Getting Started with Request for Quotes (RFQ)



PEOPLESOFT ENTERPRISE



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Request Quote



Creating a Request for Quote (RFQ)

STEP 3: Enter a RFQ Reference	Request Quotes Business Unit: TCNJ1 RFQ ID: NEXT View Request Date: 09/08/2009 *Status: On Hold *DtTm Open: 09/08/200 *Currency: USD *Origin: ONL ONL DtTm Close: Image: Currency:	Printable Version 9 6:44PM
STEP 4: Enter the Description, Category, UOM, Quantity	Lines Customize Find View All Find View	irst 🕙 1 of 1 🕨 Last
	*Go to: Copy From Dispatch History Catalog Exchange Rate Header Comments Send Email Item Vendors More RFQ Dispatch Vendor List Unit: TCNJ1 RFQ ID: NEXT Vendor Group Find View All First 1 o	Click "+" to insert a new row or "-" to
Step 6: Add RFQ Vendors through Dispatch List and click OK	*Quote Group ID: Vendors Customize Find View All First Sel *Vendor O000000008 1 A&MCOLDCUT-001 deli & Convenience 0000000012 1 ABDICKCOMP-001 A.B. Dick Company p000000015 1 AQUATDISTR-001 Aquatic Distributors	delete a row
	Dispatch Lines Vendor Details Vendor Lookup OK Cancel Refresh	

STEP 7: Click on Header Comments and add comments STEP 7: Click on Header Copy From Header Comments Send Email	Catalog Exchange Rate Header Details Dispatch Vendor List Item Vendors More Item Vendors
RFQ Header Comments Unit: TCNJ1 RFQ ID: 000000031 RFQ for Stu	ident Apt Repairs
*Sort Method: Comment Time Stamp	*Sort Sequence: Ascending V Sort
Comments	Find View All First 1 of 1 🕨 Last
Copy Standard Comments	Comment Status: Active Inactivate +
→ Type comments here.	STEP 8: Click on Attach to add files. Browse files
Send to Vendor 🔲 Shown at Receipt 🔲 Shown a	t Vouch and click Upload
STEP 9: Associated Document	
Click OK Attachment	Attach Sew Delete Email
From -> RFQ TCNJ1-000000031 OK Cancel Refresh	STEP 11: Change
Request Quotes	and SAVE again
Business Unit: TCNJ1 RFQ ID:	→0000000031
Request Date: 09/08/2009 is *Status:	Open *DtTm Open: 09/08/2009 6:44PM
Reference: RFQ for Student Apt Repairs	DUTIN Close:
Lines	<u>Customize</u> <u>Find</u> View All 🛗 First 🗐 1 of 1 🕨 Last
Sel Line tem *Description	Category [#] UOM Quantity Price
✓ 1 Q SA Repairs	🚍 🖶 GENERAL (Q EA Q 1.0000 🖓 🕂 🖃
STEP 10:	
SAVE	
the	
system	
assigns VII*Go to: Copy From Dispatch History Ca	talog Exchange Rate Header Details Dispatch Vendor List
ID NO.	xt in List Notify C Refresh Related Links Add MUdate/Disolav.



Awarding Quotes

<u>Main Menu</u> >	
Purchasing	
Manage requisitions, purchase orders, receipts, cont	racts, and related data.
Request for Quotes Create requests for quot vendor responses, or av Add/Update RFQs Award Quotes Review RFQ Information	Purchase Orders Add, maintain, and dispatch purchase orders. Image: Add/Update Express POs Image: Approve Amounts Image: Review PO Information

	Award Quot						
	Enter any inform	nation you ha	ve and c	STEP 2: Search for RFQ's to Award. Search by entering			ik for a list of all values.
	Find an Exist	ing Value					
		2					+-1
	Business Unit:	ness Unit: begins with 🔽			or SEARCH	all	
	RFQ ID:	begins with	*			•	
	RFQ Status:	= ~					~
	Origin:	begins with	~		(Q	
	Buyer:	begins with	*		(Q	
Click to	Case Sensi	tive					
search all							
RFQ's	Search	Clear Ba	sic Sear	<u>h 🗏 s</u>	ave Search C	Criter	STEP 3:
)						Select RFO ID.
	Search Res	ults					by clicking ID
	View All		First	1-25	of 25 🕞 Las	st	Number
	Business Unit	rf <u>q ID</u>	RFQ Stat	us <mark>Oriq</mark> ir	Buyer		
	PLANT (0000000001	Approved	<u>I ONL</u>	BROWN		
		000000036	Approved	<u>I ONL</u>	(<u>blank</u>)		
	TCNJ1	000000035	Approved	<u>I ONL</u>	(<u>blank</u>)		
	TCNJ1	000000034	Approved	<u>I ONL</u>	(<u>blank</u>)		
	TCNJ1	000000033	Approved	<u>I ONL</u>	(blank)		
	TCNJ1	000000032	Approved	<u>I ONL</u>	(<u>blank</u>)		
	TCNJ1	0000000029	Approved	<u>ONL</u>	(<u>blank</u>)		

STEP	Analyze Quote Cr Business Unit: To Award List of Items List of Items to Award Line Item 1 List of Vendors who Line Info Mor 5: Award the e to the vendor	eate PO/Contract CNJ1 RFQ ID: to Vendor: 0000000 Description rental of pow equip Responded e Details EEED n Short Vndr Name Qtt BOOSEHAWKE	STEP 4: search io select th award th 0000000036 00145 UOM ver EA	Click on con to e vendo ne quote UHAL RF(Quantity 1.0000 M <u>Price</u> 5,500.00	the r to 2 TEST - 9 Price 5,100.0 C Curr 000 USD	-9-09 MM Curr OU0000 USD Customize Find Quantity 1.0000	Find Vie Due Date) View All # Due Date	USD W All First 1 1 Lead Time Term N30 First 1 1-3 o Lead Time Term N30	of 1 🕑 Last Is Freight Trm DEST f 3 🕑 Last s Freight Trm DEST
hy en	tering the	BRIANGARDE 1.	0000 EA	5,300.00		1.0000		N30	DEST
quant	tity and click	BSW	EA	6,500.00	000 USD	1.0000		N30	DEST
	Total Qty Awarded: Document Status Save Quote Cre	1.0000 Search + Previous in L eate PO/Contract	Order Qt ist ↓ ■ Next i STEP 6 PO/Co	r: List 📄 : Click Cr ntract	1.0000 lotify	Refresh		STEP 7: Click Create	
	Business Unit: TC	NJ1 RFQ ID: 0	00000036	UHAL RFQ	TEST - 9-9	9-09 MM	L		
	Vendor: *Create Form Type: PO/Contracts Defaul Buyer: *PO Date: Dispatch Method: Tay Evempt Flag	BOOSEHAWKE-00 Purchase Order ts 09/09/2009	1 1]		Currency: *PO Type: Origin: Ship To: Location: Match Actio	Eind Vie USD Gene FACII FACII	EVAL FINAL A	te
STEP 8: Click Sel	ID: NEX List of Items to Awa Sel Line Item	T ard <u>Description</u> rental of power	r equip		<u>C</u> Qty Order	Match Rule Customize Find red <u>PO Qty</u>	: THRE	EE_WAY First 1 of 4 Award 1Dist Qty	<mark>I ▶</mark> Last ribute by
	Save & Return to	Search + Previous in I	List + Next	in List	Notify 🔹	Refresh			

Analyze Quote | Create PO/Contract

Ĺ	Analyze Quote Create PO/Contract	L								
	Business Unit: TCNJ1 RFQ ID:	0000000031 RFQ f	or Student Apt Repairs							
	ist of Vendors who Responded			Find View All First	2 of 3 D Last					
	Vendor: BRIANGARDE	-001 1	Currency:	USD 🗹 CI	reate					
STEP 9.	*Create Form Type: Purchase Ord	er 🗸 🗸	*PO Type:	General 💌	Select a					
Solart	PO/Contracts Defaults				Ship To					
Select	Buyer: MEHLER	🔍 🛛 Mark A Mehler	Origin:	ONL Q	and					
Defaults	*PO Date: 09/09/2009	31	Ship To:	FACILDEPT	Location					
-Buyer	Dispatch Method: PRN Q		Location:	FACILDEPT	Location					
-Dispatch	✓ Tax Exempt Flag 22-2797398		Match Action:	Standard 🗸						
-Method	ID: NEXT		Match Rule:	THREE_WAY						
-Ship To	List of Items to Award		<u>Customize Find </u> V	/iew All 📔 🛛 First 🗹 1	of 1 🕨 Last					
-Location	Sel Line Item Description	<u>n</u>	Qty Ordered PO Qty	Qty Award *I	Distribute by					
	✓ 1 SA Repair	rs 🗦	1.0000	1.0000 Q	ty					
	Distribution Step 10: Clic	ck Distribution to	enter the							
	chartfield	distribution, i.e. f	und. class. dept. etc							
	Save & Return to Search + Previo	us in List + Next in List	🖃 Notify 🥠 Refresh							

RFQ PO Distribution



Office of Finance & Business Services RFQ & Express Purchase Order Training Guide Page 7

Creating Express Purchase Order



Enter your email Usermame and password in all lowercase and Click Sign In



PEOPLESOFT ENTERPRISE

User ID: UHAL	Select a Language:	- ~ .
Dassword:	English Dansk	Español Doutsch
Sign In	<u>Dalisk</u> Français Italiano	Français du Canada Maqyar
To set trace flags, click <u>here</u>	<u>Polski</u> <u>Suomi</u> Čeština 한국어 집nu 繁體中文	<u>Portuquês</u> <u>Svenska</u> 日本語 Русский 简体中文 العربية

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Express Purchase Order



Creating an Express PO

		STE	P 3: Select				
		the					
Purchase	Order	/ - Ve	ndor,				
Unit:	TCNJ1	- ,Bu	yer	PO Status:	Open 🗹		
PO ID:	NEXT	/-тсі	NJ Ref	Budget Status:	Not Chk'd		
Copy From:		Ept	er PO Ref	Hold From Furthe	er Processing		
Header							
*PO Date: Vendor	09/09/2009 [3GENERA10-00	Vendor Search	/				
*Vendor ID:	000000002	Generations F	Plumbing & Heati	Receipt Status:	Not Recvd		
*Buyer:	MEHLER	Mark A Metrier		*Dispatch Method:	Print 🗸	Dispatch	
*TCNJ Ref:	Waiver Under Th	reshold 🔽		Amount Summary			
PO Reference:	Emergency Plum	bing Supplies	STEP 4:	Merchandise:	1,200.00		
PO Defaults	PO ACTIVITIES	Add Ship to Cor	Enter the	Freight/Tax/Misc.:	<u>0.00</u>	Calculate	
Add Comments			Description,	Total Amount:	1,200.00	USD	
Add Items From			Category,				
Purchasing Kit	Catalog	Item Search	UOM				
Lines							Find First 🛃 1 o
Line	Item	Description		PO Qty	JOM Category	Amount	Status
▷ 1 💾		Q Plumbing Err	ergency Decker 🛛 🚆 🕏	5 <u>1.0000</u> E	A Q MAINTSUP_	PAR Q 1,200	1.00 💭 Active
Expand View Pri	All Collapse All	Refresh function	5: Click Expanc chartfield distril d, class, dept, pr ect/grantID	I All to enter oution, i.e. ogram,	Go to: More		~
Purchasi	ing Kit <u>Catalog</u>	Item Search					
Lines							Find First 🕙 1 of 1 🕨



E	Express Purchase Order								
F	Purchase Order								
l	Unit:	TCNJ1	PO Status:	Pend Appr					
F	PO ID:	000000149		Budget Status:	Not Chk'd 🔤				
(Copy From:	~		Hold From Furthe	er Processing				
	- llooder								
STEP 9:	e:	09/09/2009	Vendor Search						
Click on		βGENERATIO-001 🔍	Vendor Details						
Header	TID:	000000002	3 Generations Plumbing & Heati	Receipt Status:	Not Recvd				
Commen	ts	MEHLER	Mark A Mehler	*Dispatch Method:	Print V Dispatch				
and add	lef:	Waiver Under Threshold	1 🗸	Amount Summary					
common	erence:	Emergency Plumbing Su	Ipplies	Merchandise:	1 200 00				
commen	Details	PO Activities	Add ShipTo Comments	Facial 4/Tea (Mission	Calculate				
	PO Defaults	Document Status		Freight/Tax/Misc.:	0.00				
I	Add Comments	Requisitions		Total Amount:	1,200.00 USD				

PO Header Comments

Unit:	TCNJ1	PO ID:	000000149	Ven	idor: 3	BGENERATIO-	001		
Retrieve	Active Comments	Only	Retrieve						
*Sort Metho	d: Comment Tir	me Stamp	~	*Sort S	equence	e: Ascending	*	Sort	
Comments						<u>Find</u> View	All Fin	st 🕙 1 of 1	▶ Last
Copy Stan	dard Comments			Comm	ent Stat	us: Active	In	activate	+
Type com	ments here							~	1 V
					STEP	10: Click on			
					Atta	ach to add		~	
					files.	Browse files			1
Send to	o Vendor 📃 Show	/n at Receip	ot 📃 Shown at	Vouch	and c	click Upload	Ø		
Associate	ed Document								
Attachn	nent(86.jpg) (at	tached file	e name)	/	\ttach	View	Delete	Email	
	Upload	Cancel					owse		
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STEP 11:									
Click OK	-> PO TCNJ1-00000	000149							
Оск	Cancel	Refresh							

			STEP 12: Click	k the green
			check box to	place the
			PO in a <i>Pendi</i>	ing Approved
Express Purcha	se Order		status.	a la
Purchase O	rder	Ľ		<u> </u>
Unit: TC	NJ1	PO Status:	Pend Appr	
PO ID: 00	00000149	Budget Status:	Not Chk'd	шQ:
Copy From:	~	Hold From F	urther Processing	
STEP 13:	ave 🖃 Notify 🥠 Refresh			
Click Save				
	Purchase Order Amount Approval			
	Unit: TCNJ1 PO ID: 0000000149 Vendor:	000000002		
	*Approval Action: Approve V Approval St	atus: Initial	View Printabl	e PO
STEP 14: Click	Comment			
Approval Amount	Entered by Tammie Brown 9/9/09			
link from the left				
menu bar. Select				
Approved entering	PO Amount Buver: Mark A Mebler			
your name and the	PO Reference: Emergency Plumbing Suppl	lies		
date and any 🛛 🔭	PO Date: 09/09/2009			
date and any comments for the	PO Date: 09/09/2009 Merchandise Total Amount: 1,200.00 USD	Merchandise Total Base	:: 1,200.0	0 USD
date and any comments for the approver. Click Save	PO Date: 09/09/2009 Merchandise Total Amount: 1,200.00 USD PO Total Value: 1,200.00	Merchandise Total Base PO Total Base:	:: 1,200.0 1,200.0	0 USD 0
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date and any comments for the approver. Click Save Manager App	PO Date: 09/09/2009 Merchandise Total Amount: 1,200.00 PO Total Value: 1,200.00 > Lines Save Return to Search Terval of Purchase Orders from th STEP 1: Cl Worklist f the Purch Homepage	Merchandise Total Base PO Total Base:	E 1,200.0 1,200.0 NOTE: To be a PO it must Approved sta	able to approve be in a Pending itus.
date and any comments for the approver. Click Save Manager App	PO Date: 09/09/2009 Merchandise Total Amount: 1,200.00 PO Total Value: 1,200.00 ▶ Lines ▶ Lines Image: Save Return to Search ★ Previous in List + Next in N	Merchandise Total Base PO Total Base:	Enter and load rece	able to approve be in a Pending itus.
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date and any comments for the approver. Click Save Manager App Manager App Manage requisitions, pu Manage requisitions, pu	PO Date: 09/09/2009 Merchandise Total Amount: 1,200.00 PO Total Value: 1,200.00 Image: Ima	Merchandise Total Base PO Total Base:	x 1,200.0 1,200.0 NOTE: To be a PO it must Approved sta Worklist Worklist <u>Worklist</u>	able to approve be in a Pending itus.

Worklist for ATKINS: Susan Jo Atkins

Detail View				Work Lis	STEP 2: C	Click on the	*
Worklist						\vee	Customize Find
<u>From</u>	Date From	Work Item	Worked By Activity		<u>Priority</u>	Link	
Ron Smith	09/01/2009	Supervisor	PO Amount Approvals	[~	72, TCNJ1, 0000	00079
Ron Smith	09/01/2009	Supervisor	PO Amount Approvals	[*	73, TCNJ1, 0000	000080
Ron Smith	09/01/2009	Supervisor	PO Amount Approvals	[*	74, TCNJ1, 0000	000081
Kenneth Schumacher	09/09/2009	Supervisor	PO Amount Approvals	[~	152, TCNJ1, 000	00000144
Barbara A Uhal	09/09/2009	Supervisor	PO Amount Approvals	[*	155, TCNJ 000	00000149

Purchase Order Amount Approval

	Unit: TCNJ1 PO ID:	0000000149 Vendor:	000000002									
	*Approval Action: Appro	ove 👻 Approval Sta	tus: Initial	View Printable PO								
	Comment											
STEP 3: Enter Approver's	Susan Atkins, appro	ved 9/9/09		<u>~</u> *								
name and												
date	PO Amount											
	Buyer:	Mark A Mehler										
	PO Reference:	Emergency Plumbing Supplie	S									
	PO Date:	09/09/2009										
	Merchandise Total Amount:	1,200.00 USD	Merchandise Total Base:	1,200.00 USD								
STEP 4:	PO Total Value:	1,200.00	PO Total Base:	1,200.00								
Click Save	nes O											
	Save Return to Search	↑ Previous in List	List 🔄 Notify									

Reviewing Purchase Order Activity



Enter your email



PEOPLESOFT ENTERPRISE

username and password in ALL Select a Language: CAPS and click User ID: UHAL English Español Sign In Password: ••••• Dansk **Deutsch** Français du Canada Français Sign In Italiano Magyar Nederlands Norsk Português <u>Polski</u> <u>Suomi</u> Svenska Čeština 日本語 To set trace flags, click here 한국머 Русский 简体中文 <u>繁體中文</u> العربية

ORACLE



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Eind an Existing Value Add a New Value	STEP 2: Select ADD	
Business Unit: TCNJ1 Q		
Receipt Number: NEXT		
PO Receipt		
Add		

Find an Existing Value | Add a New Value

Sel	ect Purch	ase Order									
STEP 3: Enter the PO ID or click SEARCH to search all PO's that are ready to be received	PO Unit: TCNU1 Q Days +/- Today: ID: Or Line/Sched Num: I CH all all tem ID: Ship To: Oe Ship Via: OR Ship Via: OR Retrieve Open PO Schedules									থ <u>Vendor Lookup</u> থ	
	Search				R	eceipt Qty (No Orde	Options r Qty	Ord	ered Qty	O PO Remaining (
The	OK Cancel Refresh STEP 4: Check the selection box for the PO The system retrieves the rows based on the criteria selected. ID you want to receive										
Re	trieved Row	s					<u>Cı</u>	ustomize Find V	iew All 🛄	First 🗐 1-5 of 14 🕨 <u>Last</u>	
Se	PO Unit	vs <u>S</u> hipping H <u>PO ID</u>	Line Sched	e Details <u>Release</u>	Due Date	PO Qty	Prior Receipt	ltem	Descriptio	n	
	TCNJ1	000000002	1 1		09/10/2009	1.0000	3.0000		I TRANS		
	TCNJ1	000000004	1 1		09/16/2009	1.0000	1.0000		Sharpen 3	saws pursuant to quo	
		000000008	1 1		09/16/2009	1.0000	1.0000		<u>I TRANS</u>		
	TCNJ1	000000015	1 1		09/17/2009	1.0000	1.0000		Office Sup	plies	
	TCNJ1	000000016	1 1		09/17/2009	1.0000			ddd		
STEP 5:	Select All	Clear A	<u>AII</u>								
Click OK	ОК	Cancel Re	efresh								

Maiı	ntain I	Rece	ipts												
Re	ceivi	ing													
Busi	ness U	nit:	т	CNJ1			Receipt	Statu	ıs: Ope	n	×				
Rece	eipt ID:		N	IEXT			Add Cor	nmer	nts <u>Activi</u>	ties					
	ador		He	eader Details	ST	EP 6:	Enter								
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Line		ltem	more becans	Description	Price		Receipt Qty		Accept Qty	Status	Serial	Device Track	<u>Device</u> <u>Track</u>		
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	nterfac	e Rece	eipt												
Sa Sa	ave	Notif	y Refr	esh									E	Add	<mark>الا 🗷</mark>

						STER	STEP 7: Click Add						
Mai	intain	Receip	ots			com	mer	its to a	ttach ar	ר 🗋			
Re	ceiv	ving				invo	ice f	or pay	ment				
Bus	iness l	Unit:	т	CNJ1		Receipt	Statu	is: C	pen	×			
Rec	eipt ID:	:	N	IEXT		Add Co	mmer	<u>ts Ac</u>	tivities				
► Ho	ador		H	eader Details									
Sele	duer	hase Ord	or										
Rece	ipt Line	es	<u></u>					Customize	Find View	/ AIL	First	1 of 1	▶ Last
Ree	ceipt Li	Itom	More Details	Links and S	tatus Item / Mfg	Data <u>O</u> pti	onal In	out <u>S</u> ou	otu Statua	ion [=	Device	Device	
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****To view the file(s) attached click on VIEW or hold CTRL key and click on VIEW

	Maint	ain	Receip	ts											
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STEP 10: Click	Inte	erfac	ce Receip	ıt											
SAVE	📳 Sav	e [🖃 Notify	🗘 Re	fresh								E+/	Add 2	Ż

****Make sure status indicates RECEIVED and the system generates a receipt ID.

The invoice is NOT receive if the status does not change to RECEIVED and generates a Receipt ID.

Purchase Order Amount Approva Unit: TCNJ1 PO ID: 211939 *Approval Action: Approve • Comment Comment •	al Vendor: Approval Sf	0000018890 tatus: Initial	The status INITIAL means the requestors the PO indicated on this approved amount panel was created but never approved on this panel. If you are the requestor to approve the PO created click
			save and initial should change to "In Process."
PO Amount			
Buyer: Mark A Me	ehler		
PO Reference:			
PO Date: 11/04/200	19		
Merchandiae Total Amount		Marabandiaa Tatal Daga	
DO Tatal Valvas	83.98 USD	Merchandise Total Base	: 83.98 USD
PO lotal value:	83.98	PO Total Base:	83.98
► Lines			
Save Return to Search + Previou	s in List ↓ ■ Next i	in List E Notify	The status IN PROCESS means the requestor
			, approved the PO after they
Purchase Order Amount Approva	1		created it and the PO was
Unit: TCNJ1 PO ID: 211914	Vendor:	0000019105	sent to the worklist for the
Approv			Dept Manager's approval.
*Approval Action: Approve	Approval St	tatus: In Process	
Comment			
PO Amount			
Buyer: Mark A Me	hler		
PO Reference:			
PO Date: 11/11/200	9		
Merchandise Total Amount:	919.16 USD	Merchandise Total Base	2 919.16 USD
PO Total Value:	919.16	PO Total Base:	919.16
Lines			
Save Return to Search + Previous	s in List Vext i	in List 🔄 Notify	

Purchase Order Amount Approval	The stat the PO i the Dep and Pure	us COMPLETE means s fully approved by artment Managers chasing Buyers
Unit: TCNJ1 PO ID: 211914 Vendor: 0000019105		
*Approval Action: Approve V Approval Status: Complete		
Comment		
PO Amount		
Buyer: Mark A Mehler		
PO Date: 11/11/2009		
Merchandise Total Amount: 919 16 USD Merchandise Total Base:		919 16 USD
PO Total Value: 919.16 PO Total Base:		919.16
▶ Lines		
Save Return to Search TE Previous in List Next in List Notify		the was created and only saved. This means the green check was not check and then re-saved
Express Purchase Order		Keen PO's in open status
Unit: TCN.11 PO Status:	Open	that are incomplete or
PO ID: 211399 Budget Status:	Not Chk'd	that you do not want
Copy From: 🔤 Hold From Furthe	er Processing	Approvers or Purchasing
▼ Header		to process. If the status
*PO Date: 11/09/2009 II Vendor Search Vendor CMHSOFTW-001 Vendor Details		was:
*Vendor ID: 0000014428 CMH Software, Inc Receipt Status:	Not Recvd	APPROVED – Means the
*Buyer: MEHLER Q Mark A Mehler *Dispatch Method:	Print	PO was approved by
PO Reference:		Approver/Manager,
Header Details PO Activities Add ShipTo Comments Freight/Tax/Misc.:	206	Purchasing Buyer and
PO Defaults Document Status Add Comments Requisitions Total Amount:	206	the Budget was
Add Items From Select Lines To Display		successful.
Purchasing Kit Catalog Item Search Line: To: Catalog		DISPATCHED – The PO and budget was successful and the Official PO was printed and sent to the vendor. Note PO's which are not in a "dispatch" status

Express Purchase Order										
Purchase	Order									
Unit:	TCNJ1					PO Sta	atus:	Open	\checkmark	×
PO ID:	211399					Budge	et Status:	Not Chk'd	T.	
Copy From:	~					🗌 Hol	d From Furthe	er Processir	ng	
Header										
*PO Date:	11/09/2009	Vendor Se	arch							
Vendor	CMHSOFTW-001	🔍 <u>Vendor De</u>	tails							
*Vendor ID:	0000014428	CMH Softw	are, Inc			Recei	ot Status:	Not Recvd		
*Buyer:	MEHLER	🔍 🛛 Mark A Mel	nler			*Dispa	atch Method:	Print	~	Dispatch
*TCNJ Ref:	Purchases Under \$	1000 🔽				Amour	nt Summary			Suspanan
PO Reference:	BO Activition	Add ShipT				Merch	andise:		206.50	
PO Defaults	PO Activities Document Status	Add Ship I	Commen	115		Freigh	t/Tax/Misc.:		0.00	Calculate
Add Comments	Requisitions					Total /	Amount:		206.50 U	JSD
Add Items From			Select Li	nes To Disp	lay					
Purchasing Kit	Catalog	Item Search	Line:	Q	To:	Q	Retrieve			

Receiving Invoices In MAPS



Find an Existing Value Add a New Value

Select Purchase Order	-				
Search Criteria					
PO Unit:	TCNJ1		Days +/- Today:		
ID:		>	Start Date:	1	
Line/Sched Num:			End Date:	31	
Release:			Vendor Name:	0	Vendor Lookup
Item ID:		Q	Vendor Item ID:	0	L
Ship To:	Q		Manufacturer ID:		
Ship Via:	Q		Manufacturer's Item ID:		
Retrieve Open PO	Schedules				
Deevel		Rec	eipt Qty Options		
Search		C	No Order Qty	Ordered Qty	PO Remaining (
OK Cancel	Refresh				

Click SEARCH or enter PO ID number

Retri	Retrieved Rows Customize Find View All 🗰 First 🕙 1-5 of 14 🛽 Last											
Sel	ected Row	rs <u>S</u> hipping	Related	<u>M</u> ore	Details							
<u>Sel</u>	<u>PO Unit</u>	<u>PO ID</u>	<u>Line</u>	<u>Sched</u>	<u>Release</u>	<u>Due Date</u>	<u>PO Qty</u>	<u>Prior</u> <u>Receipt</u>	<u>ltem</u>	<u>Description</u>		
	TCNJ1	000000002	1	1		09/10/2009	1.0000	3.0000		I TRANS		
	TCNJ1	000000004	1	1		09/16/2009	1.0000	1.0000		Sharpen 3 saws pursuant to quo		
	TCNJ1	8000000008	1	1		09/16/2009	1.0000	1.0000		I TRANS		
	TCNJ1	000000015	1	1		09/17/2009	1.0000	1.0000		Office Supplies		
	TCNJ1	000000016	1	1		09/17/2009	1.0000			ddd		
Select All Clear All												
0	к с	ancel	efresh									

Select the PO ID you want to receive by checking the selection box.

Maintain F	Receipts											
Receivi	ng											
Business Unit:		TCNJ1 Receipt Status: Open X										
Receipt ID:		IEXT	Add Comments Activities									
	He	eader Details										_
Header												
Select Purcha	<u>ase Order</u>											
Receipt Lines	3		V			Customize Fi	nd View		First -	🛾 1 of 1 🕩	Last	
Receipt Lin	es <u>M</u> ore Details	Links and Stati	us Item / M f	g Data <u>O</u> ptio	onal Ing	put <u>S</u> ource	e Informatio	on 📑	E)	Device		
Line	<u>ltem</u>	Description	Price	<u>Receipt Qty</u>		Accept Qty	<u>Status</u>	<u>Serial</u>	Track	Track		
1 📑		<u>I TRANS</u>	1500.0000(1.0000	Þ	1.0000	Open			<u>Device</u> <u>Track</u>	×	
Interface Receipt												
Save 🖺	Save Notify CRefresh											

Enter the amount of the invoice and click SAVE

Maint	ain Red	eipts										
Receiving												
Busine	ess Unit:		TCNJ1		Rece	eipt S	tatus:	Received	×			
Receip	ot ID:	(000000022		Add	Comr	<u>ments</u> <u>A</u>	ctivities				
			Header Details		Doc	umen	t Status					
Head	ler											
Select F	Purchase	Order										
Receipt Recei	t Lines ipt Lines	More Deta	ils 🍸 <u>Links and S</u> i	t <u>atus</u> Item /	Mfg Data 🍸 🤉	<u>O</u> ption:	<u>Customiz</u> al Input <u>S</u> o	e <u>Find</u> View A ource Information	u 🛄 💷	First 🗹	1 of 1 🕨	Last
Line	ltem		Description	Price	Receipt Qty		Accept Qty	<u>Status</u>	<u>Serial</u>	<u>Device</u> <u>Track</u>	<u>Device</u> <u>Track</u>	
1	1		<u>I TRANS</u>	200.00	1.0000	Þ	1.0000	Received			<u>Device</u> <u>Track</u>	×
Interface Receipt												
Save Notify CRefresh												

Make sure status indicates RECEIVED and the system generates a receipt ID.

The invoice is NOT receive if the status does not change to RECEIVED and generates a Receipt ID.

Reviewing Purchase Order Activity



Enter your email username and password in ALL CAPS and click Sign In

ORACLE

PEOPLESOFT ENTERPRISE

User ID: UHAL	Select a Language:					
	English	<u>Español</u>				
Password: •••••	Dansk	Deutsch				
	Français	Français du Canada				
Sign In	<u>Italiano</u>	Magyar				
	Nederlands	Norsk				
	Polski	Português				
	<u>Suomi</u>	<u>Svenska</u>				
To set trace flags, click here	<u>Čeština</u>	<u>日本語</u>				
······································	<u>한국어</u>	Русский				
	<u>ไทย</u>	简体中文				
	<u>繁體中文</u>	العربية				

ORACLE



Activity S STEP 3: C Invoice T		Click Tab				STEP 2: Amount	View PO (Amt		
Unit:	TCN	IJ1		PO Status: Di	spatched		Ordered)	
PO ID: 000000010		Vendor: Aquatic Distributors Inc							
Lines			•			Custom	ize Find View /	All 📕 🛛 First 🗹	1 of 1 🕑 Last
Deta	ails	Receipt	Invoice	Matched	RTV				
<u>Line</u>		<u>ltem</u>	Item Descri	<u>ption</u>	<u>UOM</u>	Order Qty	Amount Ord	ered Currency	Amount Only
1	ŀ		Admission S	<u>Services</u>	EA	1.0000	883	.000 USD	

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Unit: PO ID:	TCNJ1 0000000010	PO Sta Vendor	tus: Disp :: Aqua	oatched atic Distribi	STEP 4: Vi Invoice Am	ew the nt			
Lines				L	Custom ze	Find View /	All 🔛 🛛 First 🖯	ط _{1 of 1} 🕨	Last
Detai	ls Receipt	Invoice N	latched	RTV					
Line	<u>ltem</u>	Item Description	<u>uom</u>	<u>Amount</u> Only	Amt Invoiced	Currency	<u>Un-invoiced</u> Amount	<u>Currency</u>	
1 🗄		Admission Services	EA		800.000	USD	83.000	USD	1