

## Link a Contract to a Requisition 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

Go to the line item, click on the "Details" icon (3<sup>rd</sup> from the right) If this is for "Amount Only" or "Services" – check the "Amount Only" box, and change the "Physical Nature" to "Services"

Go to the "Contract" line and click on the search icon   
Then, click the "Search" button this shows all valid contract for this Supplier. (Click on "Contract Detail" tab to see more details of the Contracts)

Select the appropriate Contract

Go to the bottom and click on the "OK" button

### 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 "CONT"  
for Contract)

Billing Location

Enter email address for Dispatching the PO (If the PO needs to be sent to the Supplier, then enter [slco-purchasing@slco.org](mailto:slco-purchasing@slco.org) for the email address. C&P will execute the PO and send to the Supplier)

Click on the "OK" button

Edit Comments- (**for now, DO NOT add comments**) - Adding Attachments is okay.

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

\*\*\*\*\*When Goods Arrive\*\*\*\*\*

### 7. Manage Requisitions (Receiving PO for Goods)

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](mailto:ap@slco.org) with PO# in the email Subject Line

For more details – Go to UPK – "Create A Requisition for a Contract Purchase"