PURCHASE ORDER GUIDE

Things to consider before, during and after a purchase order is requested

If you need additional assistance, contact the Purchasing Office

WHAT YOU NEED TO KNOW

CONTRACTS

All contracts, REGARDLESS OF VALUE*, should follow the Contract Routing process and be sent to* ***Katie Lienert*** *for review and routing.*

Remember to attach a Contract Routing Form!

DOCUMENTATION

Make sure you have all required documentation ***BEFORE*** submitting a requisition, such as an official quote dated within 30 days, IT/Facilities approval, approved 303, sale source documentation, waiver, **FULLY EXCUTED CONTRACT, etc**

Make sure you have suffiecient funds before keying a requisition!!!

VENDORS

VENDOR ID - If you do not know it, you will need to look it up using the CODE LOOKUP section in EZ-Arts. Place percents signs (%) around the criteria, which acts as a wild card!

If the vendor is new, a vendor registration form and W9 must be submitted using the online form located on the Purchasing webpage. The vendor must submit a valid UNCSA contact name, otherwise registration will be delayed!

REQUISITION

Use the DOCUMENT TEXT to key in specefic information about your order, such as :

Contract Information
Dates of Service
Quote /Reference/Proposal #
IT Approval Request #
Fixed Assets - Equip. Manager / Custodian / Location
Standing Order (multiple payments)

FUNDING

Enter your Fund# in the INDEX field, then click VALIDATE. This will take the INDEX and auto-populate your Fund, Orgn, and Program Code.

Make sure the correct ACCOUNT socde is used and funds are available!

Account codes ending with XX000P are not valid!

COMMODITY CODE

Each line item will require this code and must be entered using the format: **XXXXX**

Codes beginning with **70** through **93** are used for **SERVICES ONLY**. All other numbers are for goods.

RECEIVING (Regular POs) – once goods/services listed on the PO have been received, send an email to ***BANNER_APP_RECEIVING*** to acknowledge receipt of goods/services.

Depending on how the vendor renders the goods/services, all line items or individual lines can be received.

STANDING ORDER – Receiving is not required for standing orders. Vendors submit invoices directly to Accounts Payable for payment.

CLOSING A PO – If there is a remaining balance of LESS than $5, the PO will close automatically. If there is a remaining balance of MORE than $5 and the goods/services have been rendered, you must submit an email to the Purchasing Inbox to close the PO.

You must include the PO number and vendor name when sending the request.

CHANGE ORDER – For specific reasons, a PO may need to be changed after it's been created. Send an email to the Purchasing Inbox along with supporting documentation and state:

1. what line of the PO needs to be changed
2. how it needs to be changed
3. **WHY** it needs to be changed

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