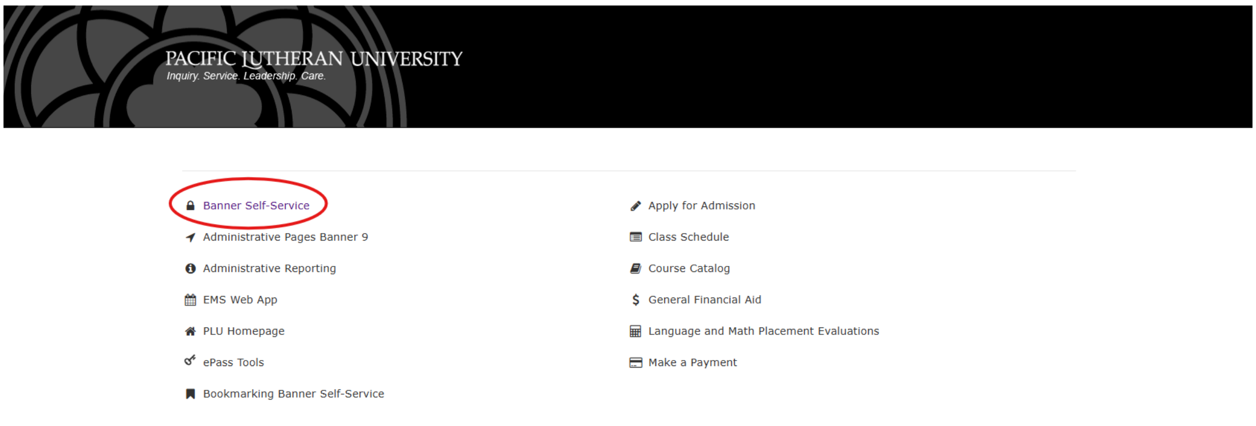
Buyer Process

Purchase Order with a NEW Vendor

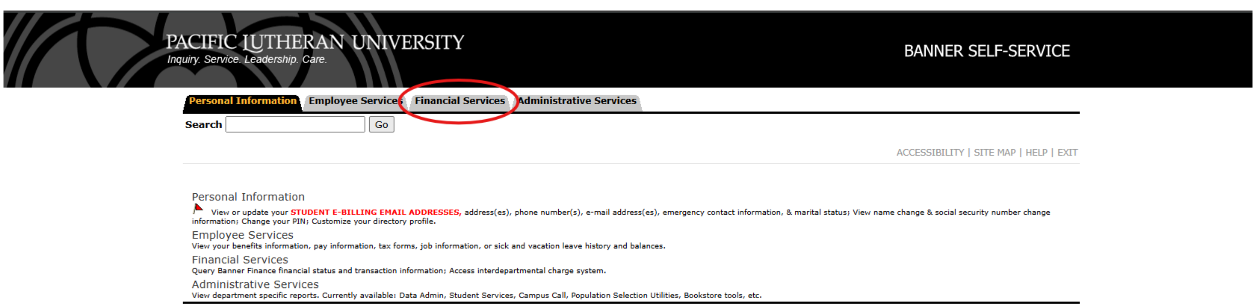
- Please email Orlonda (ocastillo@plu.edu) the vendor information along with a current w9 so she can add them to the system.
- Please do this before you start the requisition process.

Purchase Order - Requisition Form

- Open Banner
- Click Banner Self-Service



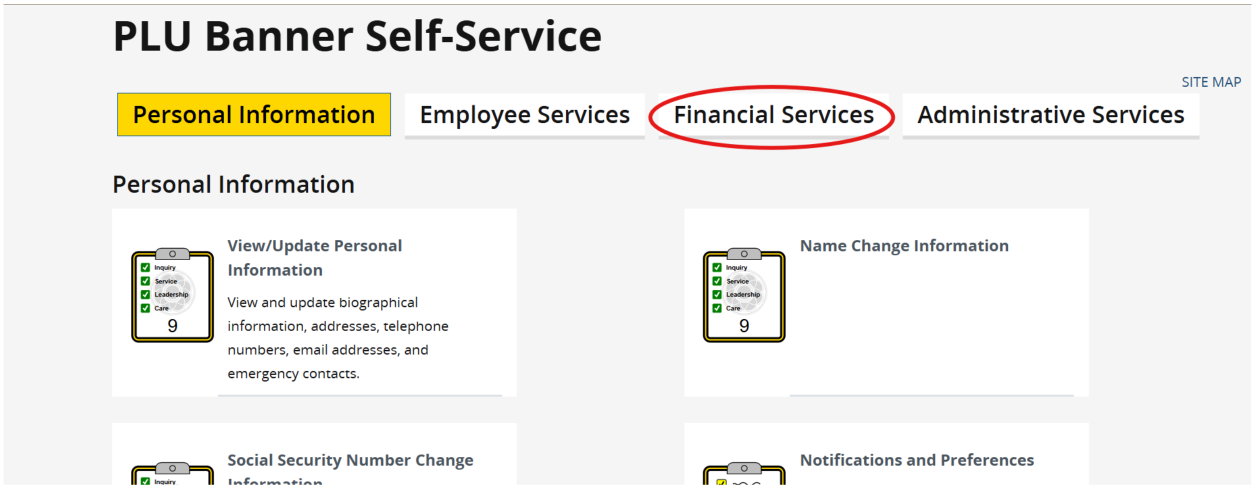
- Click the Financial Services Tab



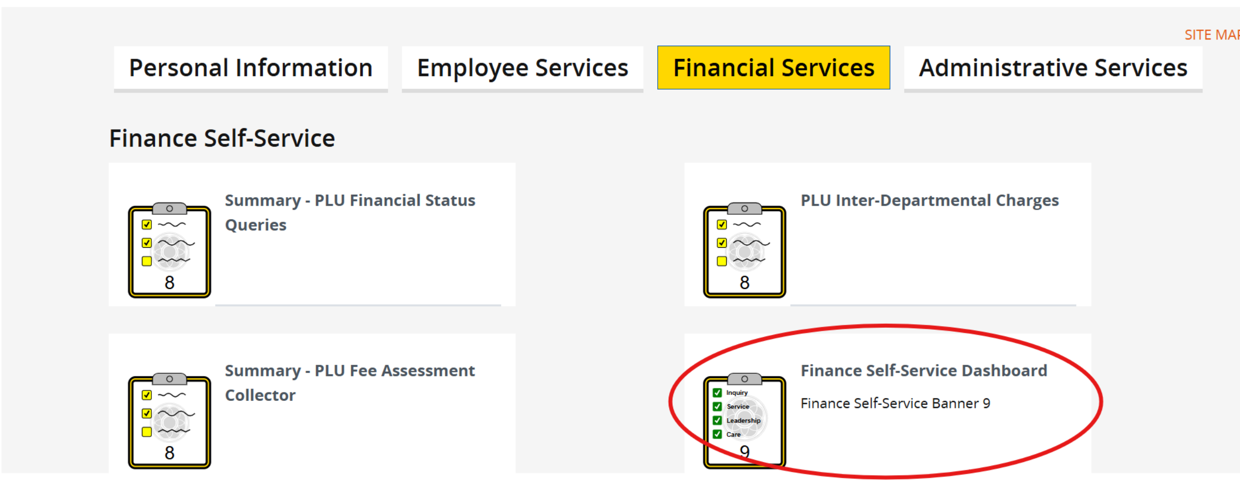
- Click Finance Dashboard

[Insert Photo Here]

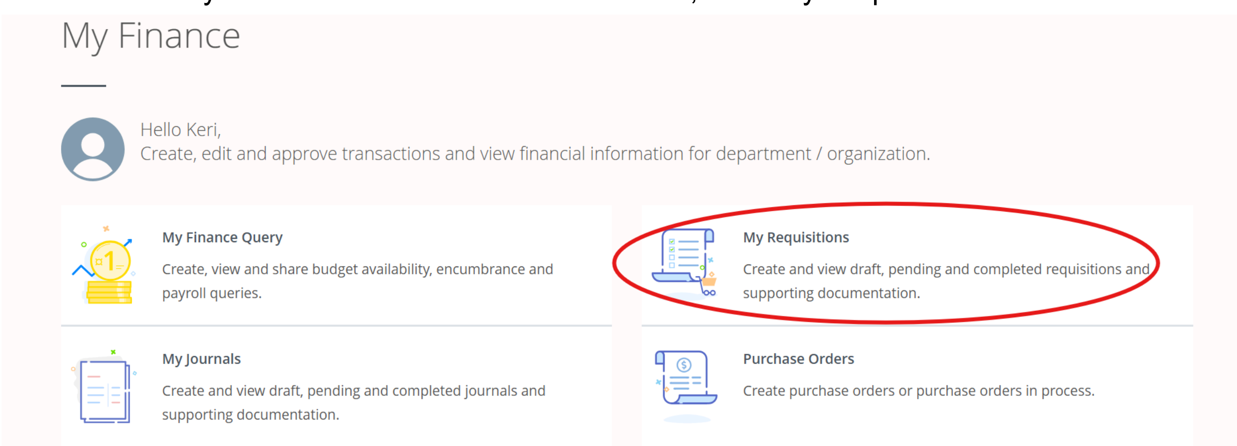
- You will be taken to the Banner Self-Service Dashboard. Navigate to the ‘Financial Services’ tab



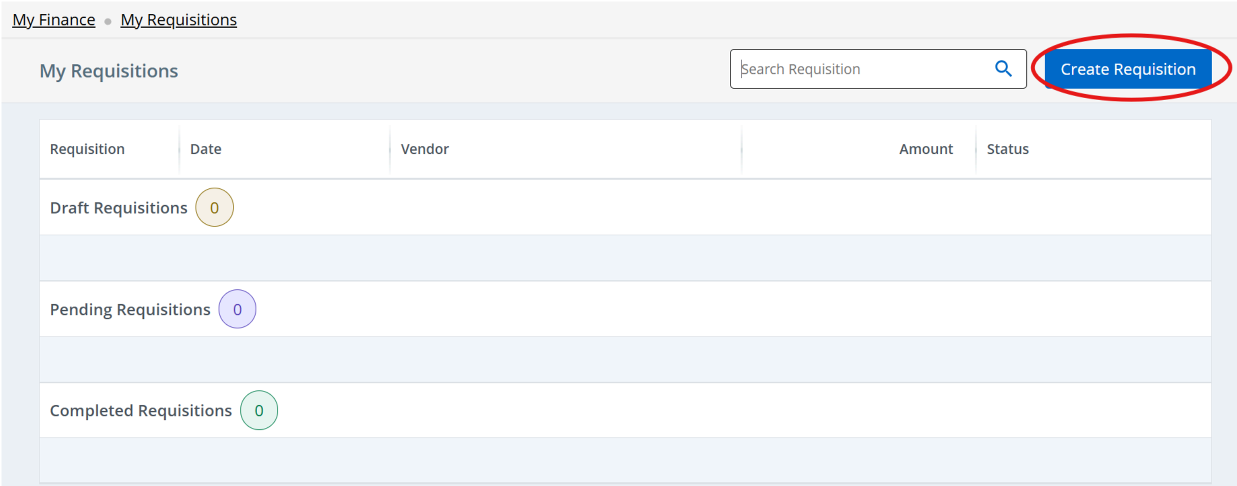
- Once under the ‘Financial Services’ tab click on the ‘Finance Self-Service Dashboard’



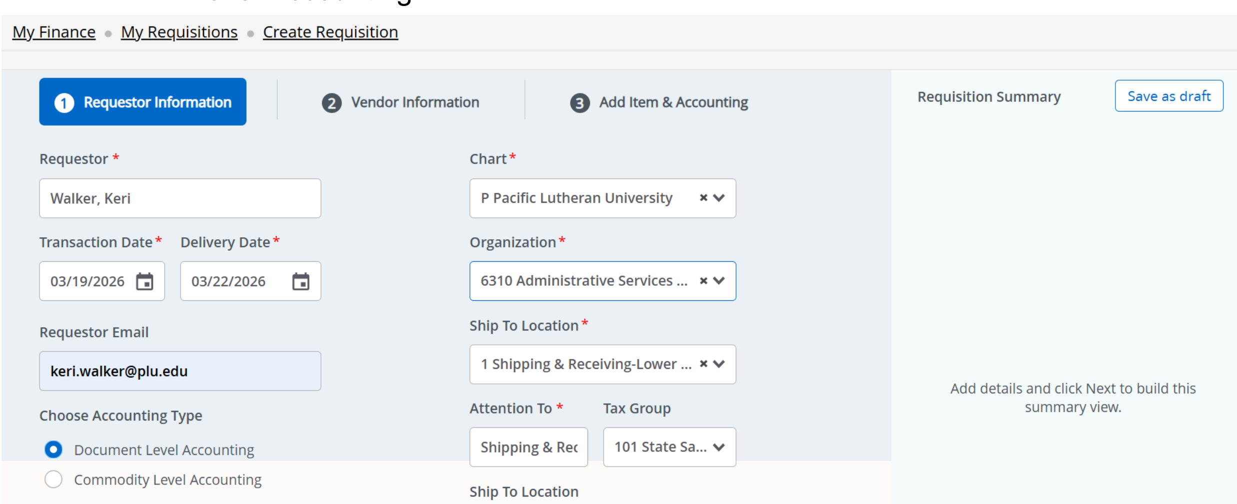
- Once in your Finance Self-Service Dashboard, click ‘My Requisitions’



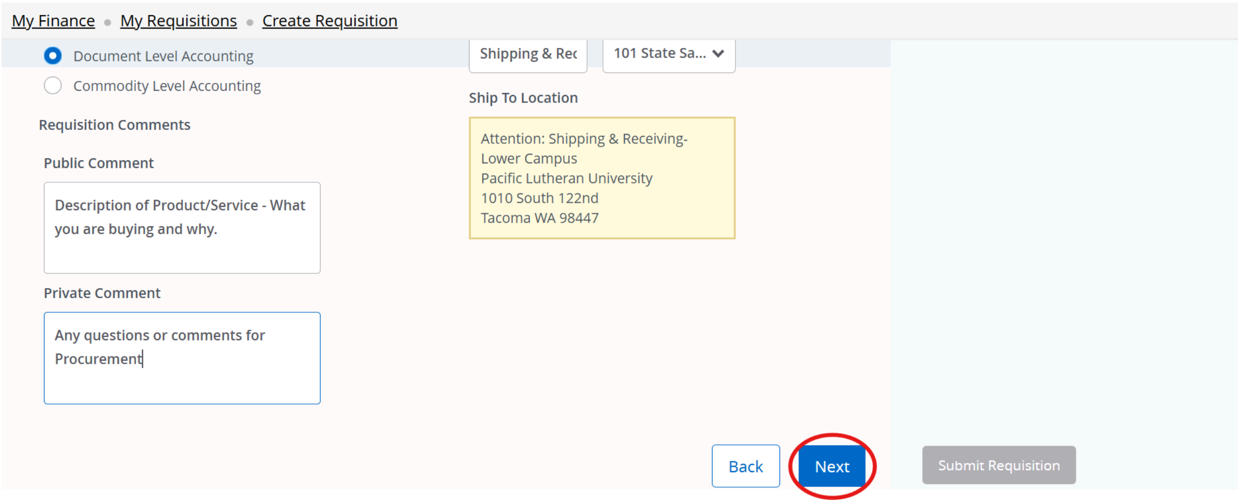
- Here you will see all your requisition drafts, those pending approval, and those completed. At this step, you will click ‘Create a Requisition’ in the top right corner.



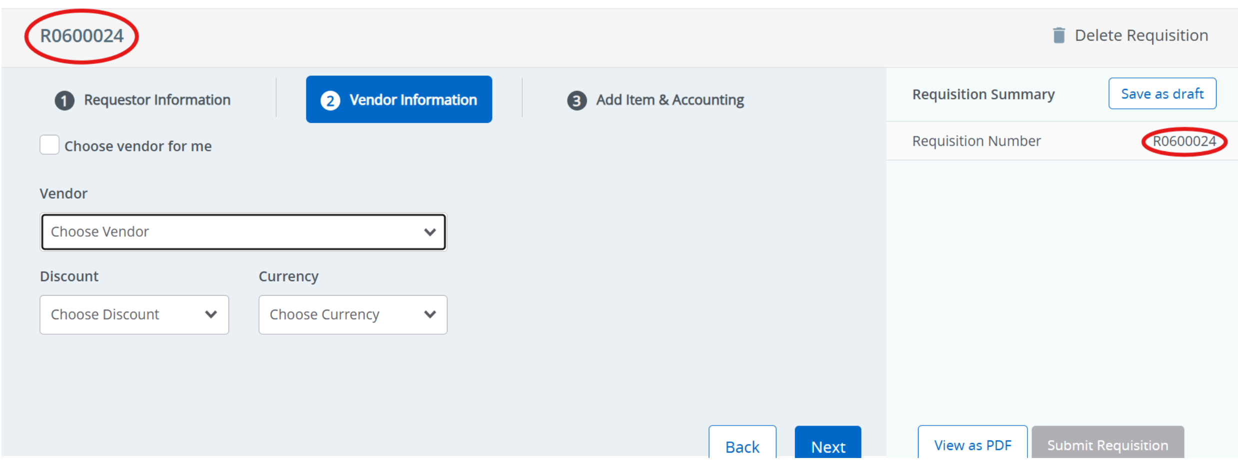
- Here you will fill in all the information required including:
    - Your Name
    - Transaction Date [Today's Date]
    - Delivery Date [When you need the PO by] - Procurement requests at least 3 days to process your PO
    - Your Email Address
    - Chart (leave as is)
    - Organization: Your Department's Org Number (Ex: 6310 - Administrative Services Office)
    - Ship to Location: Click No.1 'Shipping & Receiving - Lower Campus'
    - Attention To (leave as is)
    - Tax Group: Type in 10.2 and click '102 State Sales/Use Tax 10.2%'
    - Choose Accounting Type - Always use 'Document Level Accounting' unless you are splitting ONE item between multiple FOAPS then you would use "Commodity Level Accounting"



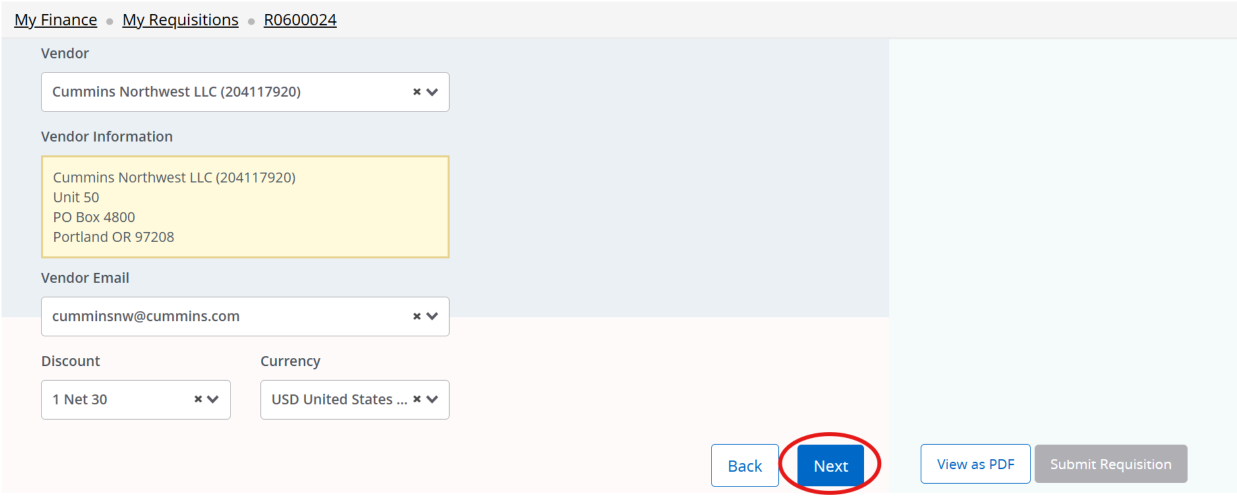
- Scroll down and describe your purchase/service in 'Public Comment'
    - Any questions for Procurement, leave in 'Private Comment'
- Click 'Next'



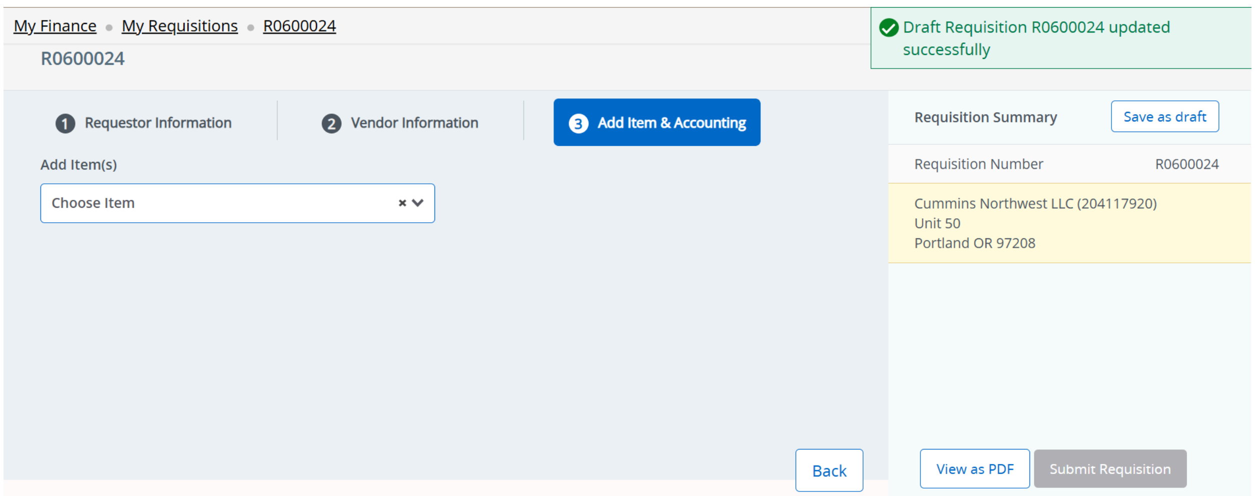
- The next tab is 'Vendor Information'
  - Note your requisition numbers (circled in red)
  - Always leave the 'Choose Vendor for me' box UNchecked



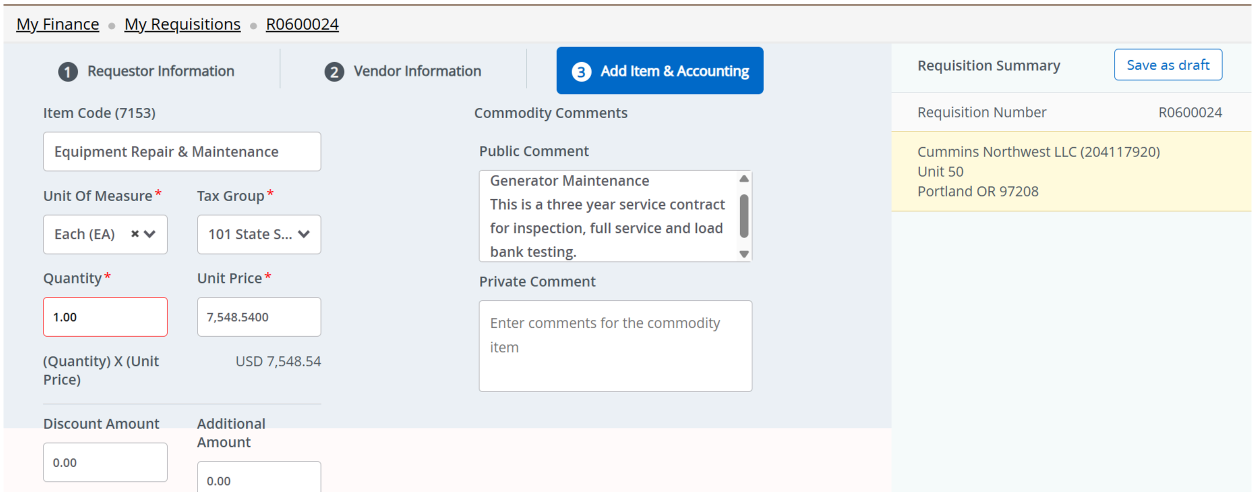
- Type in your Vendor
  - If your Vendor is not popping up, determine if they have been used by the university before.
    - If they have, please email Procurement.
    - If they have not, please go back to step one for Purchase Orders for New Vendors and complete that step.
    - Fill out the Vendor's Email
    - Leave the Discount portion at '1 Net 30'
    - Select USD for Currency
    - Click 'Next'



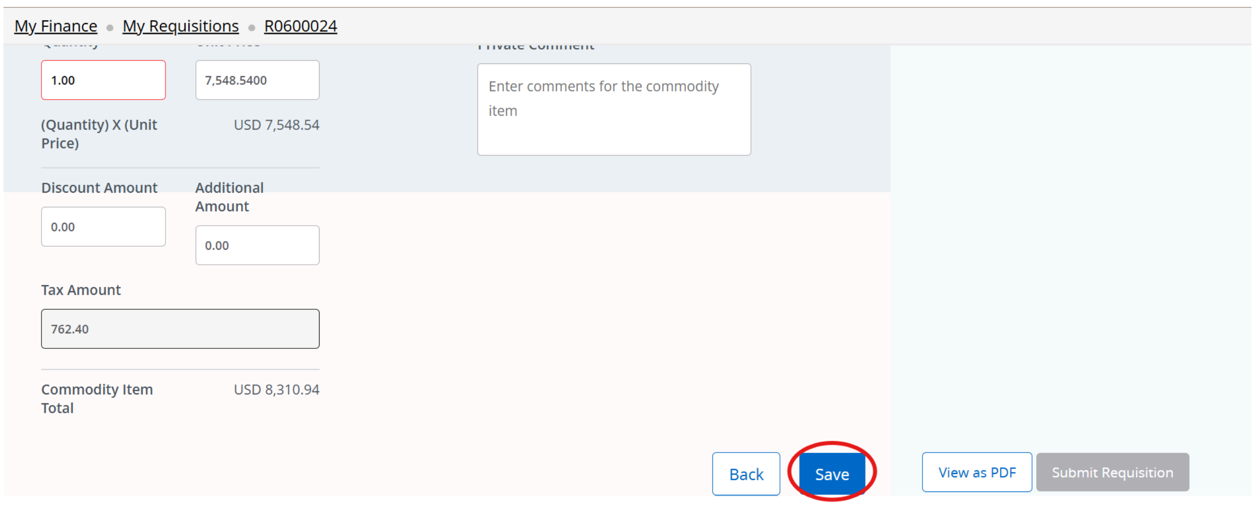
- Now you are in the 'Add Items and Accounting' Tab
    - Here you will start adding the items you will be purchasing.
    - Click 'Choose Item'



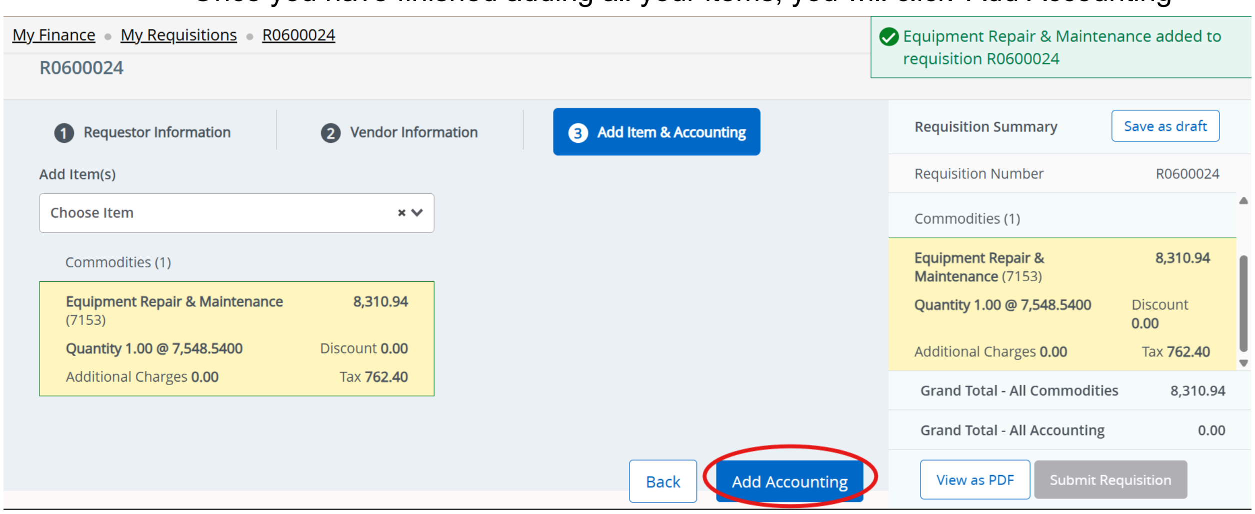
- Type in your item type into 'Choose Item'
    - Use your best judgement here
- Enter the Unit of Measure (EA, BX, CS, etc)
- Tax Group: Double check it is '102 State Sales/Use Tax 10.2%'
- Enter the 'Quantity' and 'Unit Price'
    - The tax should autopopulate for you
- Fill in 'Discount Amount' and 'Additional Amount' as necessary.
- Add the product/service description in the 'Public Comment' section



- Scroll down and click 'Save'

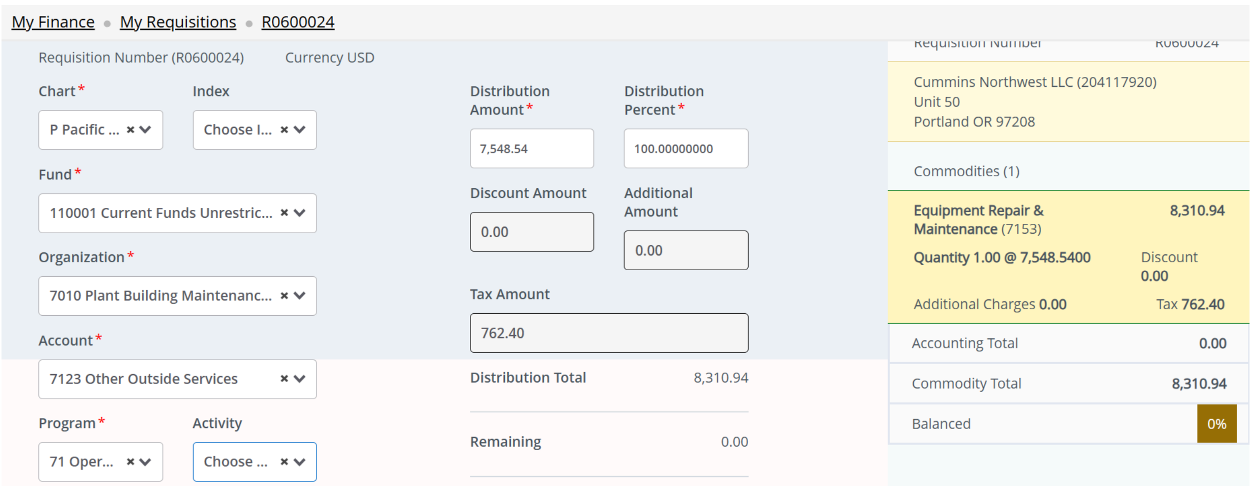


- Once you click 'Save', this screen will pop up.
    - Here is where you can add additional items.
    - Once you have finished adding all your items, you will click 'Add Accounting'

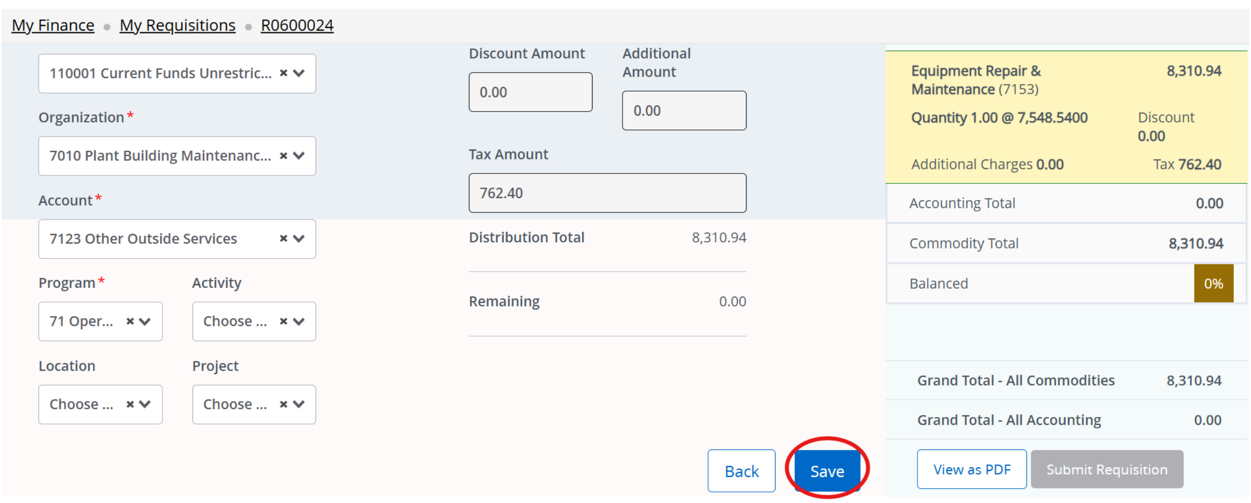


- Here is where you will add the FOAP

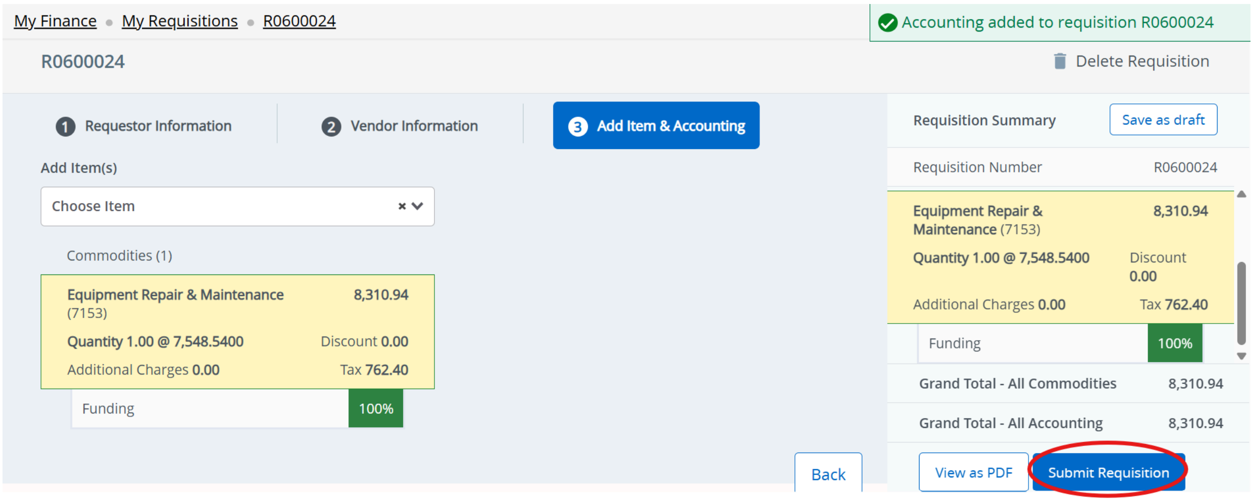
- Leave ‘Chart’ as is
- Go ahead and fill out all of the required fields
    - Fund
    - Organization
    - Account
    - Program
- ‘Distribution Amount’ and ‘DIstribution Percent’ should AutoFill for you
- The remaining fillable sections without red asterisks can be left alone.



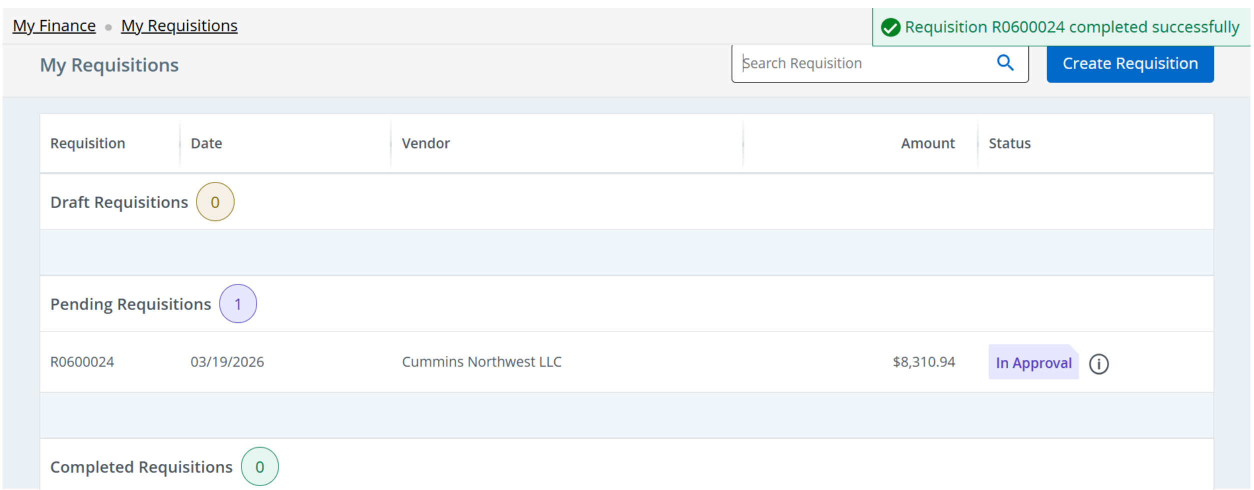
- Scroll down, review the total is accurate and then click ‘Save’



- Review all the information and click ‘Submit Requisition’



- Here is what your screen should look like after you submit your requisition.



- Once approved and processed, we will send you the executed PO. Once received, you are responsible for sending the PO to the vendor.
- **IMPORTANT REMINDER - Once you receive your first invoice from the Vendor for this purchase, you need to add the PO number to the invoice before sending it to Accounts Payable for processing. This is extremely important to avoid messing up the budget.**

<u>How to Delete Draft Requisitions</u>

1. Locate the Draft: Navigate to the "My Requisitions" page.
2. Open Requisition: Click on the draft requisition you wish to delete.
3. Delete: Click the Delete Requisition button (usually located in the top right).
4. Confirm: A prompt will appear asking to confirm; select "Yes" to remove the draft.

<u>How to Recall a Requisition</u>

1. Access My Requisitions: Go to the my requisitions dashboard in Banner Finance Self-Service.
2. Locate the Requisition: Find the requisition in the Pending queue.
3. Open and Recall: Click on the requisition to open it, then click the Recall My Requisition button in the upper right corner.
4. Confirm: Click "Yes" on the prompt to move the requisition back to the Drafts section for editing.

Notes:

- **Restriction:** Requisitions can only be recalled if they have not yet been approved or converted into a Purchase Order (PO).
- **Approval Status:** If the requisition is already approved, you may need to contact your purchasing department to have it returned.
- **Requisition Number:** The original requisition number remains the same after it is recalled