Link a Contract to a Requisition Quick Reference Guide

1. **eProcurement**
   Requisition Settings

   Name Req: (Name should be easy for you to track)

   Supplier Name

   Ship To (change default if needed)

   Due Date

   Chartfield 1
   fund, dept, acct, (if needed – program, fund source, pc bus unit, proj, activity)

   Click on the "OK" button

2. **Special Request**
   Item Description – Detailed description of item being purchased

   Price

   Quantity

   Add to Cart
   Keep adding to cart for additional lines
   Split % if necessary (under accounting lines)

   Add to Cart

3. **Check Out**
   Go to the line item, click on the "Details" icon (3rd from the right) If this is for "Amount Only" or "Services" – check the "Amount Only" box, and change the "Physical Nature" to "Services"
   Go to the "Contract" line and click on the search icon 
   Then, click the "Search" button this shows all valid contract for this Supplier. (Click on "Contract Detail" tab to see more details of the Contracts)
   Select the appropriate Contract
   Go to the bottom and click on the "OK" button

   3. Check Out – Continued
   Ship to Location
   (If multiple locations, refer to the UPK "Create a Req with multiple ship to's)

   Justification (detail reason for purchase, if required by agency)

   Save for Later

   Pre-Check Budget (see if $ is available)
   Provisionally Valid

   Save & Submit

   **********Wait for Approval********

4. **Manage Requisitions**
   This is where you can edit, cancel, etc.
   Click on your req # to see lifeline
   You can also create a new requisition here

   Check Budget (Pre-Encumber $) Valid
   This is the start of creating a PO

5. **Buyer Center**

   Expedite Req (Search)

   Submit

6. **Buyer Center**
   Manage PO – Search & click on #

   Header Detail (PO Type-click and choose "CONT" for Contract)

   Billing Location

   Enter email address for Dispatching the PO (If the PO needs to be sent to the Supplier, then after dispatching send to C&P, they will get it executed and sent back to you to distribute to the Vendor)

   Click on the "OK" button

   Edit Comments- Any comments needed on the PO can be entered here - Adding Attachments is okay.

   Click on the "OK" button

   Save for Later

   If there is a green checkmark by PO Status, click the green checkmark

   Check Budget (this encumbers the funds). You should get a "VALID" status.

   Click on the "Dispatch" box (this will send the PO to the email from the Header Detail)

   Click on the "OK" button

   Click on the "Yes" button

   **********When Goods Arrive*******

7. **Manage Requisitions (Receiving PO for Goods)**
   Search the "Request State" column for – "PO's Dispatched"

   Check in drop down for Receive "GO"

   Click box "Receive Selected"

   Enter Quantity received

   Click on "Save Receipt"

8. **Scan & Email Invoice**
   Write PO# on invoice

   Scan and email to ap@slco.org with PO# in the email Subject Line