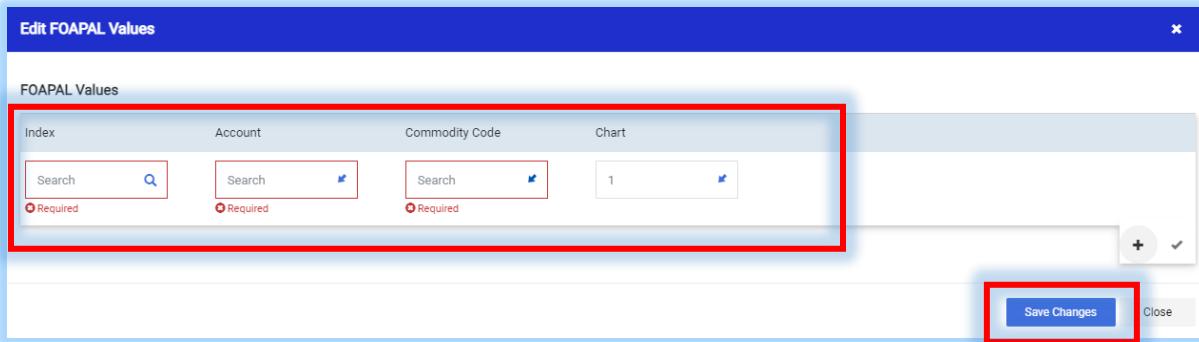
To add **Comments** to the requisition for the Approver and Purchasing Team to see, click on the menu (the  in the upper right) and select **Add Comment**. Then enter the comment in the pop-up box (the option to attach a document is available). Then click the **Add Comment** button.



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.



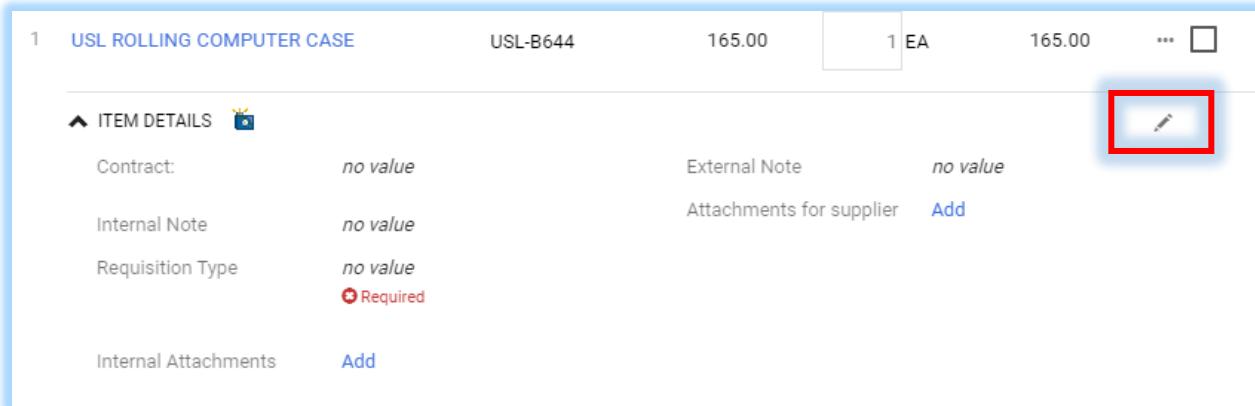
To search for available values, click on the Arrow icon located towards the right of the field to open a search.

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**.



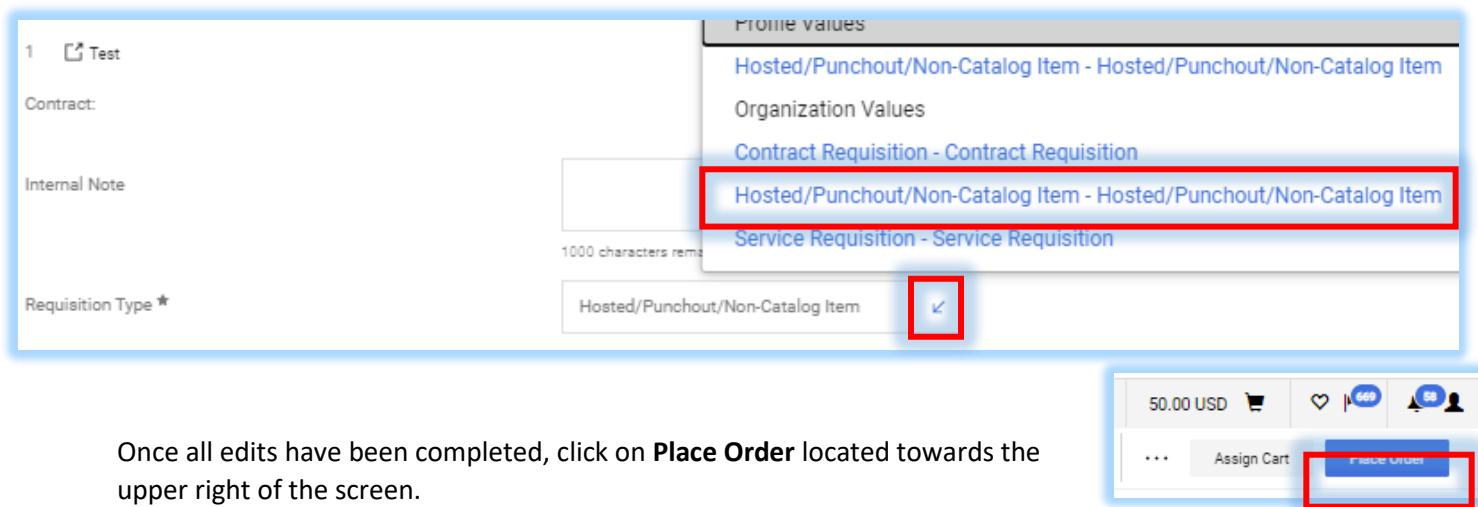
1 USL ROLLING COMPUTER CASE USL-B644 165.00 1 EA 165.00 ...

▲ ITEM DETAILS 

Contract:	<i>no value</i>	External Note	<i>no value</i>
Internal Note	<i>no value</i>	Attachments for supplier	Add
Requisition Type	<i>no value</i> <small>Required</small>		
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**.



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

Hosted/Punchout/Non-Catalog Item

50.00 USD    

... Assign Cart **Place Order**

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

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

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

Bill To

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 · 105.00 USD

▲ SUPPLIER DETAILS 

PO Number
30632005

Pricing/Discount Code
no value

Requisition • 3644629

Summary **PO Preview** **Comments** **Attachments** **History**

Start date End date Action

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