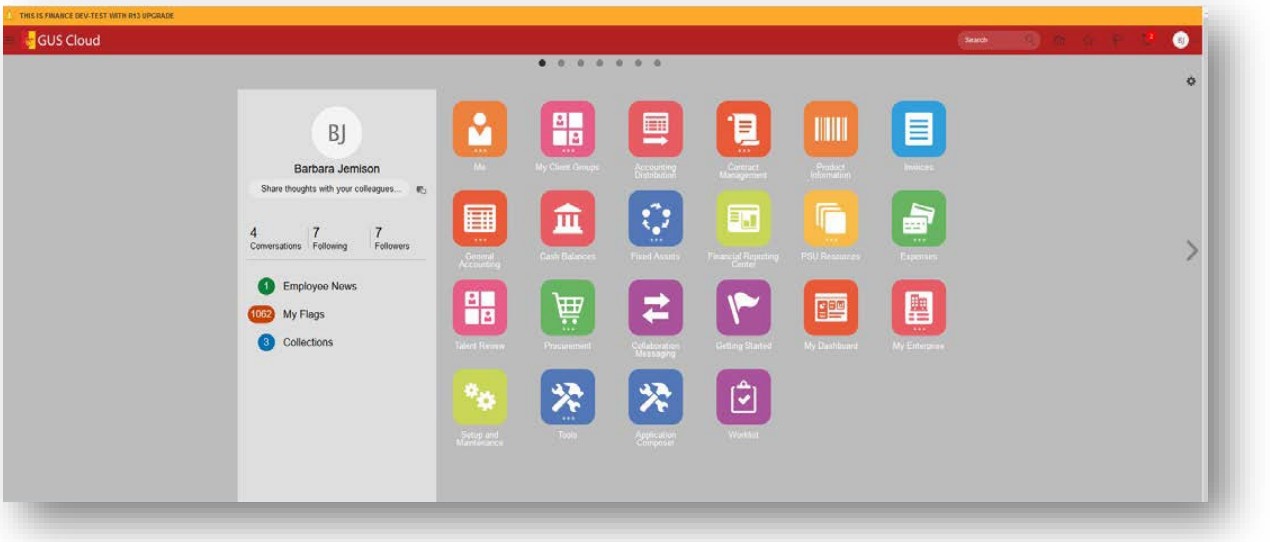
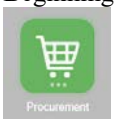
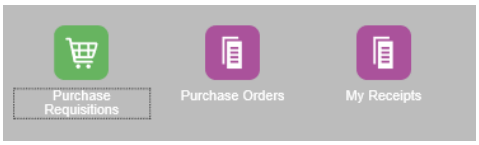
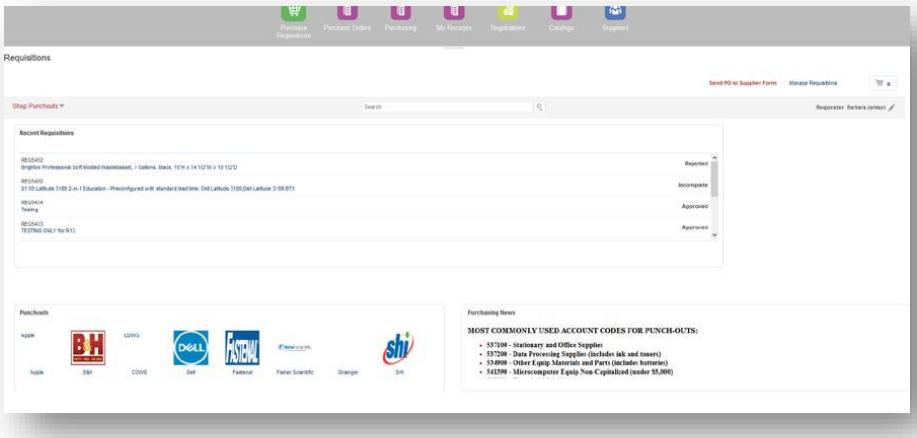
Job Aid

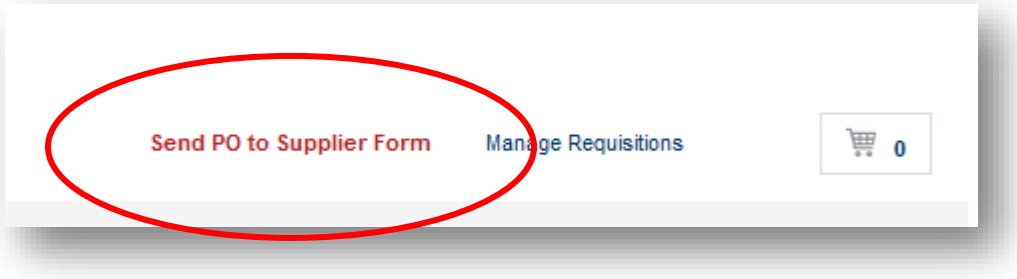
GUS Procurement – Send PO to Supplier

This Job Aid walks through the process of sending (via email) a hard copy Purchase Order to a supplier. (Bids, Quotes, and special orders outside of Punch-Outs)



Step	Action
1.	Beginning from your Home Springboard (shown above) Click on your Procurement Icon  to revel your sub-modules  Then click on the Purchase Requisitions icon to shop
Step	**Action**

2.	This takes you to your **Purchase Requisitions** page: 

Step	Action
3.	Click on the Send PO to Supplier Form link in the top right of your screen. 

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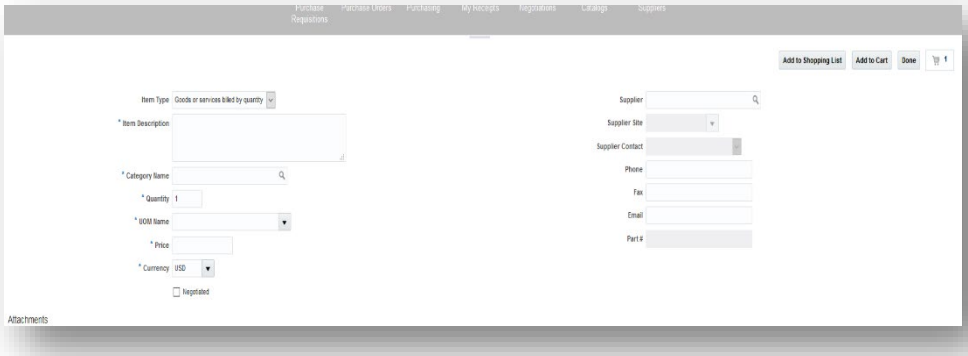
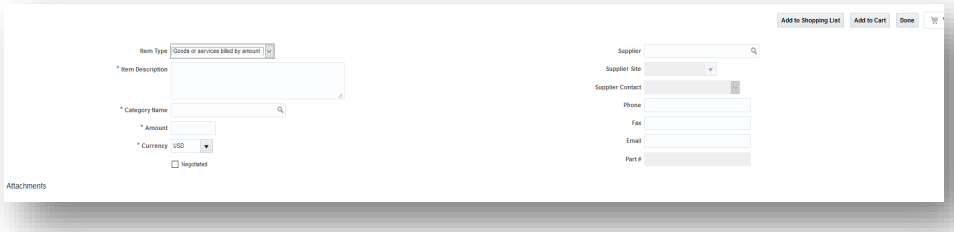
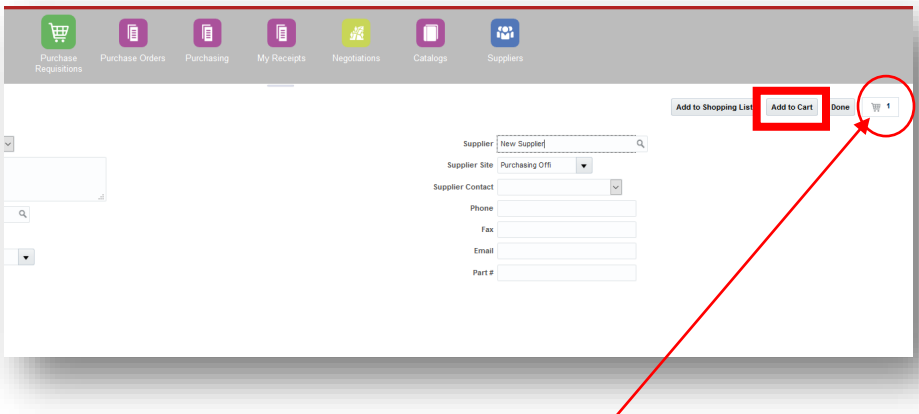
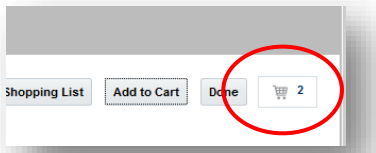
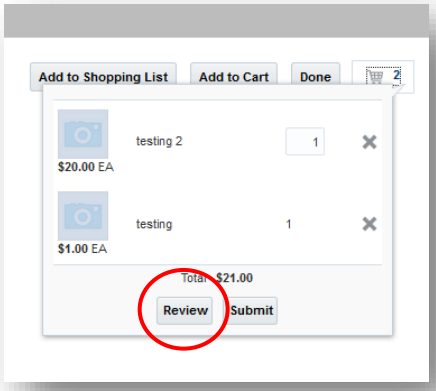
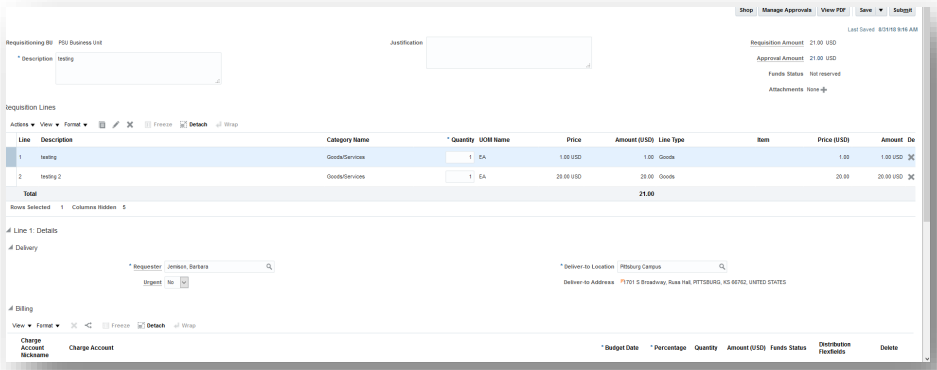
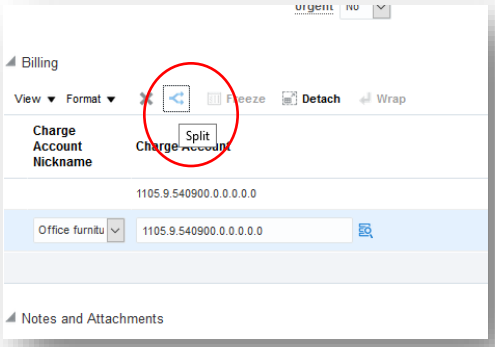
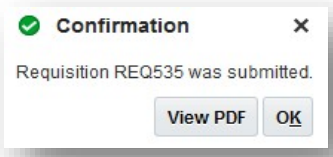
Step	Action
4.	Complete the form with all required information, marked with an asterisk*. ** Note that there are two available forms. - Goods and services **billed by quantity** (for a list of one or more items you expect to receive in each; tangible items) - Good and services **billed by amount** (for a special order or service you expect to receive in full at one time for payment; services) ▪ **Item Description**: Provide as much information here as needed in order that it is clearly understood what the purchase is and what purpose it serves. ▪ **UOM**: Unit Of Measure. Ex: Each, Pack, Case, etc. ▪ **Category Name**: Category Name should be Goods/ Services ▪ **Amount:** Enter the total amount of order ▪ **Supplier:** start typing and allow system to autofill, or use the search icon to lookup your supplier name.  

6.	**Note: If the supplier is new, enter **"New Supplier"** for name. Attach W9 and contact information along with any other info you have such as a quote.
7.	Once you have entered all your info on the form, Click the button **Add to Cart**  Continue steps 4-7 until all your items are in your cart. You can view how many lines are in your cart by the number showing.

Step	Action

8.	Click on the **Shopping Cart** icon button and then the **Review** button to finish your order and to add funding and attachments.  
9.	The Requisition Page: 

10.	Complete the form by changing your description to state the purpose of the entire order; enter justification if needed; add appropriate funding, per line of requisition; and change your deliver to location if needed. *Note that *each line* will be assigned your "Primary Key" default funding. If that is not the funding you want to use, you will have to have funding for *each line*. Split funding is done at the line level of billing 
11.	Add any notes to the supplier, add your attachments and double check your address to supplier.
12.	**Save** and **Submit** Order when ready.
13.	Verify Order is complete by seeing it in your My Requisitions area. Check the status to see if the order has any errors (Incomplete), is pending approval, etc. Once the order has been sent to the Supplier, a PON# will appear attached to your Requisition.
14.	Confirmation page including **Requisition Number** is displayed. By clicking **View PDF**, the document will open in a new window in a pdf file format. 
Step	**Action**

15.	Click OK to close the confirmation box.
16.	*All Send PO to Supplier Orders will require **Receipting** once the product has arrived. (Please see Receipting Job Aid for instructions)
17.	*Once Purchase Order items have been received, and Receipting is complete, the requester will need **to email the Invoice to Invoice Imaging Scan queue for payment**. (Please see Invoice Imagining Job Aid for instructions)
18.	Congratulations! You have reached the end of this tutorial. End of Process.

***These items are not part of the actual Send PO to Supplier, but are necessary steps after the PO has been sent in order to complete the full process all the way to payment.**