

Cheat Sheet for PO Requisitions in Business Plus

Open POUPPR file:

For new Purchase Req – Click on + above PR Number box

Then click on lightning bolt next to PR Number box, it will show PR Seed; click that and it will assign a PR Number

Security Code box – Enter your
department/school ID

Requested By and Date boxes auto fill

Vendor ID box - Click small box to open

Search vendor by name, press enter

Click on correct choice and click on OK

Details Section:

Buyer box – Click small box to open, enter CO's last name, hit enter, then click on choice and OK. You can also enter your CO number

PO Type box – If buying items and not services use P for purchase order (PS Quantity) but if PO is by amount it will be B Blanket PO. Most Capital Program PO's will be B; amount with paying payments against the total amount – please ask your CO if you are unsure

Requisition Codes Section: Not used at this time

Dates Section: Auto fill

Blanket Section:

Blanket Amount box - enter total dollar amount of PR

Ship To box – Click small box to open

Search for location, hit enter, select choice and OK

Bill To box – defaults to Procurement. Leave as is.

Other Information Section:**Items/Notes Tabs**

Click on Items Tab

Item Number box starts 0001 for line 1; Quantity box - enter 1

Units box - choose each, Unit Price box - enter line 1 total

Item Description box - enter description of what is being ordered and the fund string for that line

Click on Notes Tab

PR Notes is for internal notes

Print Before will be shown above what you typed in item description

Print After will show on PO after item description. We will use this to enter quote numbers, PM name POC name, phone and email etc.

Click back on Items Tab

Account Section:

Add fund string – budget will always be 0

Click enter; if there are any errors, you will see them in upper right corner

Enter additional lines:

Click on Items Tab in the Other Information Section

Item Number box now says 0002 for line 2; Quantity Box - enter 1

Units box - enter Each; Unit Price box - enter amount of that line

Enter item description – if fund string is different change now; if not, leave alone and hit enter.

Auto changes to Line 3 – repeat above steps

Upload quotes or back up documents:

Under the P logo in the top left corner of your screen, you will see a large =, click on that

Choose Attachments from the menu on the left, then choose Add New Attachment

Browse for your document and upload and name

Select external as your definition

When you are done entering PO Req:

Click on pending tasks on left (), it will show you the approval flow

For approvers, no comment is necessary to approve, but a comment is required if you reject it