

# Section 2: eProcurement and invoices

## Ordering Rules

According to Purchasing Policy and Guidelines, departments are authorized to place orders under the small-dollar purchase limit using their p-card or on terms. Orders placed on terms mean that the vendor will provide the product or service and then provide an invoice for payment. See [Purchasing Policy and Guidelines](#) on the [Purchasing and Accounts Payable](#) website for more information.

## Punch-out Vendors

### What is a Punch-out Vendor?

A Punch-out vendor is integrated into SLCCBuy and connects directly to the vendor's website. It will look and behave like you are shopping directly on Amazon, Office Depot, Staples, etc.

### Punch-out Vendor Benefits

Punch-out vendors have negotiated and discounted contracts with the college, and you can benefit from the extra purchasing power of cooperative purchasing organizations. Orders placed from Punch-out Vendors will not require a bid, and most will not need to be reviewed by Purchasing before being sent to the vendor.

Most of our punch-out vendors transmit invoices directly into SLCCBuy and are automatically matched to the appropriate Purchase Order, reducing the paperwork and time needed to reconcile transactions.

## Which vendors have a Punch-out?

- **Airgas**
  - Cylinder gases and welding supplies
- **Amazon Business**
- **America to Go**
  - Catering and Food Trucks
- **Anixter**
  - Wire and cable, networking, security and power supplies
- **B&H Photo/Video**
  - Digital cameras, photography equipment, TVs, audio-visual supplies
- **Bell Janitorial Supply**
- **Bluefin Office Supplies**
- **Brady Industries**
  - Janitorial Supplies
- **Carolina Biological**
  - Life Science products
- **CDW-G**
  - Technology and software
- **Connection**
  - Technology and software
- **Dell**
  - Computers
- **Fastenal**
  - Industrial supplies/MRO
- **Fisher Scientific**
  - Lab equipment and supplies
- **Grainger**
  - Industrial supplies and safety products/MRO
- **Graybar**
  - Lighting and electrical supplies
- **Henry Schein Medical**
  - Medical products
- **Henry Schein Dental**
  - Dental products
- **Home Depot Pro**
- **Lawson Products**
  - Industrial supplies/MRO
- **Lowe's Pro**
- **McKesson**
  - Medical supplies
- **Medline**
  - Medical supplies
- **MSC**
  - Industrial supplies
- **Midwest**
  - Furniture
- **NAPA**
  - Auto Parts
- **ODP Office Solutions (Office Depot)**
  - Office supplies
- **SHI**
  - Software
- **Staples**
  - Office supplies
- **TV Specialists**
  - Audio/visual equipment and supplies
- **VLCM**
  - IT equipment and supplies
- **VWR**
  - Life science products
- **Waxie Janitorial Supply**
- **Workspace Elements**
  - Furniture



































There are also two internally managed catalogs, Office Chairs and SLCC Pepsi Store.

Additional punch-outs will be added as needed.

## Placing a Punch-out Order

To place an order through a Punch-out vendor, visit the Punch-out section of the shopping dashboard. To Punch-out, click on the vendor with whom you want to shop.

Punch-out Vendors

 Airgas	 Allsteel Furniture - Quote Needed	 amazon business Credit Card Only	 ANIXER	 BH	 BELL Industrial Supply
 Bluefin - Office Supplies	 CAROLINA	 CDWG	 Connection we solve IT	 DELL	 FASTENAL
 Fisher Scientific	 GRAINGER	 Graybar	 HENRY SCHEIN Medical	 HENRY SCHEIN Dental	 Home Depot
 LOWE'S PRO	 MCK	 MEDLINE	 MSC	 Midwest Furniture - Quote Needed	 NAPA
 odp Office Depot - \$25 minimum	 shi	 STAPLES	 TV Specialists, Inc. TV Specialists	 VLCM	 VWR We Enable Science
 WAXIE	 Workspace Elements - Furniture	 Office Chairs	 SLCC Pepsi Store		

Since each Punch-out is managed by the respective vendor, each one looks and functions differently. Use the vendor website to shop for the items you need and add them to your cart. When you are done, proceed with the checkout process on the vendor website. At the conclusion of the checkout process on the vendor website, you will be returned to SLCCBuy to complete the checkout process in SLCCBuy. See **Cart Checkout**.

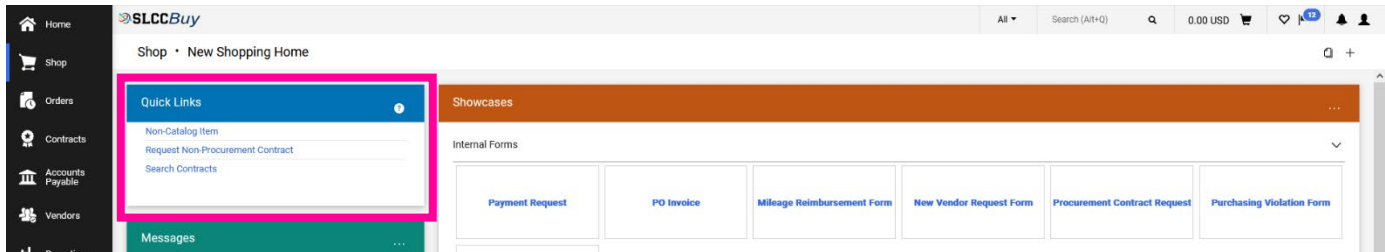
## Punch-Out Vendor – P-Card

The following punch-out vendors will accept a purchasing card as a form of payment.

- Amazon – Required
- Office Depot – Optional/encouraged
- Staples – Optional/encouraged

# Creating a Non-Catalog Requisition

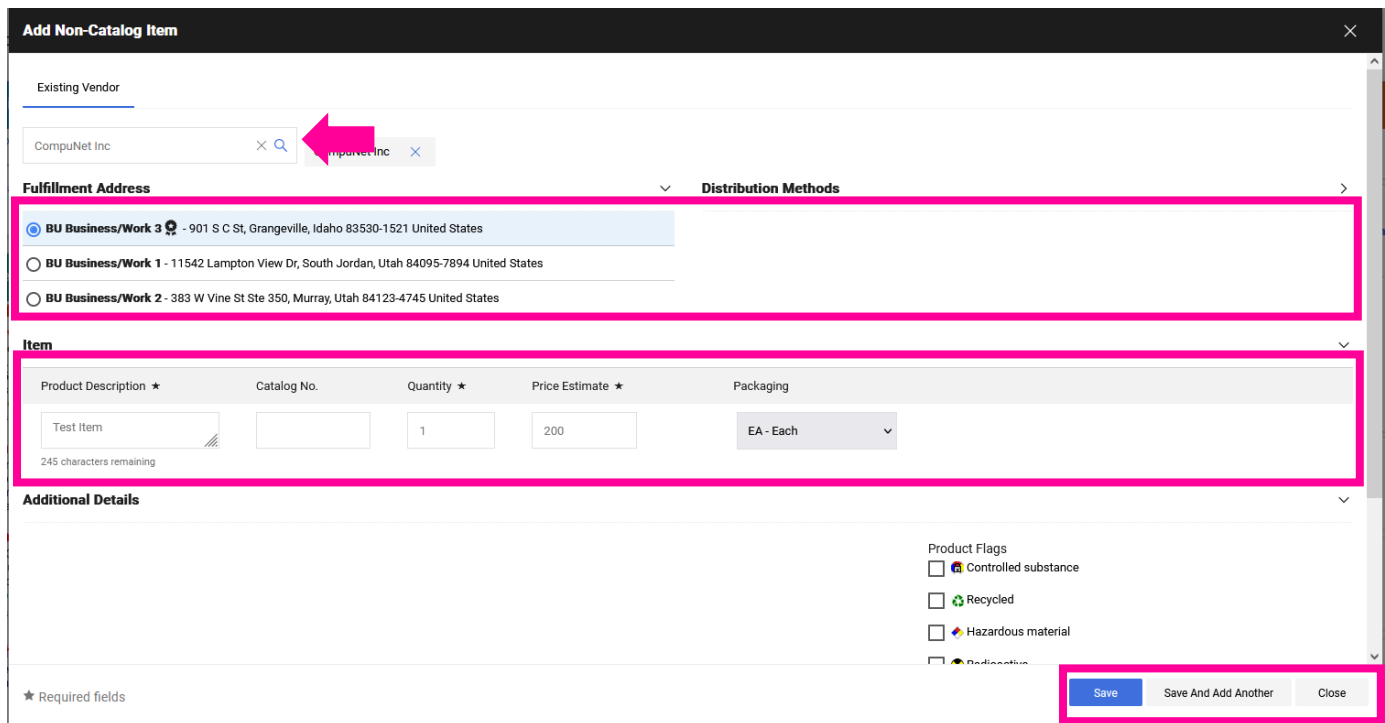
A non-catalog requisition is used to request a PO for a vendor that does not have a punch-out. To start the requisition, select **“Non-Catalog Item”** from the **“Quick Links”** section of the Shopping Dashboard.



The Add Non-Catalog Item dialog box will appear. You will need to first enter your vendor. *If the vendor is not found, they will need to be added to the system. Refer to the instructions for the New Vendor Request Form. Once they have been added to the system, you can proceed with entering your requisition.*

Once you select a vendor, you will see their fulfillment address and distribution method.

Type the description of the item, along with the quantity and price (adjust the packaging as needed; default is EA (each)).



Once you have added your item, you can either save your cart, or add another item from the vendor.

When you have added all needed items, click on the cart on the **Action Bar** to see your cart and complete the checkout process. See **Cart Checkout**.

## Forms

There are two types of forms, **requisition forms**, which are added to carts and **procurement requests** or general forms, which are not added to carts.

### What form should I use?

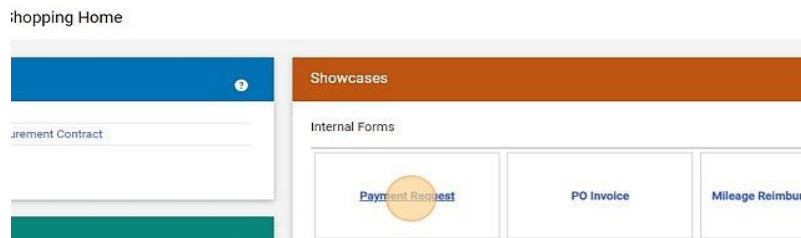
There are multiple forms in SLCCBuy. Below is a quick guide to help you select the correct form. Most forms are requisition forms and are added to a cart. Procurement request forms that are not added to a cart are indicated with an \* and are covered in the Procurement Request Form section.

- **Payment Request** - Use this form to submit invoices for orders that were placed under the small dollar purchase limit or listed on the exceptions list in the [Payment Request Guidelines](#).
- **PO Invoice\*** - Use this form to submit an invoice for an order where a PO was created and to request payment on a procurement contract.
- **Mileage Reimbursement Form** - Use this form to request reimbursement for local mileage. (Mileage related to a travel event must be submitted in Chrome River.)
- **Create New Vendor Request Form\*** - Use this form to request a new vendor be set up in SLCCBuy.
- **Procurement Contract Request** - Use this form to request a procurement contract. A procurement contract is any contract that includes the expenditure of funds (e.g., independent contractors, consultants, professional services, software agreements).
- **Purchasing Violation Form** - Use this form to submit an invoice for an order that was placed without following purchasing rules, such as orders over the small dollar purchase limit, without a PO. (See [Purchasing Violation Guidelines](#) for more information)
- **Non-Catalog Item** - This form is located in the Quick Links section. Use this form to request non-catalog items that need to be ordered using a Purchase Order. Catalog items are purchased using the punch-out vendor catalogs.

# Requisition Forms

## Payment Request Form

1. Click "Payment Request"



2. Type the vendor's name in the "Enter Vendor" field. As you type, the system will search for the vendor. When it is displayed, click on it.

### Payee Information

The 'Payee Information' section has two tabs: 'Existing Vendor' and 'Enter Manually'. The 'Enter Vendor' field is active, showing the text 'compunet' and a search icon. A dropdown menu below the field displays 'CompuNet Inc' as a search result, which is highlighted with a yellow circle.

3. In the "Product Description" field, type a description for the payment.

### Payment Request Information

The 'Payment Request Information' section contains two fields. The 'Product Description' field is highlighted with a yellow circle and shows a character count of '254 characters remaining' along with 'expand | clear' options. Below it is the 'Check Amount' field, which is currently empty.

4. In the "Check Amount" field, type the amount needing to be paid.
5. In the "Vendor Inv #" field, type the vendor's invoice number exactly as it is listed on the invoice. If there is no vendor invoice number, enter the date as yymmdd and amount, including cents, with no decimal. (i.e., 170104987).

The 'Vendor Inv #' field is highlighted with a yellow circle. Below it is the 'Invoice Date' field, which includes a date picker icon and the format 'mm/dd/yyyy'. At the bottom of the form is a large 'Notes' text area.

6. Enter the invoice date or select the date picker.

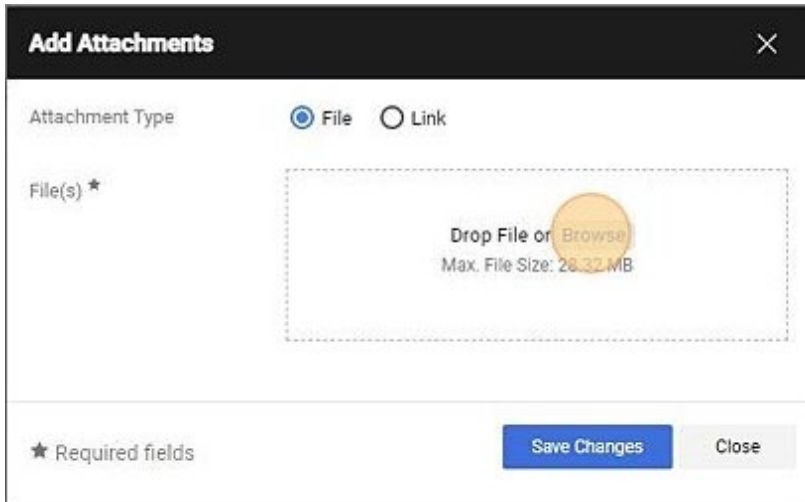
- 7. In the "Notes" field, type any applicable notes. This is not a required field and can be left blank.
- 8. Scroll down to the Attachments section and click "Add".

**Attachments**

Internal Attachments \*



- 9. Drag and drop the applicable file, such as an invoice, or click Browse to search your computer files. Once the file has been uploaded, click "Save Changes."



- 10. Click "Add And Go To Cart" at the top of the form.



- 11. You will be taken to your cart where you can complete the checkout process. See **Cart Checkout**.



# Mileage Reimbursement Form

1. Click "Mileage Reimbursement Form"



2. Review the Account Number Guide to determine which account code to use during checkout.

### **Use the following Account Number guide:**

<b><u>STAFF</u></b>	<b><u>FACULTY</u></b>	<b><u>BUDGET CENTER MANAGER</u></b>	<b><u>RECRUITMENT</u></b>
In-State Dev - 90010	In-State Dev - 90020	In-State Dev - 90025	In-State Dev - 90050
In-State Other - 90030	In-State Other - 90040	In-State Other - 90045	Out-State Dev - 90150
Out-State Dev - 90110	Out-State Dev - 90120	Out-State Dev - 90125	
Out-State Other - 90130	Out-State Other - 90140	Out-State Other - 90145	

3. Enter the name of the employee in the Vendor field and select them when they pop up.

#### Payee Info

Existing Vendor    Enter Manually

---

Enter Vendor \*   

4. If the employee is not listed, enter Vendor Unknown in the "Enter Vendor" field, then type the Employee Name and Employee S Number in the fields below.

Vendor \*        Vendor Unknown

Fulfillment Address    **BU Business/Work 1**  
Slcc  
4600 S Redwood Rd  
Salt Lake City, Utah 84123-3145 United States

Distribution Method \*  
The system will distribute purchase orders using the method(s) indicated below.  
 Check this box to customize order distribution information.

Employee Name   

Employee Number

5. Enter the Beginning date and Ending date.

### General Info

Beginning Mileage Date Claim Range \*

Ending Mileage Date Claim Range \*

6. If there is a single destination, enter it. If there are multiple destinations, enter "Multiple" or "See Attached". Enter the purpose for the travel. If multiple, enter "Multiple" or "See attached".

Destination \*

Purpose \*

7. Enter the total number of miles in the applicable Quantity field and hit tab. The total amount will automatically be calculated.

### Mileage Calculation

Description	Unit Price	Quantity	Ext. Price
2023 Mileage Calculation	0.655	<input type="text"/>	0.00
Total			0.00


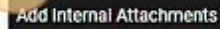
Meal Allowance/Other Expense

- 8. If there are other applicable expenses, such as parking, enter it in the meal allowance/other expense field.
- 9. If there were multiple destinations or trips, you must complete the [Mileage Reimbursement form](#) found on the [Travel website](#) and Add it as an Internal Attachment.

### Attachments

Attach copy of the meeting brochure, announcement, agenda, or program if applicable

Internal Attachments

10. Click "Add And Go To Cart" at the top of the form.



11. You will be taken to your cart where you can complete the checkout process. See **Cart Checkout**.

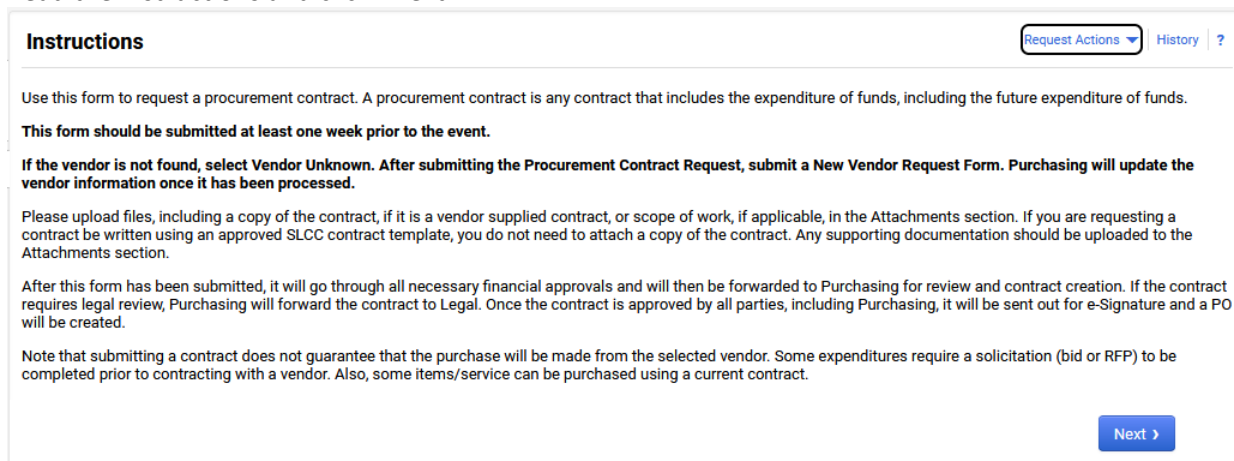
## Procurement Contract Request

A procurement Contract Request form should be entered whenever there is a contract to purchase something, except for those purchases allowed under the [Simple Service Contract Guidelines](#). A procurement contract includes any contract that includes the expenditure of funds. If the contract does not include the expenditure of funds, please enter the contract as a Non-Procurement Contract.

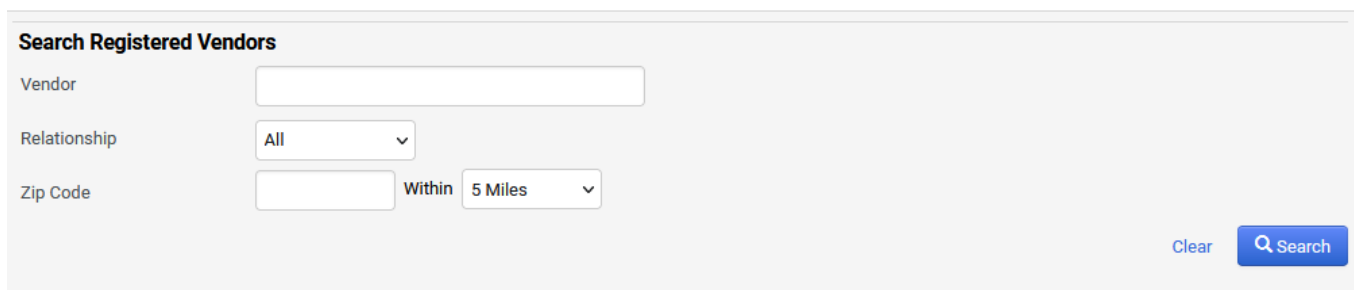
1. Click "Procurement Contract Request"



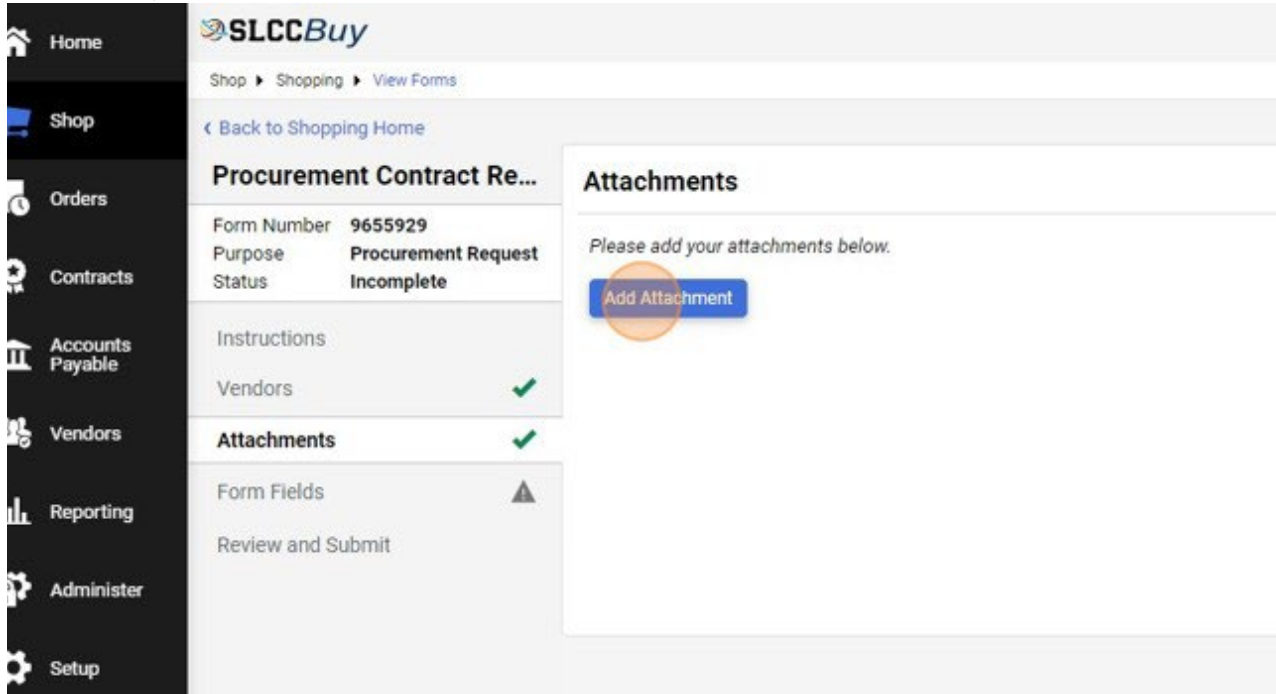
2. Read the Instructions and click "Next"



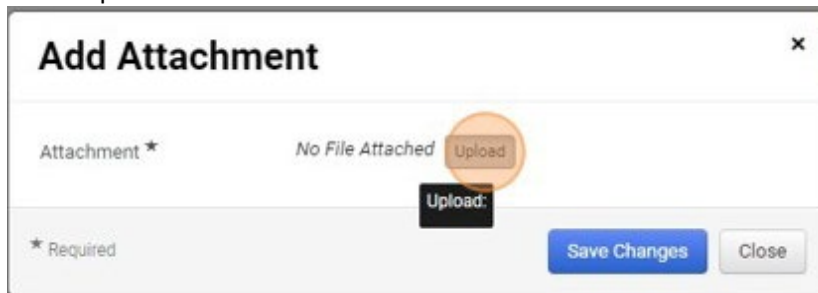
3. Search for the Vendor and select the appropriate address. Note that the system will automatically select the default address. If the vendor is not found, search for and select "Vendor Unknown" as the vendor. After submitting the request, you will need to complete the New Vendor Request Form to request the vendor be added to the system. Once the vendor is selected, click "Next".



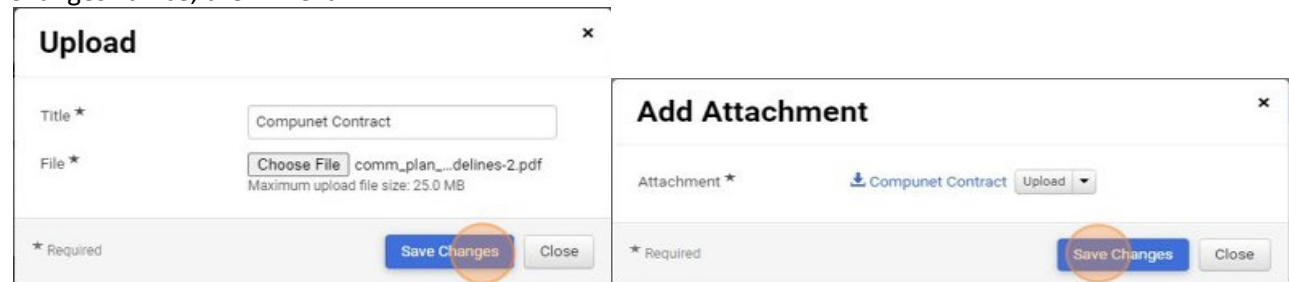
4. If you have an attachment, click on “Add Attachment”. Applicable attachments include: scope of work, if using an SLCC template; a copy of a vendor supplied contract, preferably in Word format; other documents supporting the contract, such as order forms.



5. Click “Upload”



6. Type a name for the attachment and click “Choose File” select the file you want to attach then click “Save Changes” twice, then “Next.”



7. Select a “Contract Type”. Some contract types will have additional questions that will need to be answered. Below is a list of choices and a short explanation of when to select each type.
  - a. Entertainment and Workshop
    - i. Any contract related to an entertainment or workshop event. If we are contracting with an individual, select Independent Contractor.
  - b. Goods and Services
    - i. Use when purchase equipment, supplies, or services that do not meet any other category.
  - c. Independent Contractor
    - i. This is for individuals performing a service. This should be used when we are paying an individual directly for services. If a company will be paid, select a different type, e.g.,

Professional Services or Goods and Services. Note that you will be required to attest that the individual meets the requirements of an independent contractor by completing a series of questions. Make sure to read the page and questions carefully.

- d. Licenses (not software)
  - i. This is for licensing agreements, such as music licensing. This does not include subscriptions or software.
- e. Maintenance/Service
  - i. This is for maintenance agreements for equipment. This does not include ongoing software maintenance.
- f. Professional Services
  - i. This is for companies performing professional services. Professional service means a service that requires a high degree of specialized knowledge and discretion in the performance of the service. See the [Purchasing Thresholds](#) document for more information. This should not be used if we are paying an individual (use Independent Contractor). If the service being performed does not meet the professional service definition, use Goods and Services.
- g. Rental/Leases
  - i. This should be used when renting or leasing equipment
- h. Software
  - i. This should be used for all software agreements, both initial purchases and renewals.
- i. Subscriptions
  - i. This should be used for subscriptions. This should not be used for software subscriptions. Subscriptions include access to online content libraries.
- j. Other
  - i. This should be used for any contract that does not meet any of the other categories.

The screenshot shows a web interface for a procurement request. On the left, there is a sidebar with a breadcrumb trail: 'Home > Procurement Request > 9655929'. Below this, there are sections for 'Conditions' (with a green checkmark), 'Attachments' (with a green checkmark), and 'Fields' (with a warning triangle). The main content area is titled 'Form Fields - Form Fields'. It has a 'On This Page' section with two links: 'General Contract Information (10)' and 'Contractor/Vendor Information (6)'. Below that is a section for 'General Contract Information' with a dropdown menu for 'Contract Type \*'. The dropdown menu is currently open, showing 'Goods and Services' selected. An orange circle highlights the dropdown arrow. Below the dropdown is a 'Contract Summary \*' field with a question mark icon and a '2000 characters remaining' indicator.

8. Enter a summary for the contract in the “Contract Summary” field. This summary should outline what the contract is for and allow a person who is unfamiliar with the summary to understand the purpose of the contract.

This screenshot shows a close-up of the 'General Contract Information' section. The 'Contract Type \*' dropdown menu is set to 'Goods and Services'. Below it is the 'Contract Summary \*' field, which is currently empty. A question mark icon is next to the field label. At the bottom of the field, it says '2000 characters remaining'.

9. If this contract will have only a single payment, select “Single Purchase” from the drop down. This includes purchasing equipment that has multiple payments, such as a down payment. If the contract includes multiple

payments over a period of time, including monthly or yearly payments, select “Term Contract.”

Is this a single purchase or a term (multi-payment) contract? \* ?

Is this a vendor-supplied contract? \* ?

Yes  No

- a. If you select Single Purchase, you will be prompted to enter a Unit Price. Please enter the total amount that will need to be paid. If this purchase includes a down payment and a final payment, including the total of both payments. You will also be prompted to enter a Product Description. This will be printed on the Purchase Order that will be sent to the vendor along with the completed contract. Please enter a short description of what is being purchased.

Is this a single purchase or a term (multi-payment) contract? \* ?

Single Purchase Cost

Unit Price	<input type="text"/>	USD	Quantity	1	Total	0.00 USD
Product Description	<input type="text"/>					

1000 characters remaining

- b. If you select Term Contract, you will be prompted to enter the Total Contract Price. Please enter the total amount that will be paid over the initial contract period. For example, if the initial period is 3 years, enter the total amount that will be paid over the three-year period. Do not include renewal periods.

Under the Total Contract Price field, you will see a PO Amount section prompting for a Unit Price and Product Description. Enter the amount that will need to be encumbered on the initial PO in the Unit Price field. For example, for a new software subscription that has an initial term of three years and implementation cost, you should enter the total amount of the year 1 plus the implementation cost. In the Product Description field, enter a simple explanation such as, “Software subscription for 07/01/2023-06/30/2024 and initial implementation.”

You will also be prompted to enter a start date and end date. These dates should cover the entire initial contract period. For example, for a three year contract the dates may be 07/01/2023 and 06/30/2026.

Term Contract

Total Contract Price \* ?

PO Amount ?

Unit Price	<input type="text"/>	USD	Quantity	1	Total	0.00 USD
------------	----------------------	-----	----------	---	-------	----------

Product Description

1000 characters remaining

Start Date \*

mm/dd/yyyy

End Date \*

mm/dd/yyyy

10. If the vendor provided the contract, select “Yes” to the next question. You will be prompted to acknowledge that you have uploaded a copy of the vendor-supplied contract. Note that a Word version of the contract is preferred. If you were provided with a pdf, please request a Word version from the vendor.

Is this a vendor-supplied contract? \* ?

Yes  No

Upload an unsigned copy of the contract/agreement to the Attachments section

I have uploaded a copy of the contract.

- a. If the vendor did not supply a contract, such as for an independent contractor agreement, we will utilize an SLCC standard template. Select “No” to the question and continue to the Contractor/Vendor Information section.

11. Enter the name, phone number, and email address of the individual who is the main contact for the vendor.

▼ Contractor/Vendor Information

Vendor Contact Name (Person) \*

John Smith

Vendor Contact Phone Number


Vendor Contact Email Address \*

12. If the individual entered will sign the contract on behalf of the vendor, click “Yes” to the next question. If a different individual will sign the contract, click “No” and enter the name and email address of the individual who will sign for the vendor.

Will the individual listed above be the signatory for this contract? \*

Yes  No

13. Click “Next”.

14. If the contract requires additional information based on your answers to the previous questions, an additional page or pages of questions will be displayed. Review each question and provide an answer. Questions marked with an \* are required. If you need additional information regarding what information should be entered, click the help button . When you have finished answering all questions on the additional pages, click “Next.”

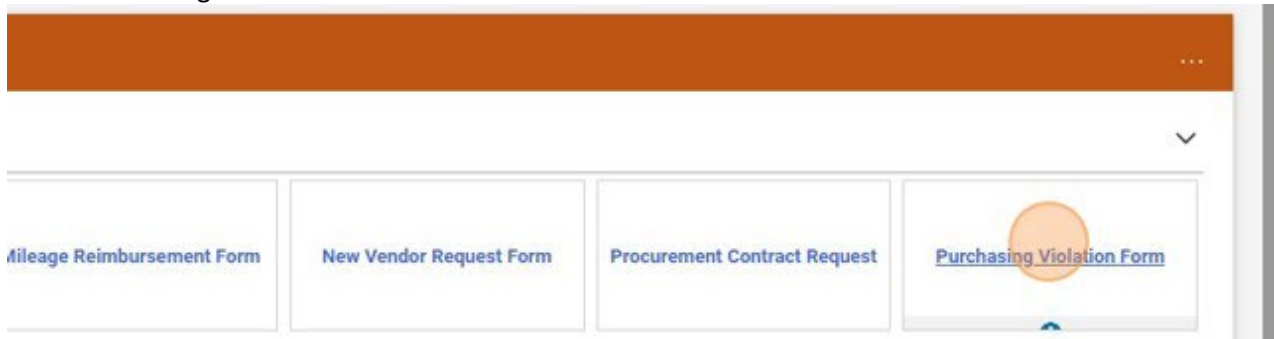
15. When you have reached the Review and Submit section, click the “Add and Go to Cart” button. You will be taken to your cart where you can complete the checkout process. See **Cart Checkout**.



## Purchasing Violation Form

This form should be completed whenever an order has been placed in violation of Purchasing policies and rules. See the [Purchasing Violation Guidelines](#) for more information.

1. Click "Purchasing Violation Form".



2. Enter the Vendor.

A screenshot of the "Payee Information" section of the form. It features a horizontal bar with "Existing Vendor" and "Enter Manually" options. Below this is a search field labeled "Enter Vendor \*" with a "Select Vendor" button and a magnifying glass icon. An orange circle highlights the "Select Vendor" button.

3. Enter the Vendor Invoice Number, Invoice Date, Invoice Amount, and Product Description.

A screenshot of the form fields for Vendor Invoice Number, Invoice Date, Invoice Amount, and Product Description. The "Vendor Inv # \*" field contains "123abc". The "Invoice Date \*" field contains "7/3/2023" and has a calendar icon. The "Invoice Amount \*" field contains "3200". The "Product Description \*" field is empty and has a character count of "254 characters remaining" and "expand | clear" options. An orange circle highlights the "Product Description" field.

4. Provide an explanation for not following policy by answering the two questions under Violation Information. These questions should be answered by the individual who violated policy, even if they are not completing the form. Include the name of the individual who violated policy. Note that this form will be reviewed by the head of the department and the VP/Provost over the area.

**Violation Information**

Explain why the order was placed without following the proper procedure

240 characters remaining

[expand](#) | [clear](#)

Describe the corrective action that will be taken to prevent the problem from recurring

150 characters remaining

[expand](#) | [clear](#)

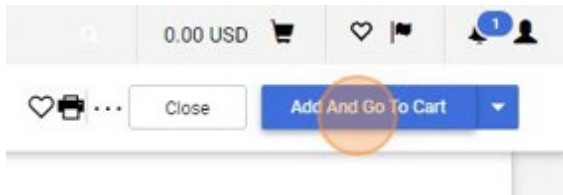
- 5. Attach a copy of the invoice and/or other documents related to this transaction by clicking “Add” next to Internal Attachments.

**Attachments**

Internal Attachments \*



- 6. Click “Add and go to Cart”. You will be taken to your cart where you can complete the checkout process. See **Cart Checkout**.



# Procurement Request / General Forms

## PO Invoice

1. Click "PO Invoice"



2. Review the instructions and click "Next."

**Instructions** Request Actions History ?

This form is used to submit invoices to Accounts Payable for orders that have a Purchase Order. This form should not be used to submit Payment Requests. Please answer the questions on the following page, upload a copy of the invoice, and submit to Accounts Payable. This form should also be used to authorize payments from a contract that do not have an invoice.

Next >

3. If this payment is a contract payment for an individual where no invoice will be provided, click "Yes". If an invoice was provided, click "No" and go to Step 10. (The questions are different based on the answer to this question. Steps 4-9 apply to "Yes" and Steps 10-20 apply to "No".

<b>PO Invoice</b>	<b>Questions - Invoice Information</b>
Form Number <b>9356497</b>	
Purpose <b>Generic Request</b>	
Status <b>Incomplete</b>	
Instructions	
<b>Questions</b> <span>▲</span>	<b>Payment Type</b>
Review and Submit	Is this a contract payment for an individual, like a speaker or entertainer, where no
Discussion	<input checked="" type="radio"/> Yes <input type="radio"/> No

"Yes"

4. Enter the amount that needs to be paid in the Invoice Amount field.

Payment Type

Is this a contract payment for an individual, like a speaker or entertainer, where no invoice v

Yes  No

Contract Payment Information

Invoice Amount \*

5. Enter the date the payment should be made by typing it into the Payment Date field or using the date picker.

Contract Payment Information

Invoice Amount \*

Payment Date \* ⓘ

  
mm/dd/yyyy

6. Select the reason for the Payment from the dropdown box. Reasons include: Down Payment, Progress Payment, Other Payment, Final Payment.

Payment Date \* ⓘ

  
mm/dd/yyyy

What is this payment for? \*

7. Enter the PO number in the "Purchase Order Number" field. (Hint. The PO Number will start with a "P".)

What is this payment for? \*

Purchase Order Number \* ⓘ

8. Enter any applicable notes regarding this payment.

Purchase Order Number \* ⓘ

P2312345

Notes for Payment

2000 characters remaining

9. If the type of payment is “Final Payment”, verify that all services related to this payment that are outlined in the contract have been completed by checking the "Confirmed" box. And enter the date the work was completed. If the services have not been completed, we cannot make payment. Do not submit the form until the services have been rendered.

All services outlined in the contract have been completed. \*

Confirmed

Date the work was completed \*

mm/dd/yyyy

"No"

10. Enter the Vendor Invoice Number.

Payment Type

Is this a contract payment for an individual, like a speaker or entertainer, where no i

Yes  No

Invoice Information

Invoice Number

11. Upload a copy of the invoice by clicking the Upload button.

The screenshot shows a form titled "Invoice Information". Under the heading "Invoice Information", there is a field for "Invoice Number" containing the text "abc123". Below this is a section for uploading an invoice, labeled "Upload a copy of the invoice (pdf preferred). \*". It shows a status of "No File Attached" with an "Upload" button. A tooltip is visible over the "Upload" button with the text "Uploaded attachment will be copied to the invoice.".

12. Name the file in the "Title" field and click "Choose File." Select the appropriate file from your computer. And click "Save Changes."

The screenshot shows a dialog box titled "Upload". It has a "Close" button in the top right corner. There are two required fields: "Title \*" and "File \*". The "Title" field is empty. The "File" field has a "Choose File" button and the text "No file chosen" and "Maximum upload file size: 25.0 MB". At the bottom, there is a legend for the asterisk, and two buttons: "Save Changes" and "Close".

13. Enter the Purchase Order Number.

The screenshot shows the "Upload a copy of the invoice" section with a dropdown menu set to "invoice" and an "Upload" button. Below this is the "Purchase Order Number \*" field, which is currently empty. A tooltip is visible over the field with the text "Uploaded attachment will be copied to the invoice.".

14. Enter any applicable notes regarding the invoice.

The screenshot shows the "Purchase Order Number \*" field containing the text "P2312345". Below it is the "Notes for Invoice" section, which is currently empty. A tooltip is visible over the field with the text "2000 characters remaining".

15. If all of the items/services listed on the invoice have been received, click "Yes". If they have not, click "No".

▼ **Receiving Information**

Have all items/services listed on the attached invoice been received/rendered? \*

Yes  No

16. Enter the name of the individual who received the goods/services. Enter the date the items were received. If they were received on multiple dates, select the most recent date.

▼ **Receiving Information**

Have all items/services listed on the attached invoice been received/rendered? \* ⓘ

Yes  No

Name of individual who received the goods/services. \* ⓘ

When were the items received? \* ⓘ

ⓘ

mm/dd/yyyy

17. Enter any applicable notes regarding receiving. If you selected "No" to the receiving question above, list the items that have been received, including qtys.

When were the items received? \* ⓘ

ⓘ

mm/dd/yyyy

Notes for Receiving

2000 characters remaining

## Complete and Submit

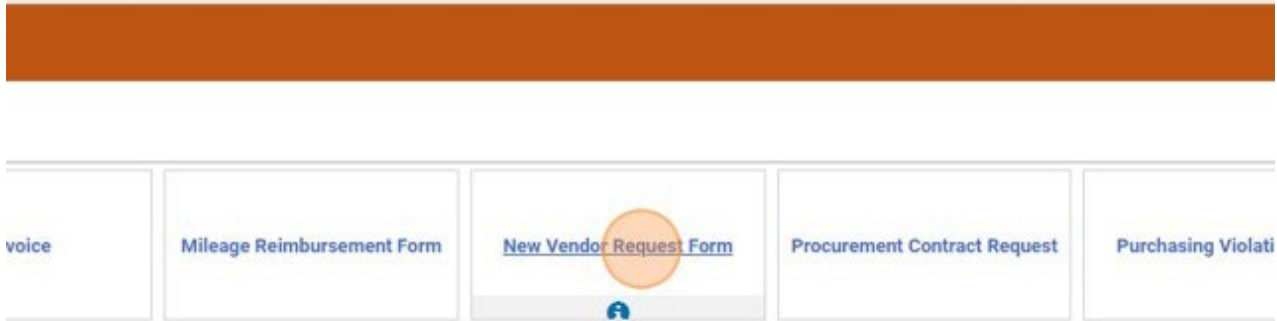
18. Click "Next"
19. Click "Submit"
20. Click "Yes"



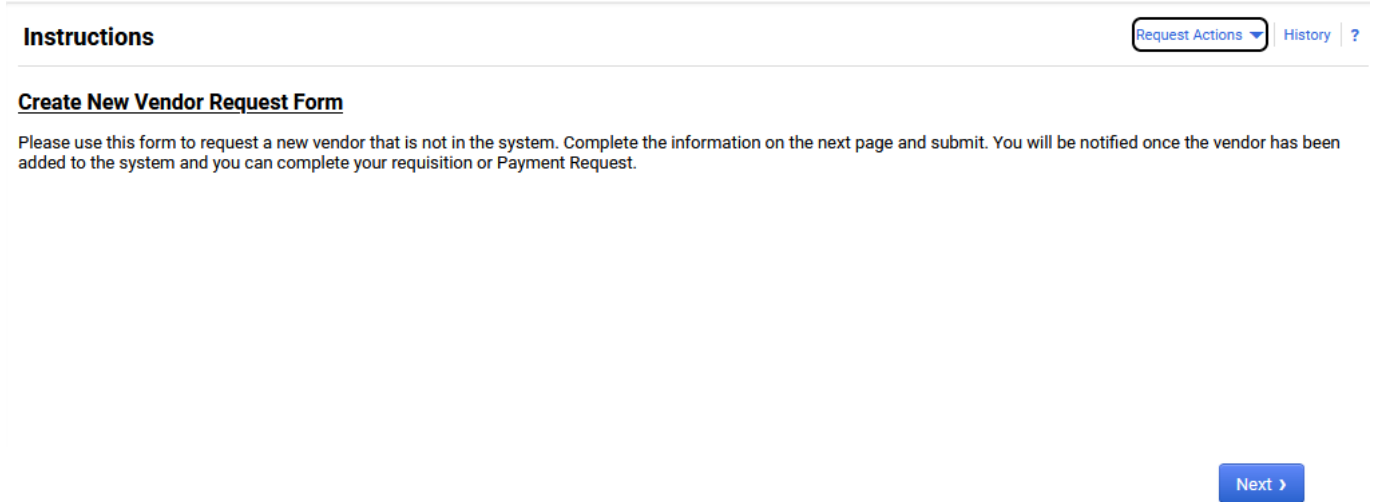


## New Vendor Request Form

1. Click the “New Vendor Request Form”



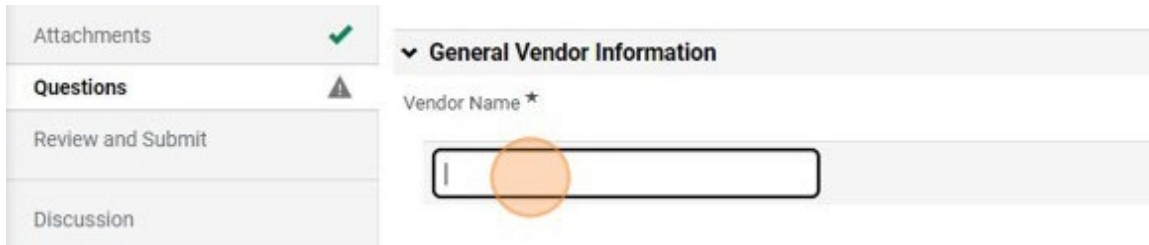
2. Review the instructions and Click “Next”.



3. If you have a completed Vendor Registration Form, a copy of a vendor’s W9, or other documents, attach them in the Attachments section. When you are done attaching document, click “Next”



4. Enter the Vendor Name.



5. If the individual is an employee, student, or other individual who has already been issued an S number, click “Yes” and enter the S Number.

Does this vendor already have an S number (e.g., Student or Employee)? \*

Yes  No

S Number \*

6. For all other requests, click “No”. A link to the Vendor Registration Form will be displayed. Departments can provide the Vendor Registration Form to vendors for completion and then attach them to this form.

Does this vendor already have an S number (e.g., Student or Employee)? \*

Yes  No

All new vendors must complete the Vendor Registration Form. Note this form is new as of 1/13

- [Vendor Registration Form](#)
- [Vendor Registration Form - Spanish \(Formulario de registro de proveedores\)](#)

- a. If you have a copy of the completed Vendor Registration Form, click “Yes”. You will need to confirm that you have attached a copy in the Attachment section.

Do you have a copy of the completed Vendor Registration Form? \*

Yes  No

- b. If you would like Purchasing and Accounts Payable to obtain the form, click “No”. Complete the vendor contact information. Purchasing and Accounts Payable will use this information to contact the vendor to obtain the necessary information.

7. Select the purpose for needing the vendor created.
- Company Payment (non-individual)
  - Independent Contractor
  - Reimbursement
  - Stipend/Award/Gift
  - Other (explain in Notes field)

▼ Notes

Purpose for vendor \*

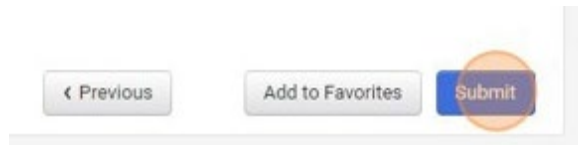
8. Enter any notes related to this request and click “Next”

Notes



A rectangular text input field with a light gray border. Inside the field, there is a large orange circle. Below the field, the text "2000 characters remaining" is displayed.

9. Confirm that there are green checkmarks under Progress and click Submit and Yes. The form will be forwarded to Purchasing and Accounts Payable for processing.

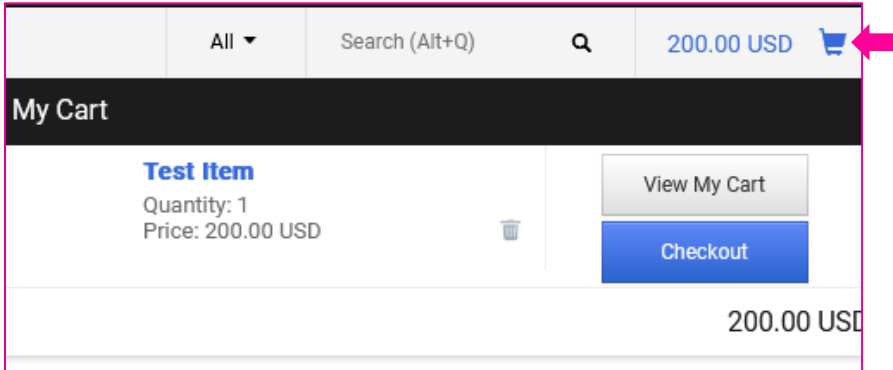


A horizontal row of three buttons. From left to right: a gray button with a left-pointing arrow and the text "Previous"; a gray button with the text "Add to Favorites"; and a blue button with the text "Submit". An orange circle is overlaid on the "Submit" button.

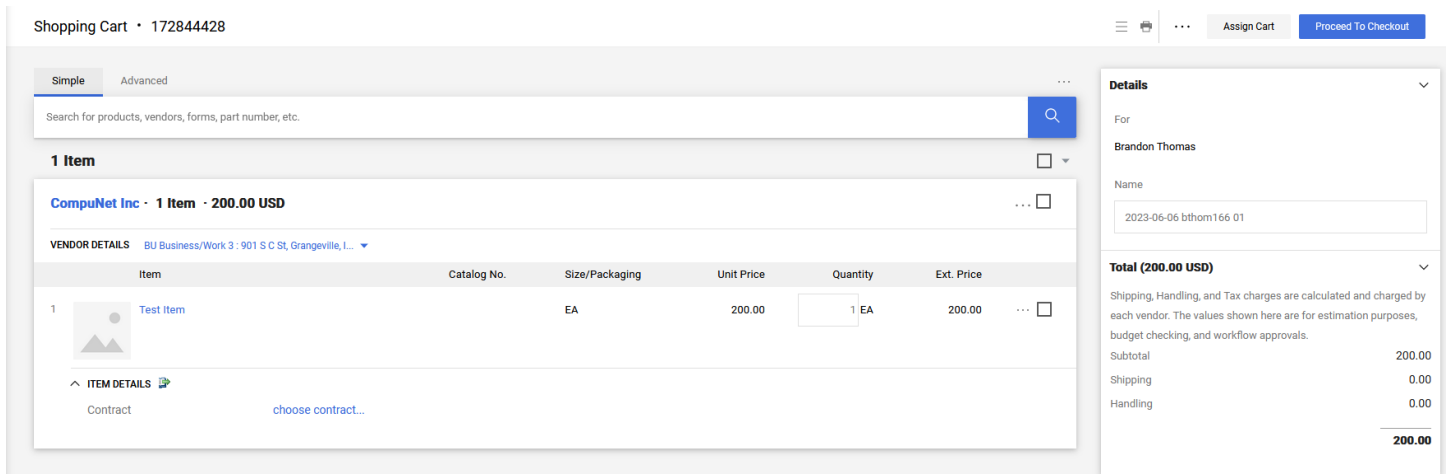
# Cart Checkout

**Note:** You cannot mix forms in the same requisition. You can add multiple forms of the same type to the same requisition. However, it is recommended that you submit a separate requisition for each vendor/form.

Once all of your items have been added to your cart, you can proceed to check out. Click on the cart on the Action Bar at the top of the screen. You can select **View My Cart** or **Checkout**.



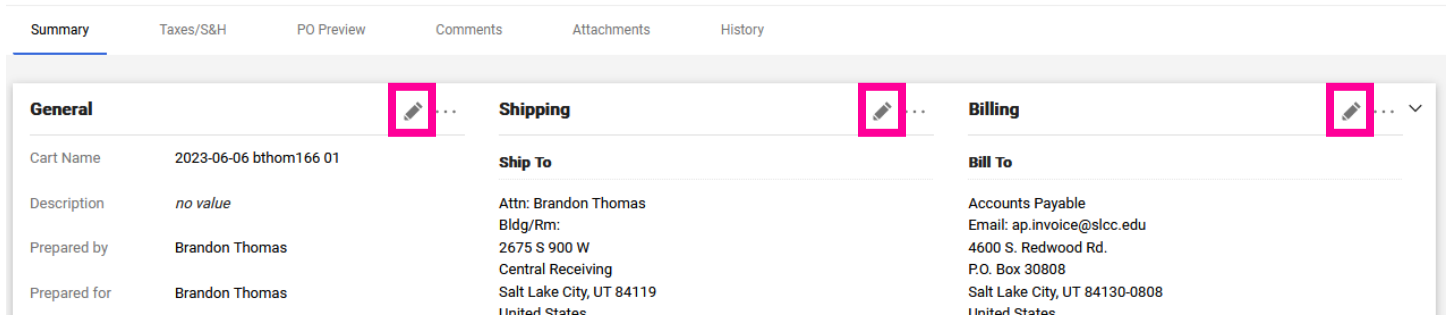
If you select View My Cart, you will be able to review the items in your cart before proceeding to checkout.



After proceeding to checkout, you will need to enter any applicable notes and add accounting codes.

The checkout screen is broken into sections. You can edit fields in the different sections by clicking on the pencil icon in the upper right corner of that section. Below are some of the fields you will encounter and may need to enter information.

Requisition • 172844428



## General



- Cart Name – You can name your cart if you would like. This can be used to search for carts. The system will automatically assign a cart name, “Date username cart number”.
- Description – You can use this field to write notes about this order. These notes are internal only and will not be sent to a vendor.
- Prepared for – You can enter the name of the person for whom this order is entered. This is not required. The individual listed in this field will have access to the requisition.
- New Year PO – This box is only available at the end of a fiscal year. It is used to indicate that the order should be held until July.
- Old Year – This box is only available in July and is used to mark Payment Requests as old year. This box should not be used for non-catalog or punch-out orders.

## Shipping

- Attn – Enter the name of the individual who should receive the items. This will default to your name.
- Bldg/Rm – Enter the building and room number for the delivery. This will be used by Central Receiving to deliver the items.

## Billing

- Credit Card Info – If you are using a p-card for this order, select your credit card. If a credit card should be removed, it can be removed in this section. Note that a p-card can only be used for punch-out vendors listed under Punch-Out Vendor-P-card. When using a P-Card **DO NOT** enter an Index and Account. A p-card cannot be used for non-catalog item requisitions or form requisitions.

Index and Account Codes		Internal Notes and Attachments		External Notes and Attachments	
Index	Account	Internal Note	no value	Note to all Vendors	no value
no value	no value	Internal Attachments	<a href="#">Add</a>	Attachments for all vendors	<a href="#">Add</a>
 Empty	 Empty				

## Index and Account Codes

- Index – Select the Index number from which funds will be used.
- Account – Enter the Account number for this transaction. You can search for the account number either by number or description.
- If you are using a P-Card **DO NOT** enter an Index and Account. You will allocate the transaction in Chrome River when doing your p-card expense report.
- Note that the Index and Account entered will be used for all lines.
  - If the total amount needs to be split among multiple Indexes, you can add multiple Index-Account strings and split by percent or amount. To add additional accounting strings, click the + button when on the enter codes screen. You must have Banner Access to all Indexes entered in order to submit the requisition. If you do not, you will need to assign the cart to a member of Purchasing and Accounts Payable to submit on your behalf.
  - If a specific line item needs a different accounting string (Index and/or Account) you can enter a different string on the line item. Scroll to the line item. Click on the 3 dots (...) and select Index and Account Codes. Change the applicable code(s) and click save. You will see the new accounting string under the line item. Accounting Codes entered on a line item will override the accounting entered on

the header for that line only.

### Internal Notes and Attachments

- Internal Note – Enter notes for internal use. This includes notes to approvers or buyers. These notes will not be sent to a vendor.
- Internal Attachments – Upload quotes, supplemental documentation, email chains, etc. These documents will be viewed internally only.

### External Notes and Attachments

- Note to all Vendors – Enter notes to be sent to vendors with the PO. Note that some punch-out vendors are set to not receive these notes as their system cannot handle them. The system will display a warning if this is the case.
- Attachments for all vendors – Attach vendor quotes or other documentation that needs to be sent to the vendor with the Purchase Order. Note that most punch-out vendors are set to not receive external attachments.

Once you have updated all of the applicable fields, added accounting codes, and uploaded documentation, you can submit the requisition for approval by clicking “**Submit Requisition.**” This step will submit the requisition into workflow.

**NOTE:** A user must have Banner Finance permissions for the Index(es) selected when submitting the requisition. If the user does not have this permission, the requisition will be returned. If a user does not have permission, they will need to click “Assign Cart” to assign the cart to a user with the needed permissions. See Assign Cart for more information.

Requisition • 172844428

Assign Cart Submit Requisition

General	Shipping	Billing
Cart Name: 2023-06-06 bthom166 01	Ship To: Attn: Brandon Thomas, Bldg/Rm: 2675 S 900 W, Central Receiving, Salt Lake City, UT 84119, United States	Bill To: Accounts Payable, Email: ap.invoice@slcc.edu, 4600 S. Redwood Rd., P.O. Box 30808, Salt Lake City, UT 84130-0808, United States
Description: no value		
Prepared by: Brandon Thomas		
Prepared for: Brandon Thomas		
Department: Purchasing Office (Purchasing Office)		
Requested Delivery Date: no value		Credit Card Info: No credit card has been assigned.

**Draft**

Total (200.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	200.00
Shipping	0.00
Handling	0.00
	<b>200.00</b>

Once the Requisition is submitted, you can click on the requisition number to view the status of the requisition.

Simple Advanced

Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order

Browse: Suppliers | Categories | Contracts

Search for products, suppliers, forms, part number, etc.

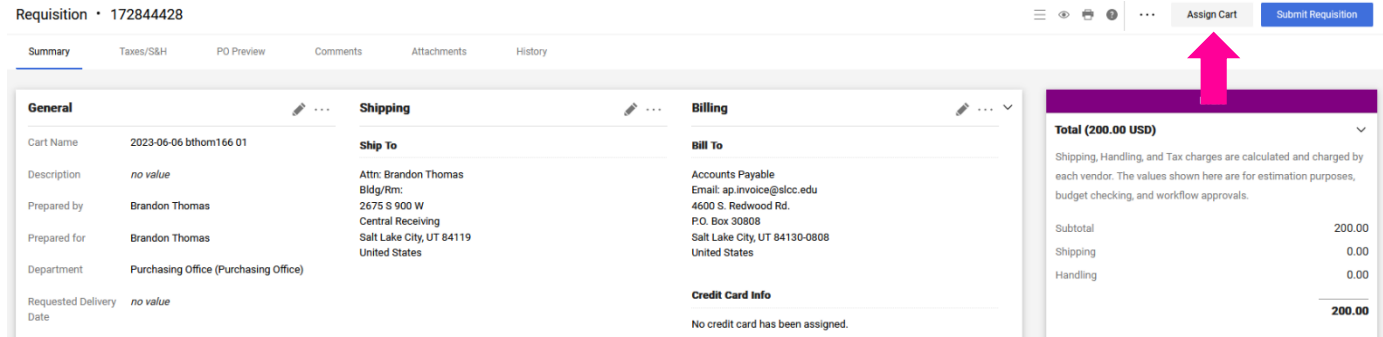
Requisition 3621049 Submitted

Summary	Options
Requisition number: 3621049	Print
Requisition status: Pending	Recent orders
Cart name: 2022-10-10 V00571250 06	Return to your home page
Requisition date: 10/10/2022	
Requisition total: 997.67 USD	
Number of line items: 1	

# Assign Cart

If you do not have Banner Finance permissions to the Index(es) entered, you will need to Assign the cart to a user that has the needed permission, usually an administrative assistant.

On the View Cart or Checkout screen, click “Assign Cart”



Requisition • 172844428

Summary Taxes/SH PO Preview Comments Attachments History

General	Shipping	Billing
<b>Cart Name</b> 2023-06-06 bthom166 01	<b>Ship To</b>	<b>Bill To</b>
<b>Description</b> no value	Att: Brandon Thomas Bldg/Rm: 2675 S 900 W Central Receiving Salt Lake City, UT 84119 United States	Accounts Payable Email: ap.invoice@slcc.edu 4600 S. Redwood Rd. P.O. Box 30808 Salt Lake City, UT 84130-0808 United States
<b>Prepared by</b> Brandon Thomas		
<b>Prepared for</b> Brandon Thomas		
<b>Department</b> Purchasing Office (Purchasing Office)		
<b>Requested Delivery Date</b> no value		<b>Credit Card Info</b> No credit card has been assigned.

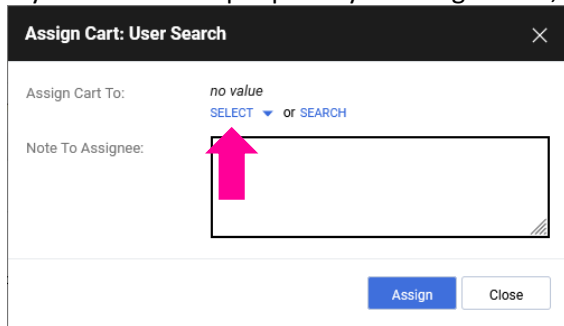
**Total (200.00 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each vendor. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	200.00
Shipping	0.00
Handling	0.00
	<b>200.00</b>

If a default Assignee has been entered on your profile, they will automatically be selected.

If you have added people to your assignee list, you will see a select drop down. Click “SELECT” and select the individual.



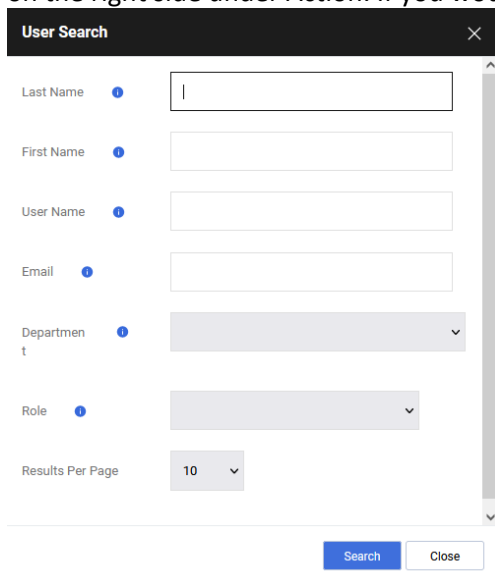
**Assign Cart: User Search**

Assign Cart To: no value  
SELECT or SEARCH

Note To Assignee:

Assign Close

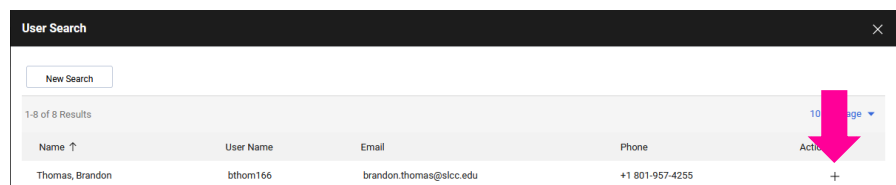
If you need to select a person not on your list, click the Search link. Search for the individual. To select them, click the + on the right side under Action. If you would like to add the person to your list, check the Add to Profile box.



**User Search**

Last Name |  
First Name  
User Name  
Email  
Department  
Role  
Results Per Page: 10

Search Close



**User Search**

New Search

1-8 of 8 Results

Name ↑	User Name	Email	Phone	Action
Thomas, Brandon	bthom166	brandon.thomas@slcc.edu	+1 801-957-4255	+

If the person you need cannot be found, send an email to Purchasing and Accounts Payable and they will add them to your profile.

If you are assigning the cart to Purchasing & A/P, make sure you have entered the Index/Account on the checkout page before assigning the cart.

Enter a note to the Assignee and click Assign.

**Assign Cart: User Search** [X]

Assign Cart To: *no value*  
SELECT ▾ or SEARCH

Note To Assignee: [Text Input Field]

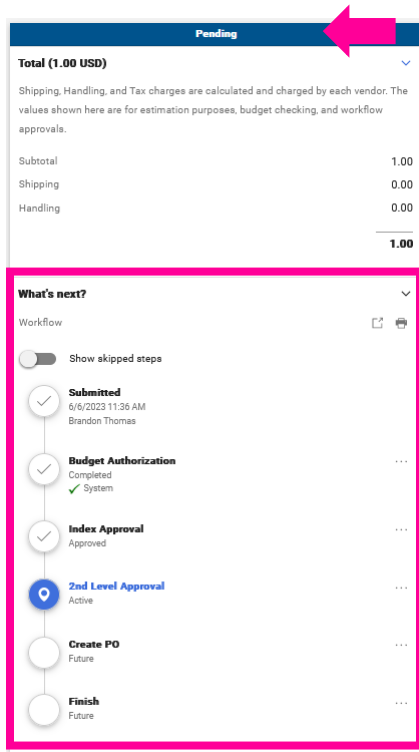
[Assign] [Close]



# Requisition Workflow - Status

Once a requisition has been submitted, you can view the status. See **Searching for a Document**.

The status and workflow is displayed on the right.



The status bar will be a different color based on the status: purple for draft, blue for pending, and green for complete.

Different workflow steps will be displayed based on a number of factors. You can click on a step to see who the approver will be. Some steps may list multiple potential approvers. Below is a list of workflow steps that may appear.

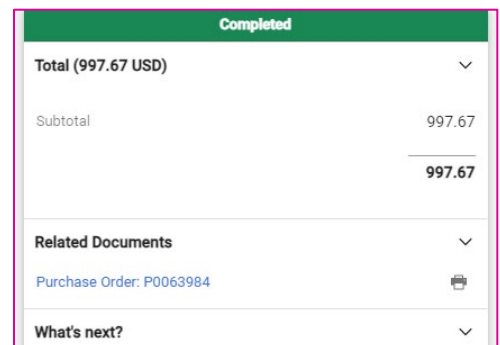
- Budget Authorization – This is an automated step. SLCCBuy checks with Banner to ensure the submitter is authorized to use the Index listed and that there is sufficient budget for the transaction.
- Pre-approval – This step may appear if the item being purchased requires review before it is sent to the BCM. This occurs for Independent Contractors.
- Index Approval – This step is for budget center manager (BCM) approval.
- 2<sup>nd</sup> Level Approval – This step is for the BCM’s supervisor. This applies to any requisition where the BCM is the vendor (reimbursement) or the BCM is the submitter as a person cannot submit and approve the same document.
- Grant Approval – This step appears if the Index being used is a grant index. A Grant Accountant will review and approve.
- Account Number Approval – This step appears for certain account codes for additional approval, such as IT for computer software and hardware orders.
- 25k Approval – This step appears if the requisition exceeds \$25,000 or if it contains a purchasing violation form. These requisitions require V.P./Provost approval.

- 50k Approval – This step appears if the requisition exceeds \$50,000. These requisitions require approval from the V.P. of Administration and Finance.
- 100k Approval – This step appears if the requisition exceeds \$100,000. These requisitions require Presidential approval.
- Purchasing Approval – This step appears if the requisition exceeds the small dollar purchase threshold. A buyer will review the requisition, perform any needed procurement process, and award a PO or contract.
- CapEx Notification – This step appears if capital equipment is being ordered. The Fixed Asset Accountant will review and approve.
- Purchasing Director Approval – This step appears if the requisition requires the approval of the Director of Purchasing and Accounts Payable.
- Create PO – This is an automated step that creates the purchase order.

Once the requisition has been completed, SLCCBuy will populate a PO number and the status bar will turn green.

You can access the PO directly from the **Related Documents** section of the status menu by clicking on the number.

**NOTE:** You will see a temporary placeholder PO number while SLCCBuy receives a number from Banner. – Banner PO numbers begin with a P. (This does not apply to payment requests, mileage reimbursements, or purchasing violations. These do not encumber funds.)



# Purchase Order Workflow - Status

Once a requisition has been completed, you can view the status of the Purchase Order (PO).

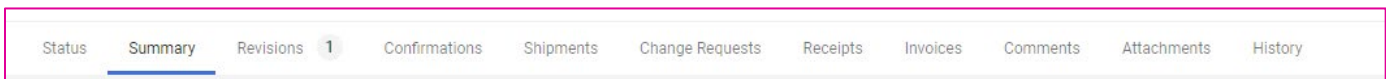
You can find recent Purchase Orders by using the global left-hand menu. Go to **Orders > My Orders > My Purchase Orders** to see a recent list of orders you own. You can also use document search to find a purchase order.

**NOTE:** You will see a temporary placeholder PO number while SLCCBuy receives a number from Banner. – Banner PO numbers begin with a P. (This does not apply to payment requests, mileage reimbursements, or purchasing violations. These do not encumber funds.)

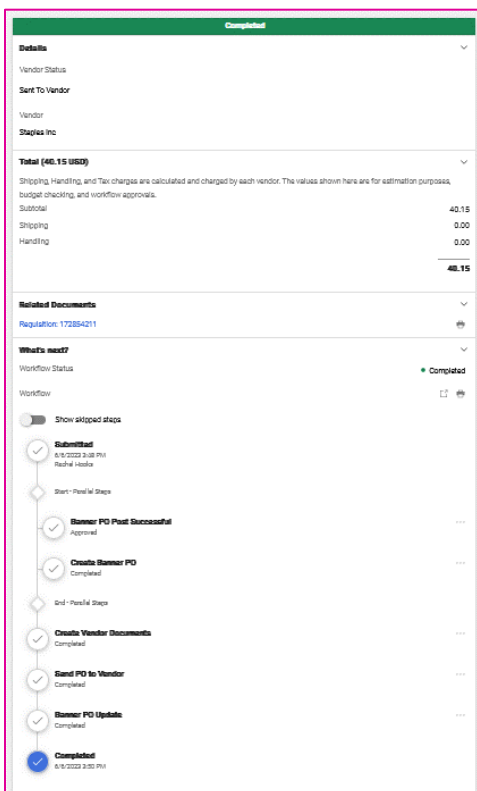
On the Purchase Order screen, you will see the status bar to the right with the next steps, much like requisitions. Across the top, you will see a ribbon of options such as Status, Summary, Revisions, etc.

You can view all of the receipts (receiving documents) and invoices that have been entered.

Purchase Order Ribbon example:



Some punch-out vendors provide order confirmations and/or advanced shipment notifications in SLCCBuy in addition to sending an email. You can view these on the Confirmations and Shipments tabs respectively.



(RIGHT) Here we can see that the Purchase Order has been completed and sent to the vendor.

# Invoice Workflow - Status

Payment Requests and Mileage Reimbursements automatically generate an invoice which is routed to Accounts Payable for processing. Invoices that are paid against POs are either sent directly into SLCCBuy by the vendor, if a punch-out, or manually entered by Accounts Payable. Once the invoice has been generated, you can view the status.

You can find Invoices using the global left-hand menu. Go to **Orders > My Orders > My Invoices** to see a recent list of invoices for POs you own. You can also use document search to find a document. Note that you can also find the invoices by looking in the Related Document section of a requisition or purchase order or the Invoices tab on the Purchase Order.

The screenshot displays the invoice details for Edvotek Inc. Invoice # B0044954. The status is 'Paid'. The invoice date is 6/30/2023, and the due date is also 6/30/2023. The total amount is 715.95 USD. The 'What's next?' section shows a workflow with the following steps:

- Submitted: 7/17/2023 1:18 PM (Lisa Larson)
- Matching Exceptions: Approved (Brandon Thomas)
- OK to Pay: Completed
- Auto-Close-PO: Completed
- Completed: 7/17/2023 5:58 PM

On the Invoice screen, you will see the status bar to the right with the next steps, much like requisitions and purchase orders. Across the top, you will see a ribbon of options such as Summary, Matching, Vendor Messages, Comments, etc.

Below is a list of workflow steps that may appear.

- **Special Approvals** – This step is used for Accounts Payable to approve Payment Requests, Mileage Reimbursements, and Purchasing Violations.
- **Non PO Approval** – This step will only appear on invoices that were created without a Purchase Order or Requisition. These invoices are created when payments need to be reissued, there are technical issues, or other exceptional circumstances.
- **Hold for Receiving** – This is an automated step. Invoices for POs that require receiving (Most regular POs require receiving. Standing POs do not.). The invoice will remain in the step until receiving has been entered or it is 10 days before the Invoice due date.
- **Matching Exceptions** – Invoices that do not match the amount or qty listed on a PO AND those invoices that have items that have not been received in the system go to this step for review. Purchasing and Accounts Payable review these invoices and reach out to the department and the vendor to ensure receipt. Once receipt is confirmed, receiving is entered and the invoice is approved.
- **OK to Pay, Auto-Close-PO, and Completed** are all automated steps that prepare the invoice for export to Banner for payment.

Once an invoice has completed workflow, it is exported to Banner and the Pay status is updated to “Payable”. The invoice will be held in Banner until the due date. On the due date, the payment will be made to the vendor using the payment method they have selected. After payment is made, the Payment Information section will be updated with the Payment Method, Payment/Check Number, and Check Date.

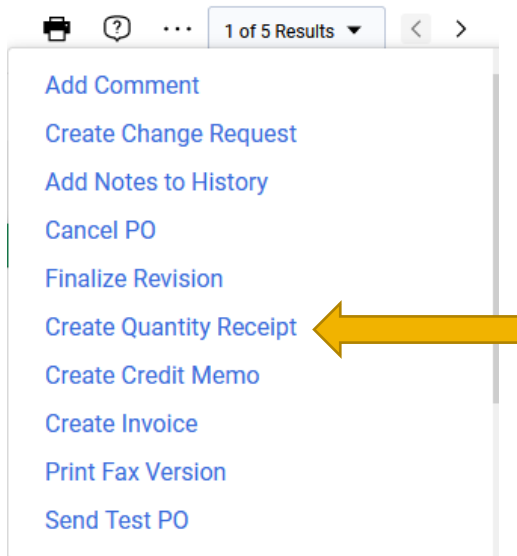
Vendors can be paid with one of three options.

- Check – Payment by paper check mailed to their address.
- ACH – Payment by direct deposit to their bank account.
- ComData – Payment by MasterCard. A single use credit card is sent the vendor’s Accounts Receivable department to process the payment.

# Entering Receiving

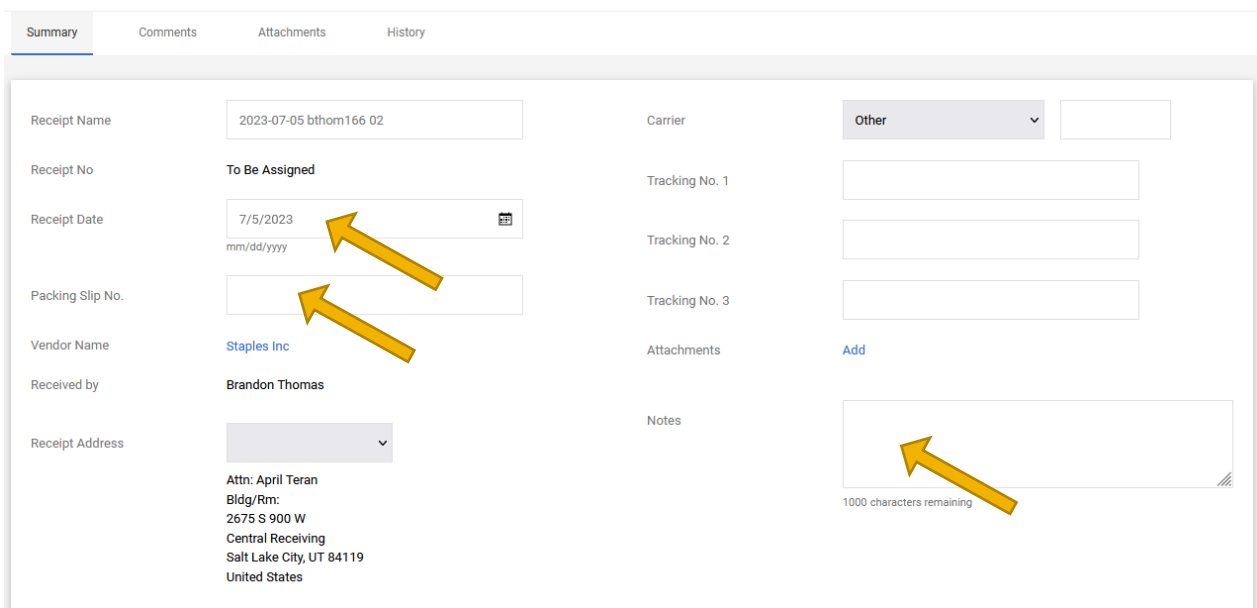
For items that are not delivered through Central Receiving and for services that are rendered, departments can enter receiving by creating a receipt. Remember that when you create a receipt, you are attesting to the fact the item is here or the service has been rendered.

1. Access the PO that is associated with the goods or services being received. It is associated with your requisition. You can do this either through Direct Access using the search bar at the top of the screen or by using Document Search.
2. Open the purchase order by selecting the **PO number**.
3. From the ... drop-down menu, select **Create Quantity Receipt**.



4. The receipt will be automatically populated with the PO information, including the remaining number of items to be received.
5. Add any additional information, such as **Receipt Date** (date the items were received/services were completed), **Packing Slip number** (if applicable), or **Notes**.

Quantity Receipt • 5/5787

A screenshot of a receipt entry form. The form is divided into two columns. The left column contains fields for: Receipt Name (2023-07-05 bthom166 02), Receipt No (To Be Assigned), Receipt Date (7/5/2023), Packing Slip No., Vendor Name (Staples Inc), Received by (Brandon Thomas), and Receipt Address (Attn: April Teran, Bldg/Rm: 2675 S 900 W, Central Receiving, Salt Lake City, UT 84119, United States). The right column contains: Carrier (Other), Tracking No. 1, Tracking No. 2, Tracking No. 3, Attachments (Add), and Notes (1000 characters remaining). Yellow arrows point to the Receipt Date, Packing Slip No., and Notes fields.

- Scroll down and **review** the line level data. Enter the quantity received in the **Quantity** field for each line. Note that the quantity remaining will be entered into this field by default.

PO • P2302426

Line	Item	Catalog No.	Quantity	Status
1	Staples Sticky Notes, 3" x 3" Assorted, 100 Sheets/Pad, 24 Pads/Pack (S-33BR24)	24295902	1	Received

ITEM DETAILS

Contract No. no value

Line Item Type no value

Attachments [Add](#)

Notes

1000 characters remaining

- To remove a line from the receipt, click the **Garbage Can icon** for the item.
- To **Return an Item** enter the quantity as a **Negative Number (Example: -2)** and select **Returned** from the **Line Status** dropdown. You can also select a reason for the return and enter the RMA No, if applicable.

PO • P2302426

Line	Item	Catalog No.	Quantity	Status
1	Staples Sticky Notes, 3" x 3" Assorted, 100 Sheets/Pad, 24 Pads/Pack (S-33BR24)	24295902	-1	Returned

ITEM DETAILS

Contract No. no value

Line Item Type no value

Attachments [Add](#)

Notes

1000 characters remaining

Returned For

RMA No.

- Click **Complete** in the upper right corner.
- The **Receipt Number** displays on the screen. Once a receipt is created, the receipt date is saved, which indicates the date the goods or services were actually received and the receipt complete date, which indicates when the receipt was entered in the system.

✓ Receipt Created

Summary	Next Steps
Receipt No 575787	<a href="#">Create Qty Receipt</a>
Created for the PO No(s) P2302426	