

STORES INVENTORY ORDERING PROCEDURES



Central Warehouse Orders



Transportation Requests



Technology Technology Software Request

MANUAL BUSINESS SOFTWARE HELPDESK



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Step 1: Access Stores/Inventory-Create/Update Orders Screen (SIOEUB)

D BusinessPlus			ଡ ୦ 📧
≡Menu ▼	•ooocooocooo ooocooocooo		BISD 19.12 Future Prod
c	Click: Menu	2 0 v 2 0 v	
	WORKFLOW APPROVAL	€ 0 v	
	REPORTS	2 0 v	





≡Menu			BISD 19.12 Future Prod
≡ SI OE	•000000000 0000000000		
BP Order Set Proof	Use	1	
CR Consolidated Returns	EMPLOY LIB Create/Lindate Orders	2 0 v	
EX Enter Order Exceptions	Select:		
FL Fill Order; Post to SI and GL	JOBS	20 v	
GL Re-post Filled Order to GL		2 Q H	
OS Order Summary Report	WORRELOW AFFROVAL		
PB Print Backorders	REPORTS	2 0 v	
PK Print Pick Tickets			
PR Print Pick Tickets Restricted			
PS Print Packing Slip			
SI Fill Order; Post to SI Only			
LIB_Create/Lindate Orders			

Create/Update Orders (SIOEUB) screen will open.

E E	iusinessPlus Dashboard 🗙 📀 Create/Upda	ate Orders (SIOEUB) × +					- 6 ×
\leftarrow	→ C 🏠 🔒 bp.bisd.us/screens/ui/uiscre	ens/StoresInventory/SIOEUB					ର୍ 🖈 🛊 🗈 :
III A	ops						
D	BusinessPlus		Creat	e/Update Orders (SIOEUB)			Q 😯 EC
=	Search	+					
۹	Apply Search	Order ID*	T Description*		Year.*	T	
	Clear Criteria						
		Status:	it Pri Warehouse:	t Security Code:	۳ Route:	Y	
6	Filters:	Sec Warehouse:	T Price Code:	Y Order Total:	0.00		
Ŭ	NewAndPendingOr	Main Items					
	Search Criteria:	Requested By.*		T Requested Date*	Required Date:	ΠT	
		Approved By:		Approval Date:	Ť		
		Customer ID.*	Ξ Ţ				
		Addr:	T				
		Contact	T End Use:	Customer PO:	T Misc:	т	
		Prep ID.*	Transaction Code*	T Pick Ticket:	Transaction Frmt*	т	
		Purchasing PR:	т				
		Order Codes					
		Order Code 1:	T Order Code 2:	Order Code 3:	T Order Code 4:	т	
		Order Code 5:	T Order Code 6:	Order Code 7:	T Order Code 8:	т	
		Order Code 9:	T Order Code 10:	T			

Step 2: Create the Order

E Bus	inessPlus Dashboard 🗙 🔇 Create/Upda	te Orders (SIOEUB) × +				-	٥	×
$\leftarrow \rightarrow$	C 🗅 bp.bisd.us/screens/ui/uiscree	ens/StoresInventory/SIOEUB				0 ☆	* 6	•
Apps								
Вв	usinessPlus		Create/Update C	orders (SIOEUB)		 <u> </u>	?	EC
	Search Apply Search Clear Criteria NewAndPendingOr earch Criteria:	+ I Order ID* I Statux* See Warehouse: Main Items Requested By* Image: Contact: Contact: Image: Contact: Prep ID* Image: Contact: Purchasing PR: Image: Contact: Order Codes Image: Contact: Order Codes Image: Contact: Order Code S: Image: Contact: Image: Contact: Image: Contact: Image: Contact: Image: Contact: Image: Contact: Image: Co	Y Description* Y PriWarehouse* Y Price Code: Y End Use: Y End Use: Y Transaction Code* Y Order Code 2: Y Order Code 6: Y Order Code 10:	T Security Code: T Order Total: T Requested Date* Addd Image: Conference of the second se	▼ Year* ▼ Rode: 0.00			

A blank screen will display.

₿В	usinessPlu	S		Create/Update Orders (S	SIOEUB)		-	٩	0	EC
= a	≣ ©								Adc	d
(m)	Order ID.*	9	Description*				Year.*	NONE		•
	Status.*	NW	Pri Warehouse.*	CTWH -	Security Code:		Route:			
•	Sec Warehouse:		Price Code:		Order Total:	0.00				
	Main Item	IS								
	Requested By.*	User Name			Requested Date.*	10/08/2020	Required Date:			
-	Approved By:				Approval Date:					
0	Customer ID.*									
C	Addr:	•								
5	Contact:		End Use:		Customer PO:		Misc:			
6	Prep ID.*	BI734ECC	Transaction Code.*	OE 💌	Pick Ticket:		Transaction Frmt.*	NB		•
⊞	Purchasing PR:									
<i>F</i> .	Order Codes									
	Order Code 1:	-	Order Code 2:	•	Order Code 3:	•	Order Code 4:			
	Order Code 5:	•	Order Code 6:		Order Code 7:	•	Order Code 8:			•
	Order Code 9:	•	Order Code 10:	•						

Example #1: Warehouse Order

STORES INVENTORY ORDERING

Step 3: Input Order ID

****NOTE:** There are **three** types of orders; Warehouse order, Technology order and Transportation order. Example #1 demonstrates how to create a Warehouse order. Example #2; a Technology order (see pg.16) and Example #3; a Transportation order (see pg.21).

:≡ ©				A
Order ID.*	• Description*		Year.*	NONE
Status.* NW	SIORDERN STWH	✓ Security Code:	✓ Route:	
Sec Warehouse:	SITECH		00	
Main Items		F.		
Requested By.*		Click: Select: Type of or	der	
Approved By:				
Customer ID*		such as; SIORDERN (warehou	se	
Addr:	•	supplies), SI. IECH (Microsof	π	
Contact	End Use:	licensing) or SI.TRANS	Misc:	
Prep ID* BI734ECC	Transaction Code.* OE	(transportation requests)	Transaction Frmt.*	NB
Purchasing PR:				
Order Codes				
Order Code 1:	Order Code 2:	Order Code 3:	✓ Order Code 4:	
Order Code 5:	✓ Order Code 6:	← Order Code 7:	Order Code 8:	
Order Code 9:	- Order Code 10			

 ⊅ 1	BusinessPlus		Create/Update	Orders (SIOEUB)				<u> </u>	EC
=			Ordor # will	nopulato					Add
	Order ID.* 00027982 Status.* NW	 Pri Warehou 	CTWH	Security Code:		Year.*	NONE		•
8	Sec Warehouse:	✓ Price Code:		Order Total:	0.00				
	Main Items								

Step 4: Add a Description

=	⊞ G				_		A	Add
~	Order ID.*	00027983	9 Description*	Office Supplies		Year.*	NONE	
8	Status*	NW		CTWH 👻	Security Code:	Route:		
	Sec Warehouse:				Order Total: 0.00			
	Main Item	ns						

Step 5: Select a Primary Warehouse

= a	: : 0									Add
	Order ID.*	00027982	Description	*	Office Supplies			Year.*	NONE	-
	Status*	NW	 Pri Wareho 	use.*	стwн	Security Code:	•	Route:		
	Sec Warehouse:		 Price Code 			Q Total:	0.00			
0	Main	5			Code Description					
	ividin item	3			Not Selected					1
Z	Requested By?	User Name			ALL All Warehouses	uested Date:"	Click: Drop Do	wn Arro	w Select: A	
A	Approved By:				MDCT MEDIA CENTER	roval Date:	warehouse deper	nding on	type of order:	
<i>y</i>	Customer ID*				PRNT PRINT SHOP			houso su	inplies) TECH	
	Adde		_		TECH TECHNOLOGY WAREHOUSE		CIWH (IOF ware	nouse su	ipplies, iech	
2	Addi.		•		TRAN TRANSPORTATION WAREHOUS	E -	(for Microsoft PC	C license) or TRAN (for	
C	Contact:		End Use:			Customer PO:	transport	ation red	quests)	
B	Prep ID.*	BI734ECC	Transaction	n Code.*	OE 🔹	Pick Ticket:				•

Step 6: Input Security Code

0	:≡ G							,	Add
	Order ID*	00027983	Description.*	Office Supplies			Year.*	NONE	•
	Status.*	NW	 Pri Warehouse.* 	CTWH	Security Code:		Route:		
	Sec Warehouse:		 Price Code: 		Order Total:	734 (
0	Main Item	ns				Code Description			
	Requested By*	Liese Name			Requested Date*	734 BI-TECH HELP DESK	en muired Date:	N	-
C.	rioquotica DJ.	User Marile				10/05/2020			
2	Approved By:				Approval Date:		Click: Dr	op down arrov	w, I
							input/s	elect location	

Step 7: Input Customer ID



BusinessPlus_{20.11}

STORES INVENTORY ORDERING

Data Lookup screen will populate.

В	usinessPlu	s			Create	/I Indate Orde	are (SIOFLIR)				_		<u> </u>	EC	
	_					Data	Lookup			_	_		_	_	
a	⊞ G							Search ID Source:	All	-				Add	
	Order ID.*	00027983	PEID		Name		Security CD	Pedb Co	ode	Year.*		NONE		*	
	Status.*	NW		\odot		•		\odot		Route:					
0	Sec Warehouse:														
	Main Item	15									15.1				
ď	Requested By."	Erika Cisneros								Require	d Date:				
Ð	Approved By:														
	Customer ID*														
C	Addr:														
5	Contact:								No items to display	Misc:					
8	Prep ID.*	BI734ECC	Code	Address	s Line 1	Address Line 2	Address Line	3 Address Line	e 4 City	Transac	tion Frmt."	NB		*	
⊞	Purchasing PR:														
* •	Order Codes														
	Order Code 1:									Order C	ode 4:			-	
	Order Code 5:								No items to disolav	• Order C	ode 8:			*	
	Order Code 9:		Add						Close						

	Data Lo	ookup		
		Search ID	Source: All	~
PE ID	Name Se	ecurity CD	Pedb Code	
	BI-TECH 💿 🗙	\odot		
5734	BI-TECH HELP DESK		Р	·
				Input: Your location name
				Click: Select: Location
				Olickt
			1 -	of title is
Code	Address Line 1 Address Line 2	Address Line 3 Add	ress Line 4	City
P1	4330 E. Morrison			BROWNS /IL
S1	4330 E. Morrison			BROWNSYIL
<u>.</u>				
Add			Clo	ose Ok

Main Ite Requested By* Approved By: Customer ID*	USer Name	Customer ID information will populate.	
Addr:	P] •		
	4330 E. Morrison Rd. BROWNSVILLE, TX 78521		
Contast	End Use:	Customer PO: Misc:	

Step 8: Enter items needed.

	Status."	NW	Pri Warehouse: CTWH	 Security Code: 	734	Route:	
	Sec Warehouse:	-	Price Code:	Order Total:	0.00		
0	Mair Iter	ns					
	Requested By*	User Name		Requested Date*	06/30/2020	Required Date:	
ß	Approved By:			Approval Date:			
Ø	Customer ID*	C724					
	Subtomer 15.	3/34	Click on Items Tak				
C	Addr:	P1 4330 E. Morrison Pd					
C		BROWNSVILLE, TX 78521					
8	Contact:		End Use:	Customer PO:		Misc:	

Items field will populate and ready for entries.

0	Main Item									
C.	=									Add
Ø	Line Number:	0001	Sequence:	0	Line Status.*	CM		Units:		
	Warehouse:		Quantity Ordered:	0	Product ID.*					
C	+ Add Acco	punt							Total: 100.00%	Remaining: 100.00%
C	Account								Percen	t
6										*
⊞				No Recor	ds Found.					
<i>F</i> +	Price Code:		Quantity Available:	0	Unit Price:		0.00000	Total Price:		0.00000

*Note: For a list of Product IDs; access the SI: Warehouse Catalog SI: Warehouse Catalog located in CDD Reports.

STORES INVENTORY ORDERING

•	Main Items		Enter quantity needed
2	18		Add
P	Line Number: 0001 Sequence:	0 Line Statusti	CM Units:
	Warehouse: Quantity Ordere	t: 10 Product ID.*	
C	+ Add Account		Total: 100.00% Remaining: 100.00%
'D	Account		Percent
Ð		No Records Found	^ ^
		No Records Found.	×
<i>»</i>	Price Code: Quantity Availat	e: 0 Unit Price:	0.00000 Total Price: 0.00000

0	Main Items			
C.	=			Add
P	Line Number: 0001 Sequent	e: 0 Line Status.* CM	Units:	
	Warehouse: Quantity	Ordered: 10 Product ID*		
C	+ Add Account		7	Total: 100.00% Remaining: 100.00%
5	Account			Percent
E)		No Descride Found	/	*
<i>J</i> ² +	Price Code: Quantity	Enter a "Product ID"; if you	0.00000 Total Price:	0.00000
		ID, Click on to search.		

Prod ID Lookup screen will populate.

Desc	Prod ID	Desc Upshifted	Unit	Status	Product Class
	\bigcirc	\odot	•	•	
1 1/2 Blk spiral bin	800368	1 1/2 BLK SPIRAL	BOX	AC	80
1 1/4 Blk spiral bin	800369	1 1/4 BLK SPIRAL	BOX	AC	80
1" Black spiral bin	800305	1" BLACK SPIRAL B	BOX	AC	80
1/2" Black spiral bi	800302	1/2" BLACK SPIRAL	BOX	AC	80
10 mm Black spira	800306	10 MM BLACK SPI	BOX	AC	80
10 mm Clear spira	800307	10 MM CLEAR SPI	BOX	AC	80
11 x 17 - Fireball F	800103	11 X 17 - FIREBALL	CASE	AC	80
11 x 17, Orbit Ora	800102	11 X 17, ORBIT OR	CASE	AC	80
11 X 17-Solar Yello	800104	11 X 17-SOLAR YEL	CASE	AC	80
11X17 28# White	800215	11X17 28# WHITE	BOX	AC	80
I 1 2	3 4 5 6 7	7 8 9 10	► H		1 - 10 of 407 item:

	Prod I Input a desc	cription.	
Desc Prod ID PAPER 🕤 🖈 🔽 🐨	Desc Upshifted Click:		Product Class
DISPENSER, PAPER 304008	DISPENSER, PAPER EA	AC	30
DISPENSER, PAPER 304009	DISPENSER, PAPER EA	AC	30
DUPLICATING PAP 101253	DUPLICATING PAP CASE	AC	10
DUPLICATING PAP 101252	DUPLICATING PAP CASE	AC	10
FINGER PAINT PAP 101301	FINGER PAINT PAP PKG	AC	10
MANUSCRIPT PAP 101402	Select from the list.	AC	10
MANUSCRIPT PAP 101403	MANUSCRIPT PAP REAM	AC	10
PAPER, C-FOLD HA 304011	PAPER, C-FOLD HA CASE	AC	30
PAPER, HAND ROL 304012	PAPER, HAND ROL CASE	AC	30
PAPER, TOILET JU 304013	PAPER, TOILET JU CASE	AC	30
Image:	6 7 8 ▶ ▶	_	61 - 70 of 74 items
	Click	Ch Ch	Close Ok



Main Items	**NOTE: <u>D</u> <u>To be used</u>	O NOT click for account	on + splits C	Add Account				
=								Ad
Line Number: 0001	Sequence:	0	Line Status*	CM		Units:	CASE	
Warehouse: CTWH	Quantity Ordered:	10	Product ID*	101253		DUPLICATING PAPER,8 1/2 X	11	
+ Add Account							Total: 100.00%	Remaining: 0.0
Account							Percent	
GL 🔻 199 53	6399 00	734 Y	99	000	М	WORK ORDER	100.00	Delete
Price Code:	Quantity Available:	5.747	Unit Price:		27.7	0496 Total Price:		277.0



ll a E	Image: Non-State Image: Non-State	Description.*	Office Supplies		reat	Record(s) Accepted Edit 1 of 1 -
8	Status* NW Sec Warehouse:	 Pri Warehouse.* Price Code: 	СТШН	Security Code: 734 Order Total:	• Route:	
0 F	Main Items III < > + III IIII IIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		The followi will d	ng message isplay.		Edit 1 of 1 🔲-

Repeat for additional items needed.

Step 9: Verifying Encumbrance

GL: Available Balance by FQA and Location to verify that

Run CDD Report: Available Balance by FQA and Location money was encumbered.

Step 10: Submit Order for Approval

=	≡ < > + @ 42				Edit 1 of 1 🚍 -
	Order ID:* 00027983	Description* Office Suppli	ies		Year.* NONE -
-	Status.* NW	✓ Pri Warehouse [*] CTWH	 Security Code: 	734 👻	Route:
0	Sec Warehouse:	Click: 🛱 Pend	ling Tasks	27.70	
C	≡ < > + <u>⊕</u> <				Edit 1 of 1 🚍-
Ø	Line Number: 0001	Sequence:	0 Line Status.*	CM	Units: CASE
1	Warehouse: CTWH	Quantity Ordered:	1 Product ID*	101253 🔲 DUPLI	CATING PAPER,8 1/2 X 11
0	+ Add Account				Total: 100.00% Remaining: 0.00%
5	Account				Percent
	GL v 199 53 6	399 00 7	734 Y 99	000 Y	WORK ORDER
<i>p</i> ,	Price Code:	Quantity Available:	5,746 Unit Price:	27.70496	Total Price: 27.70496

Approvals field populates.

=	Approvals	= <	` + @ @	
Q	Direct Task It 🔹	`		D
\$!! !	Direct Task Items Awaiting ID	Order ID:"	00027983	Description."
	Approval	Status*	NW -	Pri Warehouse.*
6	User ID: BI734ECC Role ID: Document: OrderID: 00027983 ~	Sec Warehouse:	Click: Drop down ar	e
Č	Cust:S734~Stat:NW	Main Ite	Direct Task It	
F		Requested Bv*	Direct Task it	
Ø		Approved By:		
Ċ		Customer ID.*	5734	
a		Addr:	Р1 🔻	
~			4330 E. Morrison Rd.	
Ċ		Contact	BROWNSVILLE, 1X 78521	End Llos
B		Contact.		LIIU USE.
▦		Prep ID:*	BI734ECC	Transaction Code.*
E.		Purchasing PR:		
¢ ,		Order Codes		

=	Approvals	= /	` + = <i>P</i> ₀	
Q	Direct Task It 🔹	Order ID*		Departmention*
	Direct Task Items Awaiting ID Approval		00027983	Mit
	Order Header	Status?	NW -	Pri Warehouse."
0	Role ID: Document: OrderID:TE000914~	Sec Warehouse:	•	Price Code:
F	Cust.5734~Stat.NVV	Main Iter	ms	
C		Requested B	Select:	1
P		Approved By	Order Header	
<i>و</i> ر		Customer ID.	5/34	BI-TI
		Addr:	P1 🔹	
8			4330 E. Morrison Rd.	
5		Contact:	BROWNSVILLE, IX 78521	End Use:
		Prep ID*	BITRAFCC	Transaction Code*
⊞		Durchasian DD	ылацие	
		Purchasing PR:		
=	Approvals	:= <	> + 俞 御	
Q	Order Header 🔹	Order ID.*	00027983	Description.*
¥!!"	Pending	Status*		Pri Warehouse*
	BI734ECC Group: Since: 10/07/20 15:47:49	0		
0	On: 12/31/50 00:00:00	Sec Warehouse:	Click Approve to	o submit
F	O Future Group: WF Dept 734	Main Ite	through the Wo	orkflow.
C	Future Group: WF PA HW/SW 1	Requested By*		
Ø	O Future	Approved By		
	HW/SW 2	Customer ID.*	5734	BI-
0	C Link to Task List	Addr:	P1 •	
Ċ	 Approve 		4330 E. Morrison Rd. BROWNSVILLE, TX 78521	
B	× Reject	Contact:		End Use:
	🕲 Hold	Prep ID.*	BI734ECC	Transaction Code.*
	Forward	Purchasing PR:		
and a		Order Codes		

Comments box will populate; available for any comments for the approvers.

*Note: <u>DO NOT</u> use special characters; such as: #, &, \$, @, *, %, etc...

Þ	BusinessPlus			Create/Lindate Orders (SIC	ELIB)	×		٩	0	EC
Q	Approvals Order Header Pending BI734E0C Group: Since: 1007/20 15:47:49 On: 12/31/50 00:00:00 Puture Group:WF Dept 734 On Eluture	Image: Content ID* TEOC Order ID* TEOC Status* NW Sec Warehouse: Items Main Items Requested By* Frick	Items needed for office us	el Click: Submit	Cancel Biguested Date* 06/30/000	Submit Required Date	Edit 1 of 11			
			I							

= a	Approvals Direct Task It 🔻	Image:	scription* MICROSOFT OFFICE LICENSE	Year NONE
-	♥ Pending BI734ECC Group: Since: 10/07/20 15:47:49 On: 12/31/50 00:000	Status* NW • Pri	Warehouse!* TECH	Route:
	O Future Group: WF Dept 734	Main Items	Successful message Popup appears.	

BusinessPlus 20.11

STORES INVENTORY ORDERING



D	BusinessPlus _{20.11}			STORES INVENTORY C	ORDERING
=	Approvals	:= <	> + @ 谷		
Q	Order Header 🛛 🔻	Order ID.*	00027983	Description.*	
	✓ Accepted	Status.*	NW	✓ Pri Warehouse*	
	Group: On: 10/09/20 08:51:05	Sec Warehouse:		Price Code:	
•	use.	Main Iter	ms	Notice: Next approver in	
.	BI734WRI Group: WF Dept 734 Since: 10/09/20 08:52:03	Requested By*	User Name	line is now – Pending. And your comment is displayed	
Ø	② Future	Approved By:		on the Note field.	
(C)	Group: WF PA HW/SW 1	Customer ID*	\$734		
a	O Future Group: WF PA	Addr:	Pl	•	
5	HW/OW 2		4330 E. Morrison Rd. BROWNSVILLE, TX 78521		
		Contact:		End Use:	
		Prep ID.*	BI734ECC	Transaction Code.*	
		Purchasing PR:			
		Order Codes		•	

Originator will receive an email upon final approval.

Step 11: Print your Order

Go to CDD Archive			
CDD Folders			
🗅 7.9 Standard Reports			_
🗅 Bi-Tech		🗅 GL_FIN	
🗅 Development	Click:		
🗅 Federal Programs			
C Food Services			
D Food Services HR Reports			
□ HR_PY			
🗅 IFAS IQ Reports			
REPORTS			
REPORTS Go to CDD Archive			
REPORTS Go to CDD Archive CDD Folders > GL_FIN			
REPORTS Go to CDD Archive CDD Folders > GL_FIN			
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting			
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting Occasional Use	Click:	🗅 Warehou	ıse
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting Occasional Use Person Entity	Click:	🗅 Warehou	ıse
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting Occasional Use Person Entity Purchasing	Click:	🗅 Warehou	ıse
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting Occasional Use Person Entity Purchasing Purchasing End-User	Click:	ဲ Warehou	ıse
REPORTS Go to CDD Archive CDD Folders > GL_FIN GL Govt Reporting Occasional Use Person Entity Purchasing Purchasing End-User Warehouse	Click:	ဲ Warehou	ıse

REPORTS

Go to CDD Archive	
CDD Folders > GL_FIN > Warehouse	
🖹 GL: Expenditure Detail L03 by Fund, Fund Year, Loc, Func, Obj	Click:
🖹 GL: Expenditure Summary Page Break by Fund	🖹 SI: Warehouse Order Status 102013
🖹 PO: Open Purchase Order Report	
PO: POPR Summary Listing	
🖹 PO: Purchase Order Aging Report	
🖹 PO: Purchase Order Status	
🖹 SI: Warehouse Catalog	
SI: Expendiutes by Product ID Funding Source 022014	
∃ SI: Warehouse Order Status 102013	



The following popup message bars will appear.

BusinessPlus	SI: Wa	arehouse Order Status 102013	9 9 EC
	Selection Criteria Prompt1 Enter the value for 'SI_ORDER_PE_ID': example: S874	*	Generating report Report submitted Job# 4013891
	Enter the value for 'SI_ORDER_ID': ex: 00016803	00027983	
		C2	ncel

See example below; for printing/downloading options, click the Adobe icon.

D Bus	sinessP	lus		SI: Warehouse Order			
® 1400)							
			Brownsvil Warehou	lle Independent School District se / Textbooks / Fixed Assets Order Summary			
Customer ID:	\$734				Order No:	00027983	
	BI-TECH H	ELP DESF	ζ.		Status:	NW	
	4330 E. Mor	rison Rd.	70504				
	BROWNSV	ILLE, TX	78521				
Deliver To:	Office Suppl	ies					
Requested By:	User Name				Requested Date:	06/30/2020	
Approved By:					Approved Date:		
Item #	Qty	Units	Stock #	Stock Description	Unit Cost	Total Cost	
0001	1.00	CASE	101253	DUPLICATING PAPER,8 1/2 X 11	27.70	27.70	
				Total: \$		27.70	

Charged to: IA

Step 12: Track your Order

*Access SendSuite Live through Warehouse Website. You may contact Warehouse Dpt. for User Login information.

SendSuite[®] Live

	Login
Username: Password:	Log In

pitney bowes

Example #2: Technology Order

**Note: For Microsoft Office 365 Licenses ONLY!

D	BusinessPlus		Create/Update	Orders (SIOEUB)		Q ? EC
=	Search	(+)				
-	Apply Search	Order ID*	T Description.*		Y Year.*	T
4	Clear Criteria	Status.*	T Pri Warehouse*	T Security Code:	T Route:	T
0	Filters:	Sec Warehouse:		Vrder Total:	0.00	
	Search Criteria:	Main Items Requested By.* User Nam	e Click:	T Requested Date*	Required Date:	T III
		Approved By:		Approval Date:	1 T	
		Customer ID.*	T			
		Addr:	Ŧ			
		Contact:	T End Use:	Customer PO:	Misc:	T
		Prep ID.*	Transaction Code.*	Pick Ticket:	Transaction Frmt*	τ
		Purchasing PR:	T			
		Order Codes				
		Order Code 1:	T Order Code 2:	T Order Code 3:	T Order Code 4:	T
		Order Code 5:	V Order Code 6:	Vorder Code 7:	Order Code 8:	т
		Order Code 9:	T Order Code 10:	T		

= a	≣ 0			Add
	Order ID.*	Pescription.*		Year.* NONE -
	Status.*	NW SIORDERN STANH	Security Code:	Route:
2	Sec Warehouse:	SI.TECH	0.00	
0		JUINANS		
	Main Items		. 4	
C.A.	Requested By.*	User Name Clic	:K: == == == == == == == == == == ==	Required Date:
	Approved By:		SI.TECH	
Ø	Customer ID*	Sel	ect:	
	outomor ib.			
C	Addr:			
5	Contact:	End Use:	Customer PO:	Misc:
5	Prep ID.*	BI734ECC Transaction Code.* OE -	Pick Ticket:	Transaction Frmt.* NB -
	Rurahasing PP:			
⊞	Purchasing PR.			
<i>p</i> +	Order Codes			
	Order Code 1:	▼ Order Code 2: ▼	Order Code 3:	Order Code 4:
	Order Code 5:	▼ Order Code 6: ▼	Order Code 7:	Order Code 8:

Note: "Primary Warehouse" defaults automatically to "TECH".

9	:= O									Add
	Order ID*	TE000914	4 Des	scription.*				Year.*	NONE	•
-	Status*	NW	Pri	Warehouse.* T	TECH	 Security Code: 	•	Route:		
0	Sec Warehouse: Main Item	ns	✓ Price	ce Code:		Order Total:	Enter: a descr	iption		

= G									Add
Order ID.*	TE000914	9 Description*	MICROSOFT OFFICE LICENSE				Year.*	NONE	
Status.*	NW	✓ Pri Warehouse*	TECH	 Security Code: 			Route:		
c Warehouse:		 Price Code: 		Order Total:	734	Q			
Main					Code Description				
Main	15				734 BI-TECH HELP DESK				
equested By*	User Name			Requested Date*	10/07/2020		Required Date:		Ē.
Approved By:	_			Approval Date:					
	Click:	Dron dow	n arrow.						
			in an only						
	input/s	elect loca	tion.						

	Main Iter	ns					
C	Requested By.*	User Name		Requested Date*	10/07/2020	Required Date:	
n	Approved By:			Approval Date:			
Ċ,	Customer ID*	5734	BI-TECH HELP DESK				
2	Addr:	P1 •					
C		4330 E. Morrison Rd. BROWNSVILLE, TX 78521		Entor: Cust	omor ID (lottor	Sinduc	
	Contact:		End Use:	3 digit loca	tion#) (ex: S734	s pius l)	

0	Approved By:				Approval Date:				
<i>ور</i>	Customer ID*	5734		BI-TECH HELP DESK					
•	Addr:	P1 -							
ອ ວ		4330 E. Morrison Rd. BROWNSVILLE, TX 78521							
E	Contact:		End Use:	(Customer PO:	P11111	Misc:		
	Prep ID.*	BI734ECC	Transaction Code.*	OE	Pick Ticket:		Transaction Frmt.*	NB	•
E .	Purchasing PR:								
~	Order Codes	Enter: Purchas	e Orde	r#					
		(ex: P111)	111)						

BusinessPlus_{20.11}

STORES INVENTORY ORDERING



STORES INVENTORY ORDERING

Data Lookup screen will populate.

Prod ID Lookup								
Desc	Prod ID	Desc Upshifted	Unit	Status	Product Class			
1 1/2 Blk spiral bin	800368	1 1/2 BLK SPIRAL	вох	AC	80			
1 1/4 Blk spiral bin	800369	1 1/4 BLK SPIRAL	BOX	AC	80			
1" Black spiral bin	800305	1" BLACK SPIRAL B	BOX	AC	80			
1/2" Black spiral bi	800302	1/2" BLACK SPIRAL	BOX	AC	80			
10 mm Black spira	800306	10 MM BLACK SPI	BOX	AC	80			
10 mm Clear spira	800307	10 MM CLEAR SPI	BOX	AC	80			
11 x 17 - Fireball F	800103	11 X 17 - FIREBALL	CASE	AC	80			
11 x 17, Orbit Ora	800102	11 X 17, ORBIT OR	CASE	AC	80			
11 X 17-Solar Yello	800104	11 X 17-SOLAR YEL	CASE	AC	80			
11X17 28# White	800215	11X17 28# WHITE	BOX	AC	80			
I 1 2	3 4 5 6 7	8 9 10	► H	1 -	10 of 407 items			
				CI	ose Ok			



2	Busi	nessPlus	\$20.11			STORES	INVENT		RDERING
C ²	:=								Add
0	Line Number:	0001	Sequence:		0 Line Status.*	СМ	Units:	EA	
er pag	Warehouse:	TECH	Quantity Orde	red:	1 Product ID.*	TE365	OFFICE 365 LICENSE		
	+ Add Ad	count						Total: 100.00%	Remaining: 100.00%
5	Account							Percent	
Ē			Click: + Add Account		No Records Found.				Î
8	Warehouse:	TECH	Quantity Orde	red:	1 Product ID*	TE365	OFFICE 365 LICENSE	Total: 100.00%	Remaining: 0.00%
c	Account							Percent	iteritaring. eleeve
B	Account							Fercent	
⊞	GL • 1	99 53	6395	65 734	Y 99	021 Y	WORK OR	DER 100.00	Delete
8+	Arice Code:		Quantity Avai	able:	P6.024 Unit Price:		55.00000 Total Price:		55.00000
				Input a va Hit:	lid account#. Enter]			

=	:= <	> + @ @									Record(s) Accepted Edit 1 of	1 🗇-
	Order ID*	TE000914	D	lescription*	MICROSOFT OFFICE LICE	NSE				Year.*	NONE	•
	Status.*	NW	• P	ri Warehouse.*	TECH		Security Code:	734		Route:		
0	Sec Warehouse: Price		rice Code:	ode Order Tatal		0.00						
	Main Par			Tł	e follow will be c	ing mes lisplaye	sage d.					

Next, you will need to add the Purchase Order as an attachment.

=						
Q	∷≣ <	> +	前的			
	Order ID.*	TE000914	TE000914			MICROS
	Status.*	NW	NW 🔊 🗸			TECH
			Click on:			
0	Sec Warehouse:				Price Code:	
	Main Iten	15				
ď	* *	> +	ش ^و			
	Line Number:	0001			Sequence:	
	Warehouse:	TECH			Quantity Ordered:	
Q	+ Add Acc	ount				
Ċ	Account					
	Account					
⊞	GL 🔹 199)	53	6395	65	
<i>»</i>	Price Code:				Quantity Available:	

=	Attachments	≔ < > + @ @
Q	Order Header 🔹	Order ID.* TE000914 Desc
ŠII.	Add New Attachment	Status.* NW - Pri W
	Search (ex: pdf) Q	Sec Watebouse:
0		Main It Click on:
		Add New Attachment
C		Line Number: 0001 Sequ
Ø pag		Warehouse: TECH Quar
0		+ Add Account
Ċ		Account
		GL v 199 53 6395
⊞		
<i>»</i>		Price Code: Quar

Ad	d New Attached Item	
PO111111-Desk Top Computer	Input a title/name. Click: Browse Click: Sl attachment - Order Header	2
		Close Attach

STORES INVENTORY ORDERING

Open					×
← → ~ ↑ 🖺 > Tł	is PC > Documents		✓ ♂ Search Do	ocuments	Ą
Organize 🔻 New fold	er				. ?
Prsnl	Name Name DCT2012A.pdf DFFICE DEPOT.pdf Open Purchase Order Rpt.pdf	Date modifie Select the file 6/20/2013 1/4 (Will display in " 3/8/2017 2:23 Click: Open 3/22 2017 2:5 1	e. 'File name" field)		^
This PC 3D Objects Desktop Documents Downloads	 Original Used.xlsx P277465.pdf PatMartinez055.docx Pay Assignment.docx PEIMS_DEMO_ERR_LST.docx PO Modification_2018.pdf 	7/30/2014 10:29 Att Microsoft Excel V 9/26/2016 2:59 PM Adobe Acrobat D 4/13/2015 4:53 PM Microsoft Word D 3/22/2016 955 AM Microsoft Word D 1/23/2017 3:34 PM Microsoft Word D 8/2/2018 1:18 PM Adobe Acrobat D	V 609 KB 3 KB D 750 KB D 3,573 KB D 576 KB D 31 KB		
Music Pictures	PO111111_Desktop Computer.pdf	9/1/2016 9:44 AM Adobe Acrobat D 7/1/2016 5:23 PM Microsoft Word I	3 KB		
Videos Local Disk (C:)	Poupredocx PR received.docx PR Screens.docx PR Issues.docx	//13/2014 4:39 PM Microsoft Word I 1/13/2014 4:39 PM Microsoft Word I 1/15/2014 4:52 PM Microsoft Word I 3/28/2013 3:08 PM Microsoft Word I 8/18/2015 11:22 AM Microsoft Word I	0 983 KB 0 329 KB 0 1,867 KB 0 7,576 KB		
💣 Network 🗸 🗸	1 PR294858.pdf	7/23/2015 3:08 PM Adobe Acrobat D	4 КВ		~
File n	ame: PO111111_Desktop Computer.pdf		→ All Files (Ope	*.*) n Ca	∼ ancel

Add New Attached Item								
PO111111-Desk Top Computer	Click: Attach							
Browse PO111111_Desktop Computer.pd								
	Close Attach							



D	BusinessPlus		Create/Update Orders (SIOEUR)	Q 10 EC
TU			Add New Attached Item	
=	Attachments	:= < >		Ed File attached successfully
Q	Order Header 👻	Order ID.* TEOO	Description	NONE
	🖻 PO111111-Desk T 💼	Status*	6	
			Browse Choose Document	
0	Add New Attachment	Sec Warehouse:	SI attachment - Order Header 🗸 🗸	
	Search (ex: pdf) Q	Main Items		
C		:≡ < >	Close Attach	Edit 1 of 1 💼-
Ð	4. H	Line Number. 0001	Click: Close Une Status" CM Units	EA

You may now proceed to the Workflow approval process. For detailed instructions please refer to Step 10, page 13.

D	BusinessPlus		Create/Update (Orders (SIOEUB)		Q ? EC
= Q 0 0	Search Apply Search Clear Criteria Filters: NewAndPendingOr	+ Order ID* Status* Sec Warehouse:	Pri Warehouse*	Security Code: Order Total:	V Year? V Route:	T
	Search Criteria:	Requested By.*	T End Use:	Requested Date* Approval Date: Customer PO:	Required Date:	т Т
		Prep ID* Purchasing PR: Order Codes Order Code 1: Order Code 5: Order Code 9:	Transaction Code* T T Order Code 2: T Order Code 6: T Order Code 10:	 Pick Ticket: Order Code 3: Order Code 7: T 	Transaction Frmt* Torder Code 4: Order Code 8:	т Т Т

Example #3: Transportation Order

=	≣ ©			Add
4	Order ID.*	Description.*	Year.*	NONE
	Status.*	NW SIORDERN CTWH Security Code:	Route:	
0	Sec Warehouse:	SI.TECH SI.TRANS		
	Main Item	Click:		
2	Requested By.*	Erika Cisneros SI.TRANS	Required Date:	
A	Approved By:			
	Customer ID.*			
c	Addr:	v		
5	Contact:	End Use: Customer PO:	Misc:	
	Prep ID.*	BI734ECC Transaction Code.* OE Pick Ticket:	Transaction Frmt.*	NB
=	Purchasing PR:			
<i>F</i> +	Order Codes			
·	Order Code 1:	 ✓ Order Code 2: ✓ Order Code 3: 	Order Code 4:	•
	Order Code 5:	 ✓ Order Code 6: ✓ Order Code 7: 	Order Code 8:	

:= G				Add
Order ID.* TR005811	Description.* VARSITY FOOT	BALL GAMES 2020-21	Year.* NO	NE
Status.* NW	Pri Warehouse* TRAN	Security Code:	- Route:	
Sec Warehouse:	 Price Code: 	Order Total:		
Main Items		Ente	er: a description	

Note: "Primary Warehouse" defaults automatically to "TRAN".

≡ 0									Add	
Order ID.*	TR005811	4	Description*	VARSITY FOOTBALL GAMES 2020	0-21			Year.*	NONE	
Status.*	NW	•	Pri Warehouse.*	TRAN	 Security Code: 		· •	Route:		
Sec Warehouse:		•	Price Code:		Order Total:	734	٩			
Main						Code Description				
Main Iten	15					734 BI-TECH HELP I	DESK			
Reques	_				Requested Date.*	10/07/2020		Required Date:]
Approvi C	lick: Dro input/selo	op do ect lo	own arı ocation	row,	Approval Date:		m			

STORES INVENTORY ORDERING

					(***)		
			Approval Date:				
5734	BI	TECH HELP DESK					
PI	•	<u> </u>				L	
4330 F. Morrison Rd		Enton	Customer II		mlune		
	5734 P1	5734 E BI	5734 BI-TECH HELP DESK	Approval Date:	S734 BI-TECH HELP DESK	Approval Date:	Approval Date:

ea	Customer ID.*	\$734		BI-TECH HELP DESK				
a	Addr:	P1 •						
5		4330 E. Morrison Rd. BROWNSVILLE, TX 78521						
	Contact:		End Use:		Customer PO:	29165	Misc:	
	Prep ID Purchas Enter: Student Travel # from			m your	Pick Ticket.		Transaction Frmt.*	NB
	Order N	VebTravel Request. (B	EX: 2	9165)				





BusinessPlus_{20.11}

Product ID Lookup screen will populate.

Prod ID Lookup											
Desc	Prod ID	Desc Upshifted	Unit	Status	Product Class						
1 1/2 Blk spiral bin	800368	1/2 BLK SPIRAL	вох	AC	80						
1 1/4 Blk spiral bin	800369	1 1/4 BLK SPIRAL	вох	AC	80						
1" Black spiral bin	800305	1" BLACK SPIRAL B	BOX	AC	80						
1/2" Black spiral bi	800302	1/2" BLACK SPIRAL	вох								
10 mm Black spira	800306	10 MM BLACK SPI	вох	Input: IR							
10 mm Clear spira	800307	10 MM CLEAR SPI	вох	Click:							
11 x 17 - Fireball F	800103	11 X 17 - FIREBALL	CASE								
11 x 17, Orbit Ora	800102	11 X 17, ORBIT OR	CASE	AC	80						
11 X 17-Solar Yello	800104	11 X 17-SOLAR YEL	CASE	AC	80						
11X17 28# White	800215	11X17 28# WHITE	BOX	AC	80						
I ▲ 1 2	3 4 5 6 7	8 9 10	► M	1	- 10 of 407 items						
					:lose Ok						

		Prod ID L	ookup			
Desc	Prod ID TR 😨 🗙	Desc Upshifted	Unit	Status	Product Class	
FIELD TRIPS WITHI	TR150	FIELD TRIPS WITHI	EA	AC	TRTRIP	
ROUND TRIP TO C	TRCORPUS	ROUND TRIP TO C	EA	AC	TRTRIP	
ROUND TRIP TO L	TRLAREDO	ROUND TRIP TO L	EA	AC	TRTRIP	
ROUND TRIP TO S	TRSANANTONIO	ROUND TRIP TO S	EA	AC	TRTRIP	
SUMMER BRIDGE	TR225	SUMMER BRIDGE	EA	AC		
TRIPS WITHIN CA	TR250	TRIPS WITHIN CA	EA	AC	TR Options disp	layec
TRIPS WITHIN HID	TR400	TRIPS WITHIN HID	EA	AC	TRTRIP	
TRIPS WITHIN STA	TR700	TRIPS WITHIN STA	EA	AC	TRTRIP	
TRIPS WITHIN WIL	TR300	TRIPS WITHIN WIL	EA	AC	TRTRIP	
TUTORIALS	TR200	TUTORIALS	EA	AC	TRTRIP	
I 2	► ►				1 - 10 of 11 items	
					Close Ok	

	Prod ID Lookup										
Desc	Prod ID	Desc Upshifted	Unit	Statu	IS	Product C	lass				
•		•		•	\odot		◙				
FIELD TRIPS WITHI	TR150	FIELD TRIPS WITHI	EA	AC		TRTRIP	*				
ROUND TRIP TO C	TRCORPUS	ROUND TRIP TO C	EA	AC		TRTRIP					
ROUND TRIP TO L	TRLAREDO	ROUND TRIP TO L	EA	AC		TRTRIP					
ROUND TRIP TO S	TRSANANTONIO	ROUND TRIP TO S	EA	AC	Solact	Trip Ty	no				
SUMMER BRIDGE	TR225	SUMMER BRIDGE	EA	AC	Select.		he				
TRIPS WITHIN CA	TR250	TRIPS WITHIN CA	EA	AC	Click:	OK					
TRIPS WITHIN HID	TR400	TRIPS WITHIN HID	EA	AC		TRTRIP					
TRIPS WITHIN STA	TR700	TRIPS WITHIN STA	EA	AC		TRTRIP					
TRIPS WITHIN WIL	TR300	TRIPS WITHIN WIL	EA	AC		TRTRIP					
TUTORIALS	TR200	TUTORIALS	EA	AC		TRTRIP					
 III ▲ 1 2 	► ►					1 - 10 of 11 it	• ems				
						Close	Dk				

=	ii o										Add
C	Order ID*	TR005812	4	Description.*	VARSITY FOOTBALL GAMES 2020-21				Year.*	NONE	•
-	Status*	NW	•	Pri Warehouse*	TRAN	✓ Security Code:	734	Ŧ	Route:		
	Sec Warehouse:		•	Price Code:		Order Total:		0.00			
	Main Iter	ns									
C	:=										Add
P	Line Number:	0001		Sequence:		0 Line Status.*	EW		Uniter	EA	
	Warehouse:	TRAN		Quantity Ordered:		5 Product ID*	TRSANANTONIO	ROUND TR	IP TO SAN ANTONIO	>	
0	+ Add Acc	ount								Total: 100.00%	Remaining: 0.00%

Note: Verify the trip location for the Product ID you selected.

BusinessPlus_{20.11}

STORES INVENTORY ORDERING

0	+ Add Account Total: 100.00% Remaining: 100.00%
5	Account Percent
	No Records Found.
<i>»</i>	Click: 9,998 Unit Price: 2,310.00000 Total Price: 11,550.00000
	+ Add Account
Ø	+ Add Account Total: 100.00% Remaining: 0.00%
	Account Percent
ະ ເ	GL 164 11 6494 FT 001 Y 22 000 Y 100.00 Delete
B	Price Code: Quantity Available: 9,998 Unit Price: 2,310,00000 Total Price: 11,550,00000
•	Input a valid account#. Hit: Enter

=	∷ <	> + @ @				_	Record(s) Accepted Edit 1 of 1	-
~	Order ID.*	TR005812	Description*	VARSTY FOOTBALL GAMES 2020-21		Year.*	NONE	•
-	Status.*	NW	Pri Warehouse*	Security Code: 22		Route:		
	Sec Warehouse:	-	Price Code:	The following message	0.00			
0	Main Prome			will be displayed.				

You may now proceed to the Workflow approval process. For detailed instructions please refer to Step 10, page 13.



Notes: