Small Cost Quick Reference Guide

1. **eProcurement**
   Requisition Settings

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

   Click "Override" if changing account Chartfields

   Supplier Name

   Category by description (formerly commodity)

   Ship To (change default if needed)

   Due Date

   Chartfield 1
   fund, agency, 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)

   Save for Later

3. **Check Out**
   If this is for "Amount Only" or Services – go to the line item, click on the "Details" icon (3rd from the right) check the "Amount Only" box, and change the "Physical Nature" to "Services" go to the bottom and click "OK"

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)

   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 "SM" for Small Cost)

   Billing Location

   Enter email address for Dispatching the PO (Temporarily - dispatch to slco-purchasing@slco.org for signature and C&P will dispatch to the Supplier, unless you specify otherwise)

   Click on the "OK" button

   Edit Comments- add attachments if necessary. ** **Don't add comments or you'll get an error****

   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

   *****Wait to Receive Goods*****

7. **Manage Requisitions (Receiving PO)**
   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