

# Entering a Traditional Purchase Order

## TEAMS - Finance

▼ FIN - Requisition - Create ▲  
▼ Create Requisitions

Selected Position: 4159 Role Name: Accountant

Select Requisition Type

**Requisition Types**

Requisition \*  Traditional (New)  
Type:  Warehouse (New)  
 Saved Carts  
 Not To Exceed Requisition -  
Maximum Amount \$500  
 Project


Fiscal Year: \* 2017 ▼  
Process Lines \*  Yes  No  
Separately:  
Confirmation \*  Yes  No  
Only:  
Cart Name: \* Traditional Michele Seese 09-07-2016 Cart #1

Continue Cancel

Choose Traditional

Create Requisition Line Items

**Traditional Requisition Header**

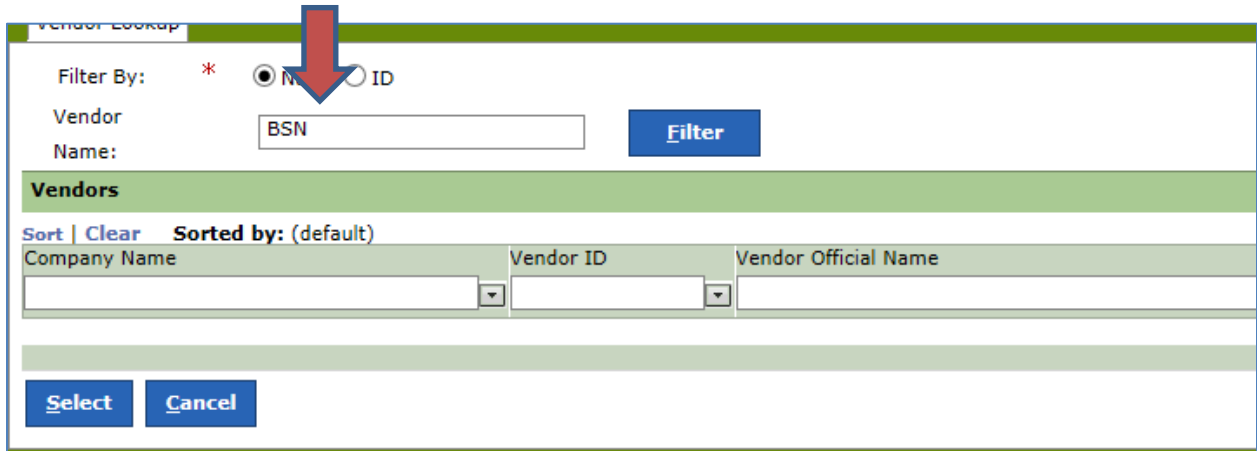
Category: \*  ▼ Vendor: \*  ▼   
Contract:  ▼ Order From: \*  ▼  
Requestor: \* Seese, Michele Lea - 3691508 ▼  
Ship-To Location: \*  ▼ Ship-To Receiving \*  ▼  
Group:

Messages

Add Line Items Clear

Enter Vendor first or search for vendor - this will populate the category type (if you enter category first, it will populate the vendors associated with that category)

To search for vendor enter here and click filter



Vendor Lookup

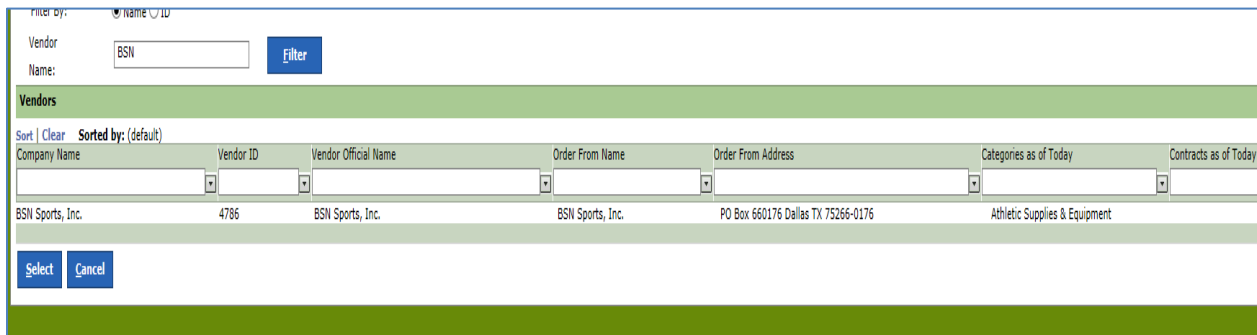
Filter By: \*  Name  ID

Vendor Name:

**Vendors**

Sort | Clear Sorted by: (default)

Company Name	Vendor ID	Vendor Official Name
<input type="text"/>	<input type="text"/>	<input type="text"/>



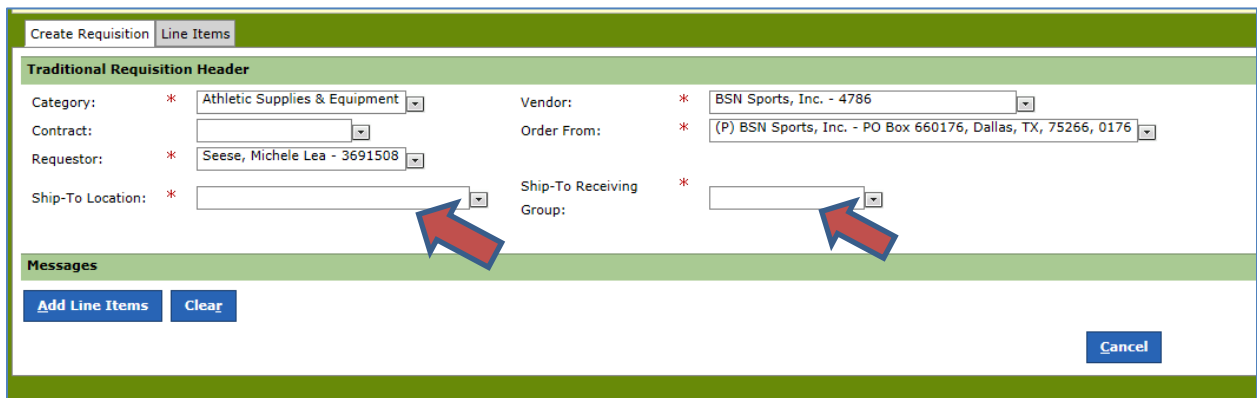
Filter by:  Name  ID

Vendor Name:

**Vendors**

Sort | Clear Sorted by: (default)

Company Name	Vendor ID	Vendor Official Name	Order From Name	Order From Address	Categories as of Today	Contracts as of Today
BSN Sports, Inc.	4786	BSN Sports, Inc.	BSN Sports, Inc.	PO Box 660176 Dallas TX 75266-0176	Athletic Supplies & Equipment	




Create Requisition | Line Items

**Traditional Requisition Header**

Category: \* Athletic Supplies & Equipment


Contract:

Requestor: \* Seese, Michele Lea - 3691508

Ship-To Location: \*  

Vendor: \* BSN Sports, Inc. - 4786

Order From: \* (P) BSN Sports, Inc. - PO Box 660176, Dallas, TX, 75266, 0176

Ship-To Receiving Group: \*  

**Messages**

If you prefer the Distribution Center to receive the items, select Distribution Center for the Ship-To location and the receiving group will populate to Warehouse then enter Distribution Center for the Delivery Location and they will be responsible for receiving the items physically and in TEAMS.

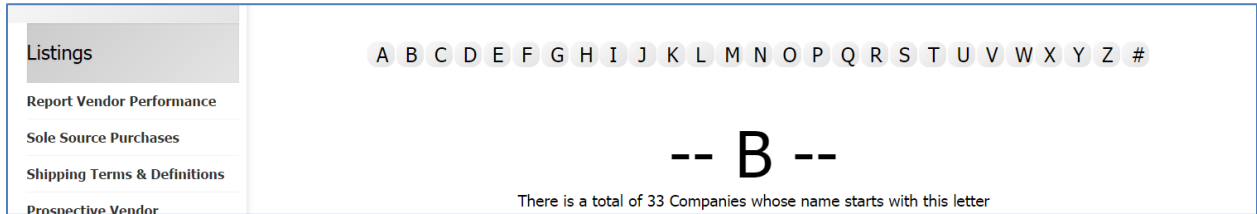


To obtain Special Instructions and other important information regarding the vendors -

Go to the Purchasing Website on the CFB webpage:

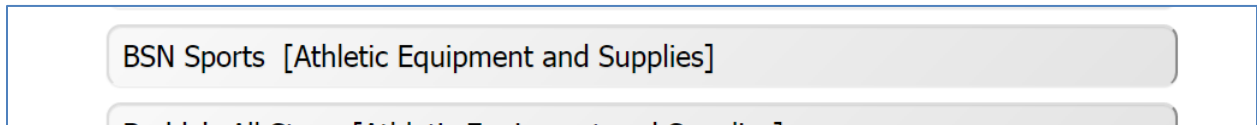
Departments/Administrative & Support Services/Purchasing

Select Vendor/Listings/By Name



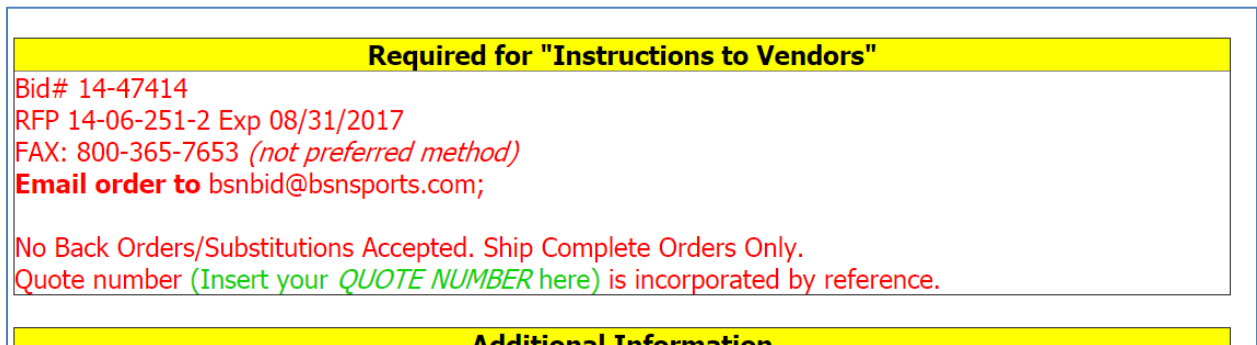
The screenshot shows a web interface for selecting vendors. On the left is a sidebar with menu items: Listings, Report Vendor Performance, Sole Source Purchases, Shipping Terms & Definitions, and Prospective Vendor. The main area features a row of buttons for letters A through Z and a hash symbol. The letter 'B' is highlighted, and below it, the text reads: "-- B --" and "There is a total of 33 Companies whose name starts with this letter".

Example:



The screenshot shows a single vendor selection result in a light gray box: "BSN Sports [Athletic Equipment and Supplies]". Below it, another box is partially visible, showing "B...".

Select and right click to copy - to paste in the Special Instruction field in TEAMS you have to use the Control V command.




The screenshot shows a yellow highlighted box with the following text:  
**Required for "Instructions to Vendors"**  
Bid# 14-47414  
RFP 14-06-251-2 Exp 08/31/2017  
FAX: 800-365-7653 (*not preferred method*)  
**Email order to** bsnbid@bsnsports.com;  
No Back Orders/Substitutions Accepted. Ship Complete Orders Only.  
Quote number (Insert your *QUOTE NUMBER* here) is incorporated by reference.

Enter a Unit Price

Enter Account Code

Save as Fav.?	Quantity	Vendor Stock Number	Unit of Measure	Short Description	Justification	Special Instructions	Unit Price	Unit Descr.	Total Line Amount	Accounts	Type
<input type="checkbox"/>	6	NK684690	Each	Blk/Blue-Nike	Baseball Game	Bid# 14-47414 RFP 14-06-25 FAX: 800-365- Email order to	63.00	0.00	378.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional



**Add Line(s)**

Number of Lines to Add:

**Requisition Attachments**

Description

You can choose to add several lines here – please remember to change the account code if it needs to change. The original account code automatically populates in all additional lines when multiple lines are added.

Selected Position: 4159      Role Name: Accountant      Cart Name: Traditional Michele Seese 09-07-2016 Cart #3      Fiscal Year: 2016

Procurement Category: Athletic Supplies & Equipment      Vendor: BSN Sports, Inc. (BSN Sports, Inc.)      Ship To Location: Turner High School      Ship To: Turner High School

**Traditional Requisition Line Items**

Show Install?:  Yes  No      Show Freight?:  Yes  No      Show Tax?:  Yes  No      Split Accounts By Type?:  Yes  No      Cart Total Amount: **\$1648.98**

Save as Fav.?	Quantity	Vendor Stock Number	Unit of Measure	Short Description	Justification	Special Instructions	Unit Price	Unit Descr.	Total Line Amount	Accounts	Type
<input type="checkbox"/>	6	NK684690	Each	Blk/Blue-Nike Lunar MVP Pregame 2 Shoes	Baseball	Bid# 14-47414 RFP 14-06-25 FAX: 800-365- Email order to	63.00	0.00	378.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input type="checkbox"/>	2	1391738	Each	BB16S400 - 3 BBCOR 33/30	Baseball		76.00	0.00	152.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input type="checkbox"/>	2	AA5069P	Each	Black-Adult Tech Short	Baseball		11.99	0.00	23.98	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input type="checkbox"/>	2	UA1250411	Each	Black, white-Youth Heatgear Lo Cut 3 PK	Baseball		10.00	0.00	20.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input type="checkbox"/>	20	AA506C1	Each	Roy/Wht Adult Crew Neck Baseball Jersey	Baseball		12.00	0.00	240.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input type="checkbox"/>	20	UA1258054	Each	White, Royal Clean up piped baseball pants	Baseball		23.00	0.00	460.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional
<input checked="" type="checkbox"/>	30	BRG185	Each	Sport GY-Heavy Bland 50/50 Hood	Baseball		12.50	0.00	375.00	181-36-6399-B4-001-99-000 - 100.0%	Traditional

**Requisition Attachments**

File: BSN Baseball Quote 10-9-15.pdf      Description:

Click Submit

Once submitted, you can verify the funds have been encumbered by going to My Accounts and entering the account code or one of the account codes. The funds are encumbered as soon as you hit submit.

The screenshot shows a navigation menu with the following items:

- FIN - Requisition - Create (expanded)
  - Create Requisitions
  - Requisition Search
  - Blanket/Project Requisition Search
  - Not To Exceed Requisition Search
  - Organization PO Search
  - My Accounts** (highlighted with a red arrow)
  - Receive
  - Vendor Lookup/Accounting
  - Purchasing Catalog
- EMP - Employee Search
- FIN - End of Year

Enter account number for example: 181-36-6399-B4-001-99-000

The screenshot shows a search interface with the following details:

- Fiscal Year: 2017
- Account Number: 181 - 36 - 6399 - B4 - 001 - 99 - 000
- Search button and Load All checkbox are visible.
- Results table showing one entry:

Account Number	Owner	Year	Account Name	Adopted Budget	Budget Changes	Amended Budget	Budget Encumbrances	Beginning Transactions	Encumbrances	Unapproved Journal Entries	Transactions	Balance	Worksheet Alloc
181-36-6399-B4-001-99-000	980-B4	2017	General Supplies	3,240.00	0.00	3,240.00	0.00	0.00	1,648.98	0.00	0.00	1,591.02	Departments

A red arrow points to the results table. Below the table is a 'New Period Summary' button.

Budget String: 181-36-6399-B4-001-99-000      2017      Account Name: General Supplies

Period Summary

Period Summary

Sort | Clear    Sorted by: (default)

Period	Adopted Budget	Beginning Transactions	Amendments	Unapproved Journal Entries	Amended Budget	Budget Encumbrance	Encumbrance	Transactions	Balance
September	3,240.00	0.00	0.00	0.00	3,240.00	0.00	1,648.98	0.00	0.00
October					3,240.00	0.00	0.00	0.00	0.00
November					3,240.00	0.00	0.00	0.00	0.00
December					3,240.00	0.00	0.00	0.00	0.00
January					3,240.00	0.00	0.00	0.00	0.00
February					3,240.00	0.00	0.00	0.00	0.00
March					3,240.00	0.00	0.00	0.00	0.00
April					3,240.00	0.00	0.00	0.00	0.00
May					3,240.00	0.00	0.00	0.00	0.00
June					3,240.00	0.00	0.00	0.00	0.00
July					3,240.00	0.00	0.00	0.00	0.00
August					3,240.00	0.00	0.00	0.00	0.00

Back

GL Accounts for Budget

Sort | Clear    Sorted by: (default)

Account Number	Owner	Year	Account Name	Unapproved Journal Entries	Ledger Encumbrances	Beginning Transactions	Transactions
181-36-6399-B4-001-99-000	980-B4	2017	General Supplies	0.00	1,648.98	0.00	0.00

Sync Accounts

You can continue to drill down for more information related to that encumbrance.

You will receive notice of the PO# from Purchasing by email. You must click on the link in the email to process the PO. You then need to submit the PO to the vendor.

## Receiving a Traditional Purchase Order

**FIN - Requisition - Create**

- Create Requisitions
- Requisition Search
- Blanket/Project Requisition Search
- Not To Exceed Requisition Search
- Organization PO Search
- My Accounts
- Receive
- Vendor Lookup/Accounting
- Purchasing Catalog

**EMP - Employee Search**

**FIN - End of Year**

Highlight and double click the first line

**Search Criteria**

Purchase Order Number: 132171 Vendor:

Description:  Part Number:

Min Date:

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**Purchase Orders**

Sort | Clear Sorted by: (default)

Purchase Order Number	Vendor Name	Requestor	Stock Number	Short Description	Unit of Measure	Ordered Quantity	Received Quantity	Expected Quantity	Canceled Quantity	Free Quantity Recvd	Warehouse
132171	BSN Sports, Inc.	Seese, Michele Lea	BRG185	Sport GY-Heavy Bland 50/50 Hood	EA	30.0	0.0	30.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	UA1258054	White, Royal Clean up piped baseball pants	EA	20.0	0.0	20.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	AA506C1	Roy/Wht Adult Crew Neck Baseball Jersey	EA	20.0	0.0	20.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	UA1250411	Black, white-Youth Heatgear Lo Cut 3 Pk	EA	2.0	0.0	2.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	AA5069P	Black-Adult Tech Short	EA	2.0	0.0	2.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	1391738	BB16S400 - 3 BBCOR 33/30	EA	2.0	0.0	2.0	0.0	0.0	
132171	BSN Sports, Inc.	Seese, Michele Lea	NK684690	BLK/Blue-Nike Lunar MVP Pregame 2 Shoes	EA	6.0	0.0	6.0	0.0	0.0	

Selected Position: 4159 Role Name: Accountant PO Num: 132171 Vendor: BSN Sports, Inc.

Ship-To Location: Turner High School Status: Sent Stage: PO PO Creation Date: 09-07

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**Receiving Details**

Show  Yes  No Received Date: \* 09-07-2016 12:03 PM

Configure columns

Requestor	Stock Number	Short Description	Unit of Measure	Ordered Quantity	Expected Quantity	Received Quantity	Free Quantity Recvd	Not Delivered Quantity	Asset Review Decision	Potential Asset	Existing Assets
Support Services	NK684690	BLK/Blue-Nike Lunar MVP	EA	6.0	6.0	0.0	0.0	6.0	Not Reviewed		
Support Services	1391738	BB16S400 - 3 BBCOR 33	EA	2.0	2.0	0.0	0.0	2.0	Not Reviewed		
Support Services	AA5069P	Black-Adult Tech Short	EA	2.0	2.0	0.0	0.0	2.0	Not Reviewed		
Support Services	UA1250411	Black, white-Youth Heatge	EA	2.0	2.0	0.0	0.0	2.0	Not Reviewed		
Support Services	AA506C1	Roy/Wht Adult Crew Neck	EA	20.0	20.0	0.0	0.0	20.0	Not Reviewed		
Support Services	UA1258054	White, Royal Clean up pip	EA	20.0	20.0	0.0	0.0	20.0	Not Reviewed		
Support Services	BRG185	Sport GY-Heavy Bland 50	EA	30.0	30.0	0.0	0.0	30.0	Not Reviewed		

Click in the Qty. Received field and enter how many items were received

If you do not receive all the items and do not expect to receive all the items, please let Accounts Payable know (Ext. 6113) so they can close the PO. This will release the remaining encumbered funds back to your account.

You will see a message at the top of the screen that states: **Saved New Receiving Record for PO#XXXXXX**



Please send all original Invoices to Accounts Payable for payment to be processed.



