PURCHASING USER MANUAL

SETTING UP AGENCY RULES

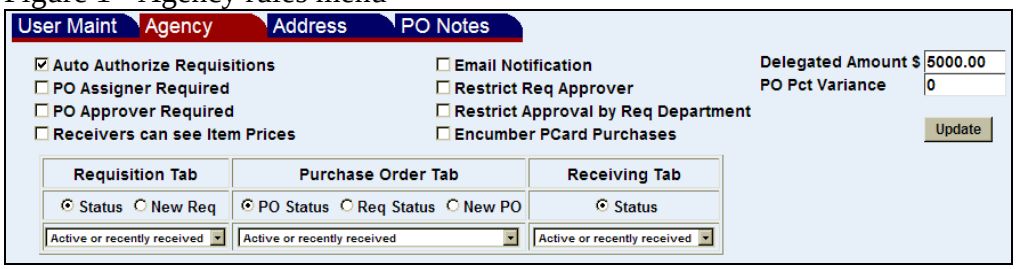
INTRODUCTION

Several of the application's processes can be automated or enabled to suit your agency's business rules. You can set these up and then modify them as needed. Note that **PO Assigner** and **PO Approver** depend on properly setting up your users on the **User Maint** or **Department** screens.

TO SET UP AGENCY RULES

1. Click the **Agency** tab.
2. Check, uncheck, or select the options as needed. See the examples below.
3. When finished, click **Update**.

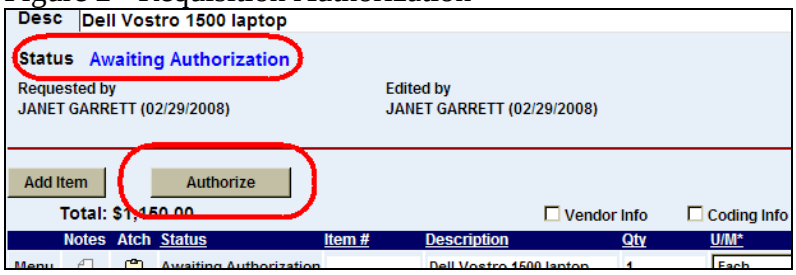
Figure 1 - Agency rules menu



AUTO AUTHORIZE REQUISITIONS

Check this to automatically authorize requisitions so that fiscal coding can be entered. Leave unchecked and requisitions will have to be authorized by a user designated as an **Authorizer**. NOTE: Even when unchecked, if an Authorizer creates a requisition and marks the 'Itemization Complete', the requisition will be 'automatically' authorized.

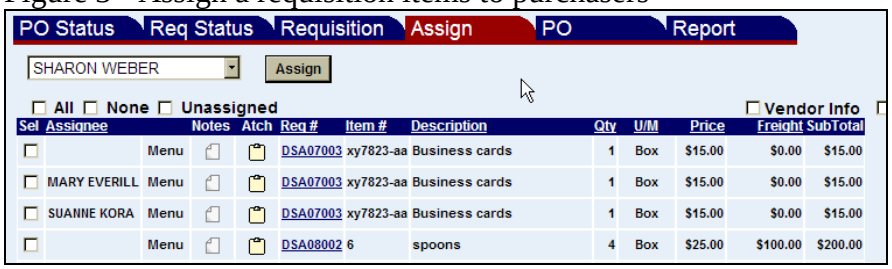
Figure 2 - Requisition Authorization



PO ASSIGNER REQUIRED

Check this to require that purchase orders be assigned to specific purchasers (See example below). A user or users must be designated as an **Assigner** on the **User Maint** screen.

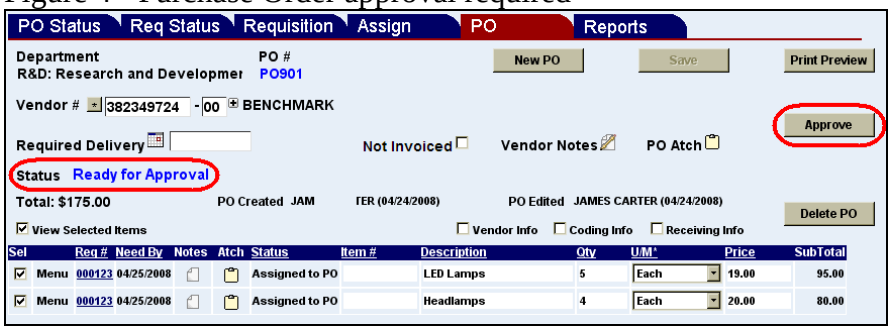
Figure 3 - Assign a requisition items to purchasers



PO APPROVER REQUIRED

Check this to require that a purchase order be approved before the order can be placed with the vendor (see example below). A user or users must be designated as a **PO Approver** on the **User Maint** screen.

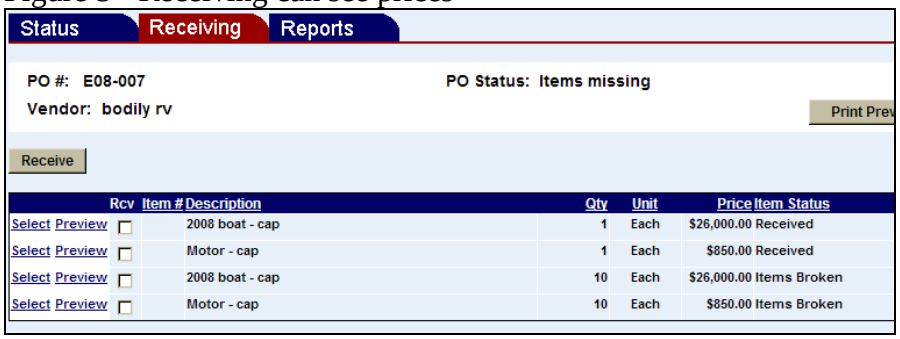
Figure 4 - Purchase Order approval required



RECEIVER CAN SEE ITEM PRICES

Check this to allow receiving personnel to see purchase order items prices on the **Receiving** screen of the application (see example below).

Figure 5 - Receiving can see prices



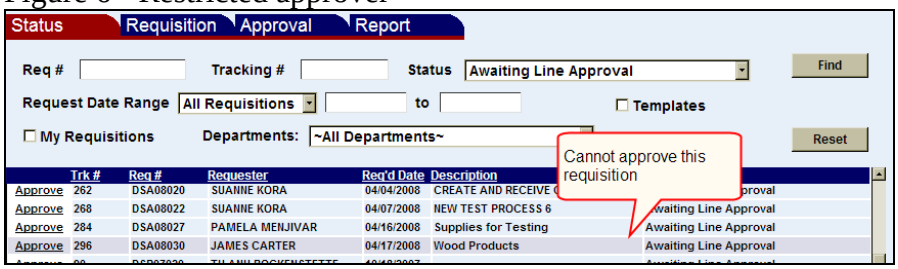
EMAIL NOTIFICATION

Check this for e-mail notifications to be sent when a requisition is unapproved or rejected by a requisition Approver or a Purchaser, or when purchase order items are received. The e-mails will be routed automatically to the person who made the Requisition. E-mails will be sent from SASAdmin@sco.idaho.gov.

RESTRICT REQ APPROVER

Check this to restrict approvers from approving their own requisitions (See example below). This does not restrict based upon PCA or any other criteria – approvers would not be able to approve any line item from a requisition that they created.

Figure 6 - Restricted approver



RESTRICT APPROVAL BY REQ DEPARTMENT

Check this so that requisition approvers can approve only those requisitions (either all at once or by individual line item) assigned to their Requisition Department(s). See example above.

ENCUMBER PCARD PURCHASES

Check this so that P-Card purchases (with a TC215) will be sent to STARS even if the purchaser checks the **Not Invoiced** check box on the **PO** screen.

DELEGATED AMOUNT

The delegated purchasing authority granted to your agency by the Division of Purchasing. Requisitions and purchase orders that exceed this amount can still be entered in the application, but you must contact the Division of Purchasing regarding such purchases.

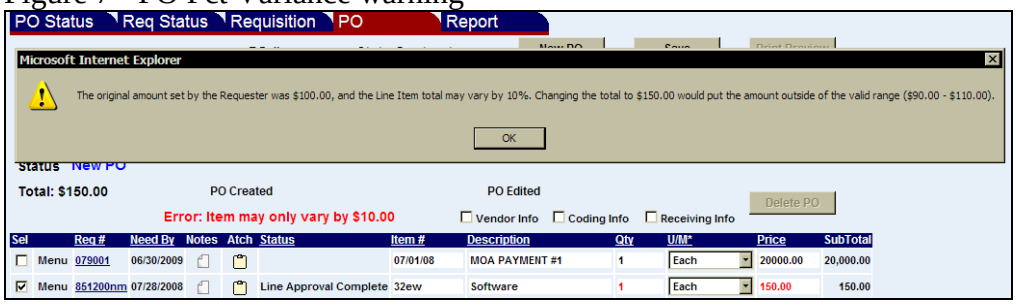
PO PCT VARIANCE

The **PO Pct Variance** is a whole number which represents a percentage, e.g., “10” = “10%”. A purchase order line item amount may not vary from the original requisition line item amount by greater than this percentage. Enter a zero if you do not use the **PO Pct Variance**.

For example, if the requisition line item is $100 and the **PO Pct Variance** is 10%, then the purchase order line item amount cannot be greater than $110 or less than $90. (This includes additional **Freight** on a purchase order line item.)

If a purchaser changes the line item so that the amount exceeds the **PO Pct Variance**, a message will be displayed explaining the restriction.

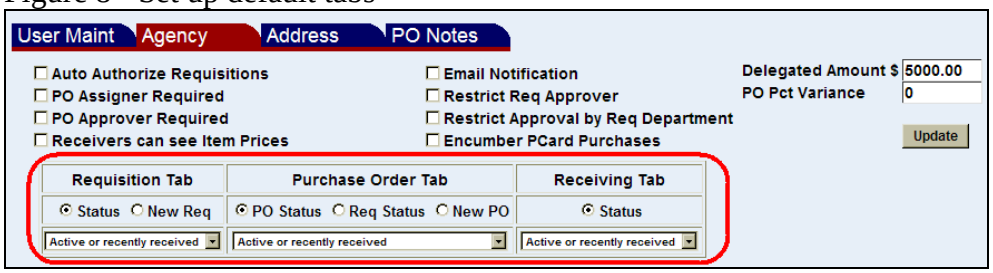
Figure 7 - PO Pct Variance warning



SETTING UP DEFAULT TABS

You can set up which tab of the Requisition, Purchase, or Receiving screen is displayed first when a user open the screens. The system default is to display the Status tab of each screen with the Status set to "Active or recently received". The Status reflects where the requisition is in the process.

Figure 8 - Set up default tabs



TO SET UP THE REQUISITIONS TAB

You can choose to display either the **Status** tab or the **Requisition** tab.

<u>To display the **Status** tab:</u>

1. Select **Status**.
2. Click the drop down menu to select the requisition status to be displayed.
   - Active or recently received
   - All requisitions
3. Click **Update**.

To display the **Requisition** tab:

1. Select **New Req** to display the **Requisition** tab. A 'blank' **Requisition** screen will be displayed so that users can immediately begin creating a new requisition.
2. Click **Update**.

TO SET UP THE PURCHASING TAB

You can choose to display either the **PO Status** tab, the **Req Status** tab, or the **PO** tab.

To display the **PO Status** tab:

1. Select **PO Status**.
2. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Purchase Orders
3. Click **Update**.

To display the **Req Status** tab:

1. Select Req Status.
2. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Requisitions
   - Ready for Purchasing
3. Click **Update**.

To display the **PO** tab:

1. Select **New PO** to display the **PO** tab. The **PO** screen will be displayed so that users can immediately begin creating a new purchase order.
2. Click **Update**.

TO SET UP THE RECEIVING TAB

The **Status** tab is the only available selection; however, you can set up which status is displayed on the **Status** tab.

1. Click the drop down menu to select the status to be displayed.
   - Active or recently received
   - All Purchase Orders
2. Click **Update**.

PURCHASING USER MANUAL

CREATING REQUISITION WORKFLOWS

INTRODUCTION

Before creating workflows in Purchasing, it will help to outline your agency's approval process, identifying where a requisition begins, who makes the first approval, the second, etc., and the final approval. If you have different approval processes for different types of requisitions, you should outline them.

A workflow is the path for routing a requisition line item to a person or a group of people for approval. You can create as many workflows as necessary, each with as many approval levels and as many approvers as needed. Users must be added first and set up as Approvers in order to add them to the workflows. Refer to the Purchasing User Manual for information about adding users to the application.

Workflows can also contain a hierarchy of approval levels, so if you need requisitions to move from one approval to the next and to a final approval level, you would use a workflow to create that process.

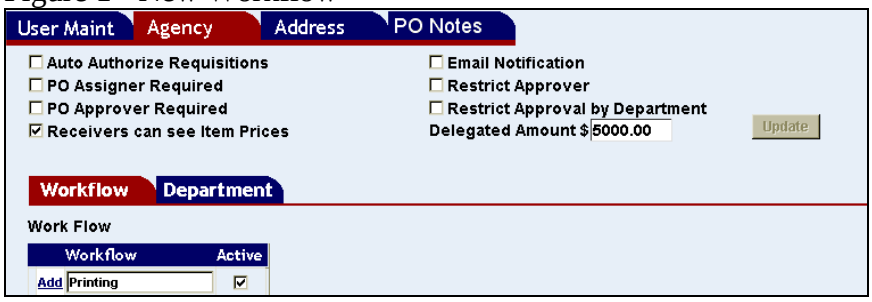
A requisition can be made up of several line items. Each individual item can be assigned to a different workflow, based on however an agency decides, e.g., by the commodity or the amount, etc. Approvers must be assigned to the same workflow as the requisition line items to be able to approve the line items.

CREATE A REQUISITION WORKFLOW

Three components make up a workflow: 1) the name of the workflow, 2) the names of approval levels, and 3) the individual approvers.

1. Click the **Agency** tab and then click the **Workflow** tab.
2. Type a name for the **Workflow** (approximately 50 characters). (The workflow will be selected when a requisition line item is added.) Be sure the **Active** check box is checked. Do not use special characters or symbols, including **&**, **'**, **"**, <, and \.

Figure 1 - New Workflow

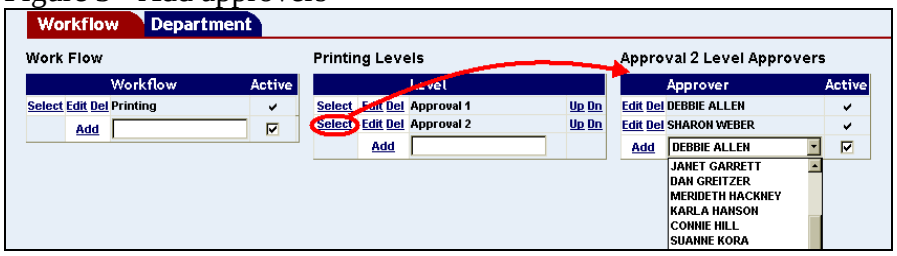


3. Click **Add**.
4. Click **Select** next to the Workflow. The '**Workflow' Approval Levels** section will appear. (The name of the workflow approval level corresponds to the name of the workflow.)
5. Type a name for the '**Workflow' Approval Level** (approximately 50 characters). Do not use special characters or symbols, including **&**, **'**, **"**, <, and \.

Figure 2 - New Workflow Approval Level

6. Click **Add**. NOTE: You can sort the hierarchy of approval levels by clicking **Up** or **Dn** next to each level. However, once a workflow has been used (a requisition assigned to it), you will not be able to change the order of the approval levels.
7. Click **Select** next to the '**Workflow' Approval Level**. The **Approvers** section will appear (labeled with whatever you named the workflow approval level). The approval levels are in hierarchical order. That is, a requisition must be approved by the first level before it can be approved by the second level.
8. Select the approver name(s) from the drop down menu and then click **Add**. You can assign the same user(s) to different approval levels. You can also assign the same user(s) to different workflows.

Figure 3 - Add approvers



NOTE: Although the approvers appear in a list, functionally they are a group of approvers – they are not in a hierarchical order. You can create separate approval levels (which are in hierarchical order), and then assign the approvers to each individual level. This creates a process whereby a requisition has to be approved by a person in one level before it can be approved by a person in the next level.

EDIT A WORKFLOW

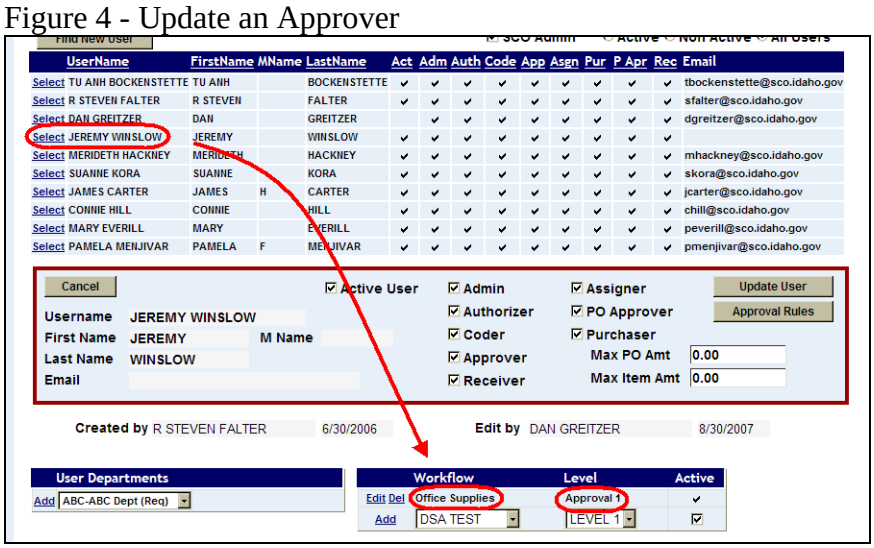
1. To change the name of a workflow or workflow approval level, click **Edit** next to the workflow or level, change the name, and then click **Update**.
2. To delete a workflow, click **Del** next the workflow. All associated levels will be deleted. However, once a workflow has been used (a requisition assigned to it), the workflow cannot be deleted and **Del** will be disabled, even if all requisition items in the workflow have been processed. Once a workflow is used, the only changes you can make are to add or remove approvers, rename the approval levels, and rename the workflow.
3. To change or remove approvers, click **Edit** or **Del** next to an approver's name and then click **Update**.
4. To add a new approver, click **Add** below the list of approvers, add the approver, and then click **Update**.

ADD OR UPDATE WORKFLOW APPROVERS

Once approval levels have been created, individual approvers can be added or removed to workflows, or moved to different approval levels either on the **Agency** screen, or more easily on the **User Maint** (User Maintenance) screen.

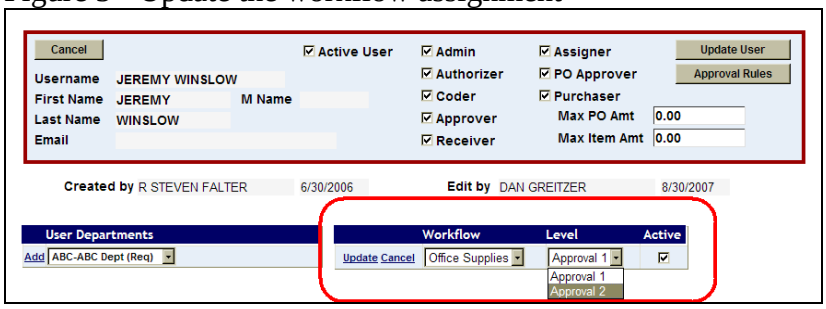
1. Click **Select** next to an approver on the **User Maint** screen.
2. Click **Edit** next to the workflow you want to change for the Approver.

Figure 4 - Update an Approver



3. Click the drop down menus for the **Workflow** and/or the approval **Level** to assign the approver to either a different workflow or to move them to a different approval level within a workflow.

Figure 5 - Update the workflow assignment

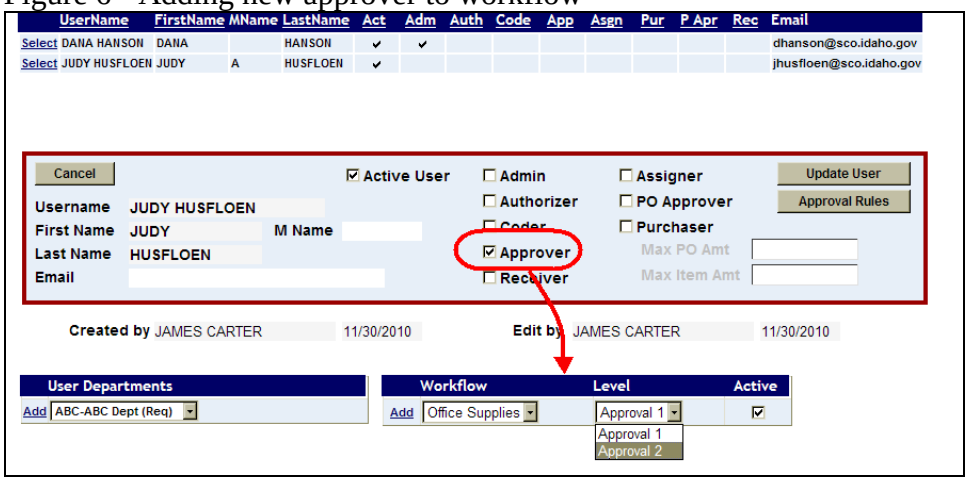


4. Click **Update**.
5. Click **Update User**.

When adding a new approver to the application:

1. After finding and adding the new approver, the workflow drop down menus will become available.
2. Click the drop down menus for the **Workflow** and the approval **Level** to assign the approver to a workflow and an approval level.
3. Click **Add** next to the workflow.
4. Click **Update User**.

Figure 6 - Adding new approver to workflow



EXAMPLES OF REQUISITION WORKFLOWS

Below are three examples of requisition workflows, indicating workflows by bureau, office function, location, etc.

Figure 7 - Workflow example 1

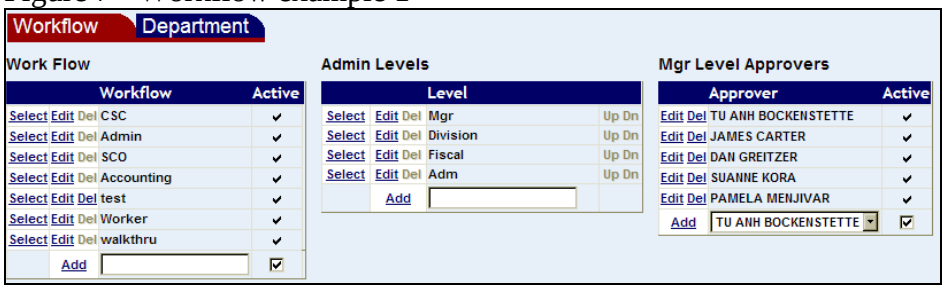


Figure 8 - Workflow example 2

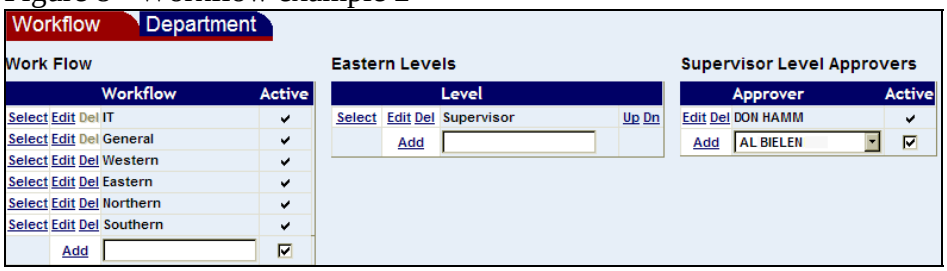
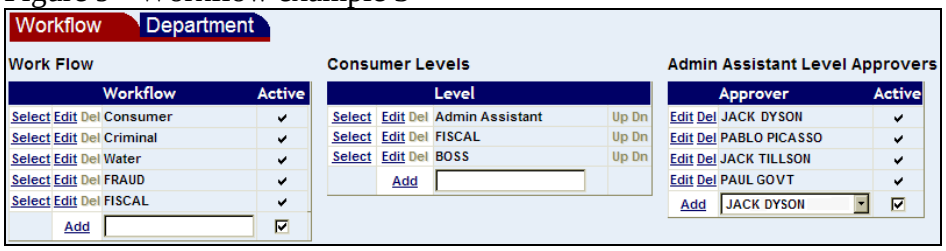


Figure 9 - Workflow example 3



PURCHASING USER MANUAL

CREATING REQUISITION OR PURCHASE ORDER DEPARTMENTS

REQUISITION DEPARTMENTS

Generally, Requisition Departments are not required. However, by creating Requisition Departments, you can sort or filter requisitions on the **Status** screen and you can sort the Purchasing reports (in the Purchasing application) by Requisition Department for analysis. A department can represent a group of users organized however an agency wishes – e.g., by the agency's organizational structure, by location, etc.

There are two instances or processes that require Requisition Departments:

- If an agency wants to automatically generate requisition numbers according to a specific format, then Requisition Departments must be created. If no requisition department is created, requisition numbers must be entered manually.
- Requisition departments can also be used as part of the approval process. You can enable the **Restrict Approval by Req Department** setting on the **Agency** screen so that approvers can approve only those requisitions assigned to their department(s).

PURCHASE ORDER DEPARTMENTS

Similar to requisition departments, purchase order departments are not required. Purchase orders can be assigned to departments so they are organized or categorized for your purchasers.

Purchase Order departments must be used if you want to automatically generate purchase order numbers according to a specific format. If no purchase order department is created, purchase order numbers must be entered manually.

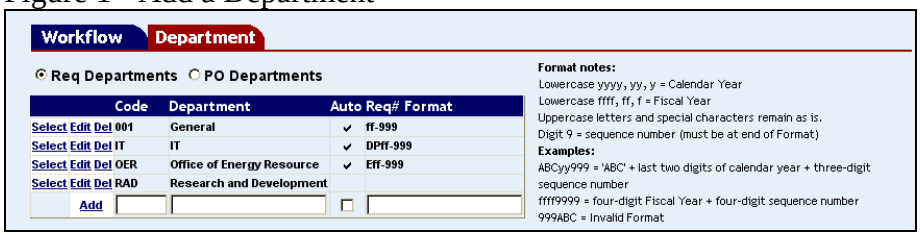
By default, purchase orders do not have to be approved because requisitions are already approved by the time a purchase order is created. However, a purchase order approval process can be set up. If your agency decides to require purchase order approvals, you must enable **PO Approver Required** on the **Agency** screen and assign a user(s) as **PO Approver** on the **User Maint** screen.

TO CREATE A REQUISITION OR PURCHASE ORDER DEPARTMENT

Departments can be created according to the agency's organizational structure, function, location, etc. Departments are not required unless you choose to restrict requisition approvals by department or if you want to automatically assign requisition or purchase order numbers.

1. Click the **Agency** tab and then click the **Department** tab.
2. Select either **Req Departments** or **PO Departments**.
3. Type a three character department code in the **Code** field.
4. Type a name for the department in the **Department** field. Do not use special characters or symbols, including **&**, **'**, **"**, <, and \.
5. Check the **Auto** check box to enable automatic numbering for requisitions and/or purchase orders. Leave unchecked and requisition or purchase order numbers will have to be entered manually.
6. Enter the automatic numbering format according to the **Format notes**. See the Automatic Numbering Format section below.
7. Click **Add**.

Figure 1 - Add a Department

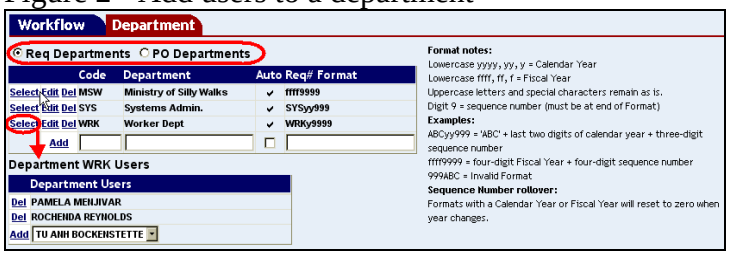


TO ADD USERS TO A DEPARTMENT

Users not added to any departments have access to all departments. To add users to specific departments:

1. Select either **Req Departments** or **PO Departments**.
2. Click **Select** next to a **Department**.
3. Choose a user's name from the drop down menu.
4. Click **Add**. NOTE: You can also add users to departments on the **User Maint** screen.

Figure 2 - Add users to a department

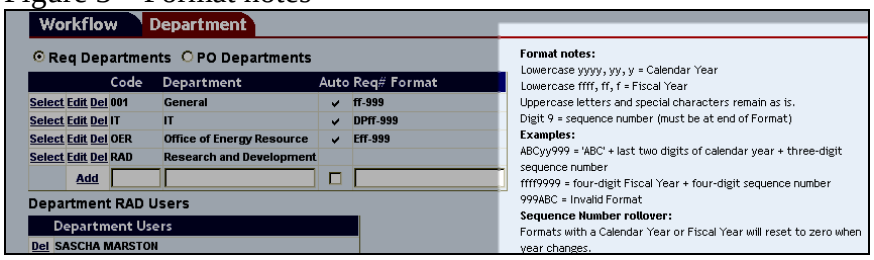


AUTOMATIC NUMBERING FORMAT FOR REQUISITIONS OR PURCHASE ORDERS

When automatic numbering is enabled, requisition or purchase order numbers are automatically generated when the requisition is marked as “Itemize Complete” or when the purchase order is marked as “Ordered”. If no requisition or purchase order department is created, requisition or purchase order numbers must be entered manually.

You must specify the format of the automatically generated numbers. The **Format notes** legend on the **Departments** tab defines the variables to use for the automatic numbering.

Figure 3 – Format notes



Format notes:

- Lowercase yyyy, yy, y = Calendar Year
- Lowercase ffff, ff, f = Fiscal Year
- Uppercase letters and special characters remain as is.
- Digit 9 = sequence number (must be at end of Format)

Examples:

- ABCyy999 = 'ABC' + last two digits of calendar year + three-digit sequence number
- ffff9999 = four-digit Fiscal Year + four-digit sequence number
- 999ABC = Invalid Format

Sequence Number rollover:

- Formats with a Calendar Year or Fiscal Year will reset to zero when year changes.

The following examples demonstrate the results of the formatting:

Req or PO format	Automatically generated number
DSAyy999	DSA08001
yy-999	08-001
ffff9999	20080001
WRKy9999	WRK80001

EXAMPLES OF DEPARTMENTS

Below are three examples of departments.

Figure 1 - Requisition department example

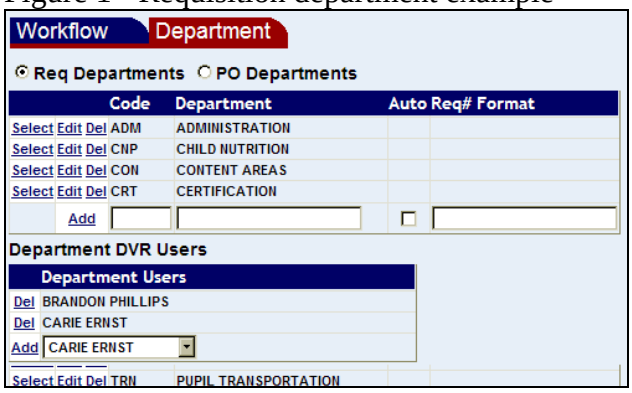


Figure 2 - Purchase Order department example

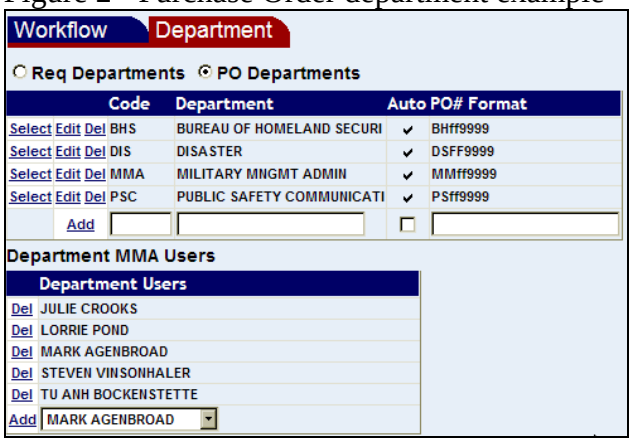
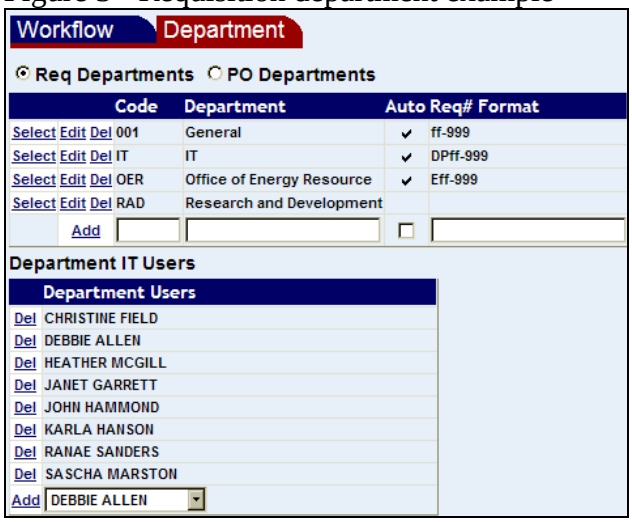


Figure 3 - Requisition department example



PURCHASING USER MANUAL

ADDING AND MAINTAINING USERS

INTRODUCTION

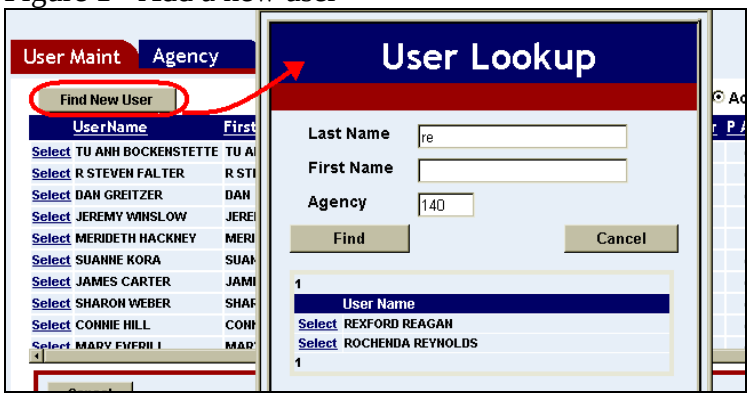
The Purchasing administrator can:

- Add new users and assign their security and any limits on their approval rules.
- Update existing users.
- Assign users to the Workflows and Departments

TO ADD A NEW USER

1. On the **User Maint** tab, Click **Find New User**.
2. In the **User Lookup** dialog box, type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure how it is spelled.)
3. To add an employee <u>from</u> another agency, type the last and/or first name and enter their agency number in the **Agency** field. Do not add an employee from your agency to another agency number.
4. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the person has been added to state payroll records.
5. Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.

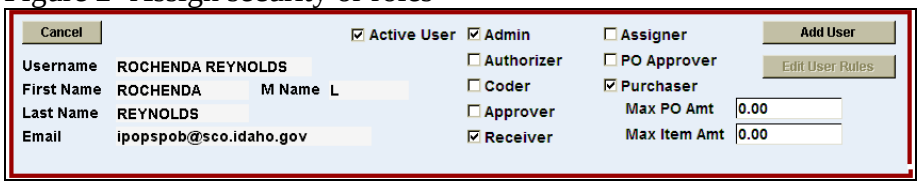
Figure 1 - Add a new user



6. Select **Active User** to grant the user access to the application.
7. Select the security or the roles to assign to the user. Some of these roles are related to settings on the **Agency** screen.

   - **Admin** – an administrator for the Purchasing application.
   - **Authorizer** – authorizes the requisition prior to approval. If you enable **Auto Authorize Requisitions** on the **Agency** screen, you do not need an Authorizer.
   - **Coder** – adds fiscal coding to the line items of the requisition.
   - **Approver** – approves the requisition. Add Approvers to the **Workflow(s)** you create on the **Agency** screen. If you create **Req Departments** on the **Agency** screen and enable **Restrict Approval by Department**, add the Approvers to the appropriate requisition departments.
   - **Assigner** – assigns requisitions to specific purchasers. If you do not enable **PO Assigner Required** on the **Agency** screen, you do not need an Assigner.
   - **Purchaser** – purchases the items from requisitions. Purchasers do not need to belong to Workflows. If you create **PO Departments** on the **Agency** screen, add Purchasers to the departments.
     - **Max PO Amt** – Set the maximum dollar amount of the entire purchase order that the purchaser can make.
     - **Max Item Amt** - Set the maximum dollar amount of a single line item that the purchaser can add to a purchase order.
   - **PO Approver** – approves a purchase order. If you do not enable **PO Approver Required** on the **Agency** screen, you do not need a PO Approver.
   - **Receiver** – receives and records the receipt of the items purchased.
8. Click **Add User**.

Figure 2 -Assign security or roles

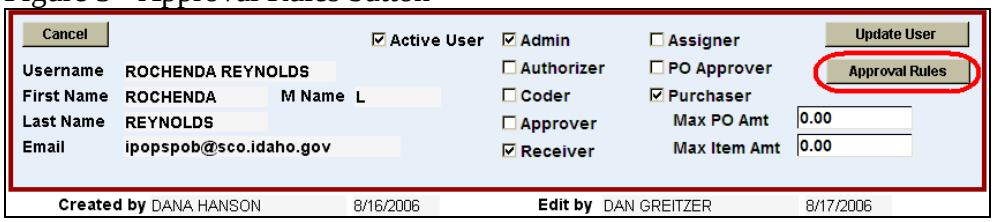


TO ASSIGN SPECIFIC APPROVAL RULES

Specific approval rules can work in conjunction with creating requisition departments and workflows. For instance, two approvers can be assigned to the same department and workflow, but one could approve items that are fiscally coded with specific PCAs.

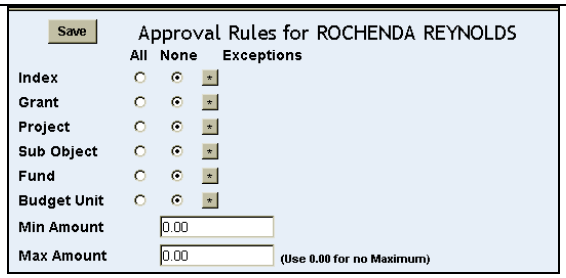
1. To assign approval rules, such as limiting an approver to specific Grants or Funds or Budget Units, click **Approval Rules**.

Figure 3 - Approval Rules button



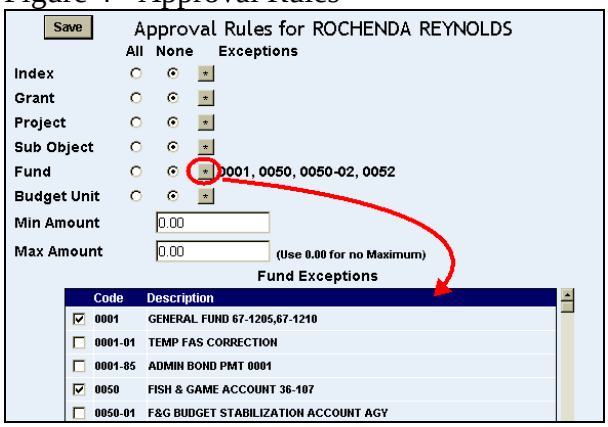
2. Determine the fiscal codes you want to allow the user to approve. The options are:

- Index (or PCA)
- Grant
- Project
- Subobject
- Fund
- Budget Unit



3. Select either **All** or **None** for each fiscal code.
   - **All** indicates that the user can approve *all* Indexes, PCAs, Grants, etc.
   - **None** indicates that the user cannot approve any of them.
4. Click the **Exceptions** asterisk next to a fiscal code to display the list of specific fiscal codes to select as exceptions to the **All** or **None** choice. For example:
   - If you select **All** for **Fund** and then select several Funds from the Exceptions list, the user *can* approve requisition items that are coded with *all* Funds *except* for those selected.
   - If you select **None** for **Fund** and then select several Funds from the Exceptions list, then the user *cannot* approve requisition items *except* for the ones coded with the Funds you selected.

Figure 4 - Approval Rules



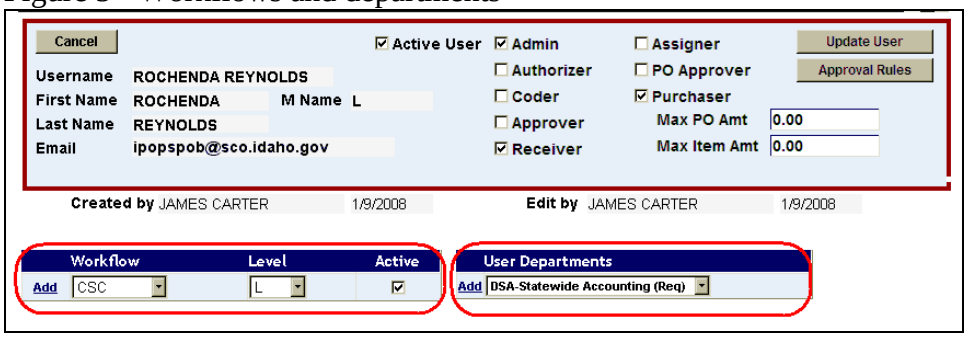
5. Enter a minimum dollar amount (**Min Amount**) and/or a maximum dollar amount (**Max Amount**) of a requisition that the approver can approve. The approver will not be able to approve requisition items higher or lower than these dollar amounts.
6. Click **Save** when finished. Approvers will see that requisition items that they cannot approve will be highlighted in the application. Although the approvers can view the requisition items on the **Approval** screen, they will not be able to approve them.

TO ADD A USER TO A WORKFLOW AND DEPARTMENT

If you have created Workflows and Departments on the **Agency** screen, you can add users to them on the **User Maint** screen. If you add your users before creating Workflows and Departments, you can add them on the **Agency** screen when you create the Workflows and Departments. See Creating Workflows and Departments.

1. On the **User Maint** screen, either select an existing user from the user list, or continue with a new user set up:
2. Select a workflow from the **Workflow** drop down menu.
3. Select a **Level**.
4. Be sure **Active** check box is checked.
5. Click **Add**.
6. Continue adding the user to as many workflows as needed.
7. If you have created departments, select a department from the **User Departments** drop down menu.
8. Click **Add**.
9. Continue adding the user to as many departments as needed.
10. Click **Update User**.

Figure 5 - Workflows and departments



APPROVERS UNABLE TO APPROVE REQUISITION ITEMS

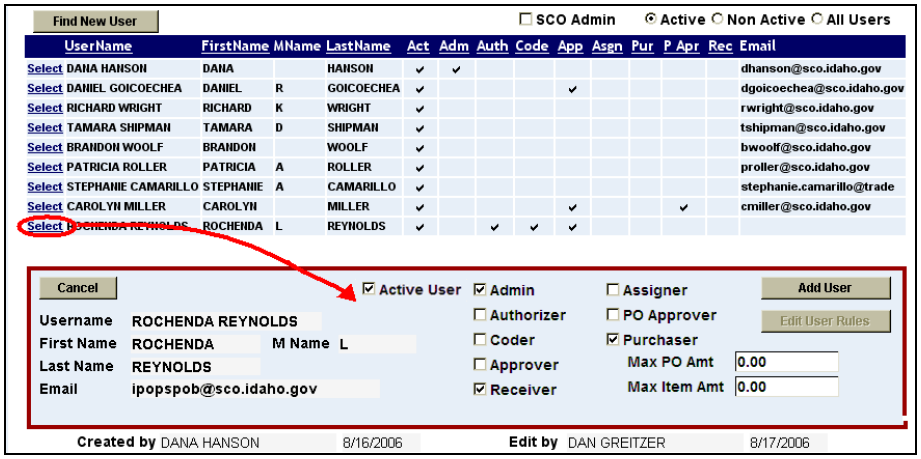
If an approver cannot approve a requisition or requisition line items:

- They are not part of the requisition workflow.
- They are not part of the Requisition Department and you have restricted approvals by department.
- There are line item(s) with fiscal coding or a dollar amount which their approval rules do not allow them to approve.
- They are not an approver.

Users can click **Approve** next to a requisition and then click a line item **Menu** and **Show Reason** to find out why they cannot approve the item.

TO EDIT EXISTING USERS

1. On the **User Maint** tab, click **Select** next to a user's name.



Depending on the changes you want to make, choose from the following:

a. Uncheck **Active User** to remove the user's access to the application.

b. Select or deselect the security or the roles to assign to the user (see above). If a person is removed as an **Approver** but left on the workflow, they will not be able to approve requisitions. But if you remove a user as an **Approver**, you should also remove them from the approver level of requisition workflows.

c. Add a user to a **Workflow** or **Department** as described above.

d. To delete a user from a **Workflow** or **Department**, click **Del** next to the **Workflow** or **Department** name.

e. Click **Approval Rules** to edit the user's approval authority (as described above) and click **Save**.

2. When finished making changes to a user, click **Update User**.

PURCHASING USER MANUAL

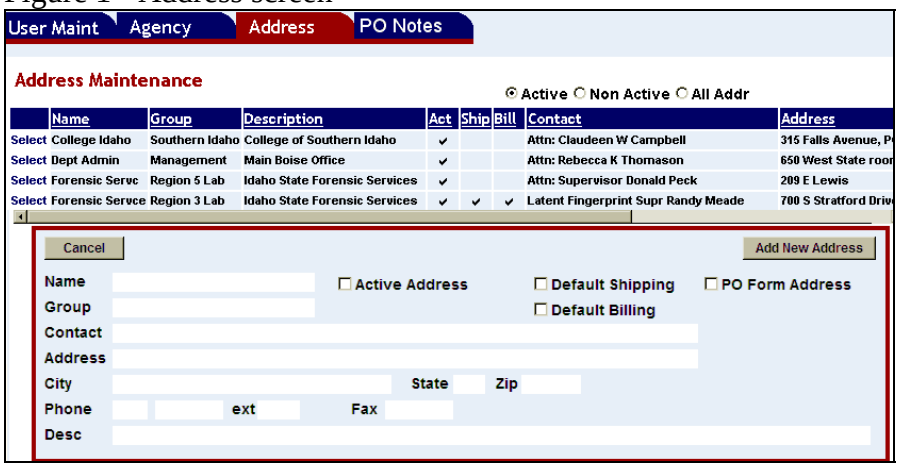
CREATING AN ADDRESS LIST OF BILL TO, SHIP TO, AND PURCHASE ORDER ADDRESSES

INTRODUCTION

Administrators can create an address list for billing and shipping addresses as well as the address for their agency that will print on the purchase order. Requesters and purchasers can then select from the address list when they create line items for their requisitions or purchase orders in order to specify different addresses for shipping and billing.

The **Address** screen is comprised of the list of addresses that you have saved (if any) and a form to add a new address or update an existing one.

Figure 1 - Address screen



Once addresses are added, you can filter the list of addresses by selecting **Active**, **Non-Active**, or **All Addr**. You can also click the column headers to sort the list.

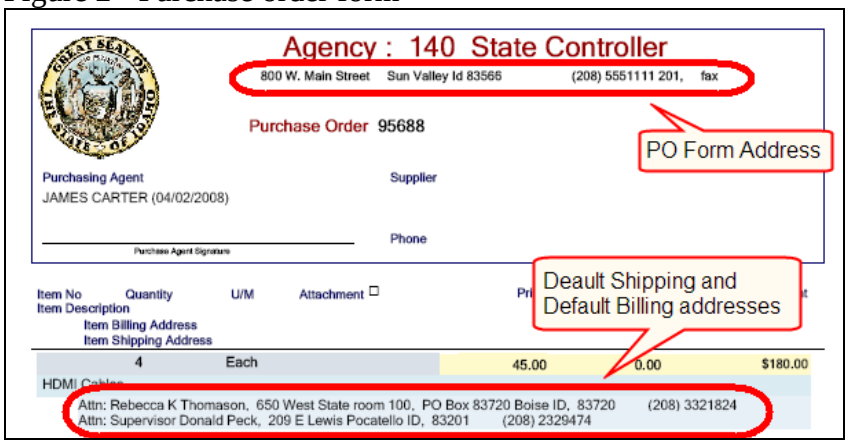
TO ADD A NEW ADDRESS

1. Complete the address fields as needed. The required fields are **Address**, **City**, **State**, and **Zip**. The **Phone** number must be entered without a hyphen (5552222). The **Name** field simply identifies the address on the **Address** screen and helps users select addresses when creating requisitions or purchase orders. It is not printed on a purchase order or on any reports.
2. Be sure the **Active Address** check box is checked.

3. Enter a **Group** name and **Desc** (description), if desired. Do not use special characters or symbols, including **&**, **'**, **"**, <, and \. These identify the address on the **Address** screen and help users select addresses when creating requisitions or purchase orders. They are not printed on a purchase order or on any reports.
4. Enter **Contact** information – for example, a name, department, business entity, etc.. This will print on a purchase order. Do not use special characters or symbols, including **&**, **'**, **"**, <, and \.
5. Check either **Default Shipping** or **Default Billing**, or **PO Form Address**. (The **PO Form Address** will be your agency's address printed on the purchase order.)
6. Click **Add New Address**.
7. To add another address, click **Cancel** (this will clear the form but not cancel the address just added.)

All three addresses will be printed on a purchase order:

Figure 2 - Purchase order form



TO EDIT AN ADDRESS

1. Click **Select** next to an address in the address list.
2. Edit the address as needed.
3. Click **Update Address**.

TO DELETE AN ADDRESS

Although an address cannot actually be deleted, you can hide it from the default view in the Administration screen and also from the view of requesters and purchasers so they cannot select an old or incorrect address.

1. Click **Select** next to an address in the address list.
2. Uncheck the **Active Address** check box.
3. Click **Update Address**.

TO SELECT AN ADDRESS FOR A REQUISITION OR PURCHASE ORDER

The address list is available to users when they create a requisition or purchase order. Users will click the line item **Menu** and select either **Edit Ship-To Address** or **Edit Bill-To Address**. Users can then select an address to apply to one or all line items in the requisition or purchase order.

Figure 3 - Select an address

PURCHASING USER MANUAL

CREATING PURCHASE ORDER NOTES

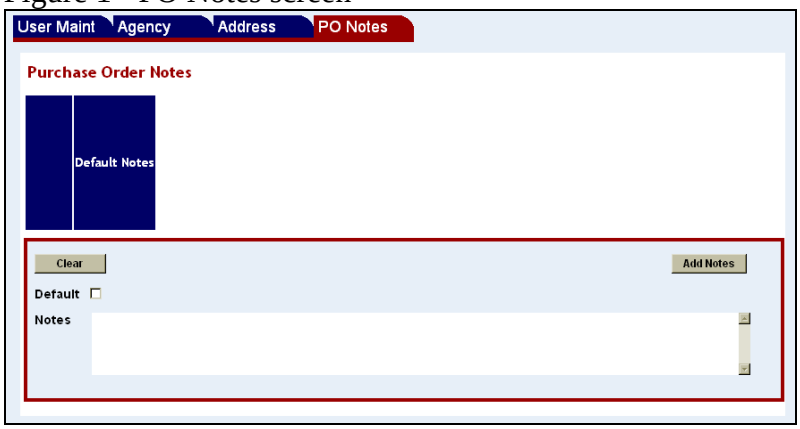
INTRODUCTION

An administrator can create notes or messages that purchasers can select from and append to a purchase order. The administrator can set which notes will be default notes so that they will automatically print on every purchase order without the purchaser having to select them.

TO CREATE PURCHASE ORDER NOTES

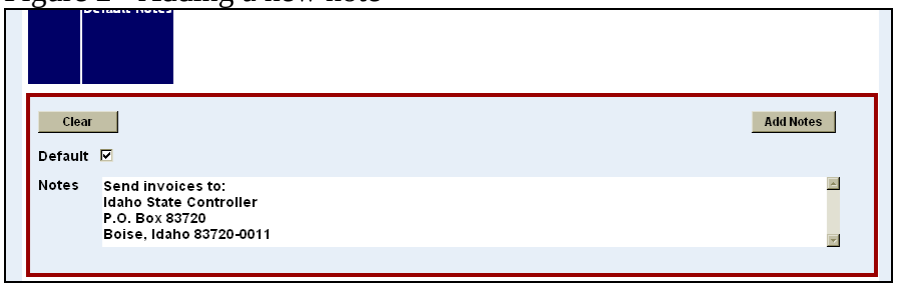
1. On the Administration screen, click the **PO Notes** tab.

Figure 1 - PO Notes screen



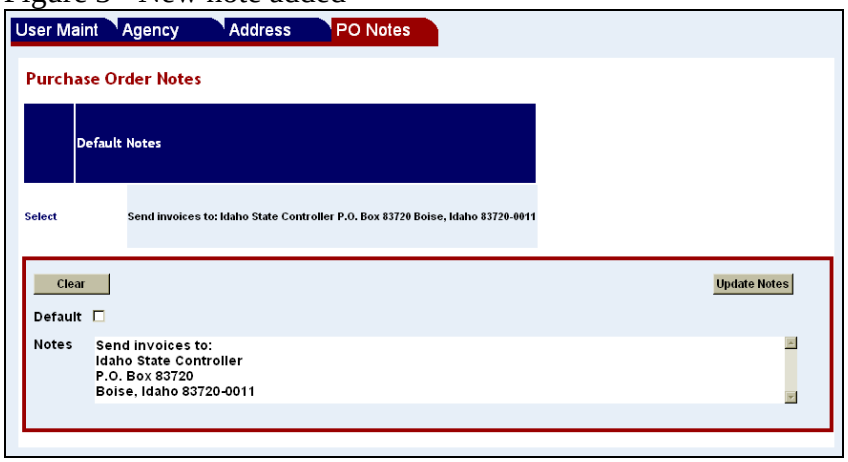
2. In the **Notes** field, type the message you want to appear on a purchase order (up tp 2000 characters). Do not use special characters or symbols, including **&**, **'**, **"**, <, and \. Press ENTER to add separate lines, e.g., as in an address.

Figure 2 - Adding a new note



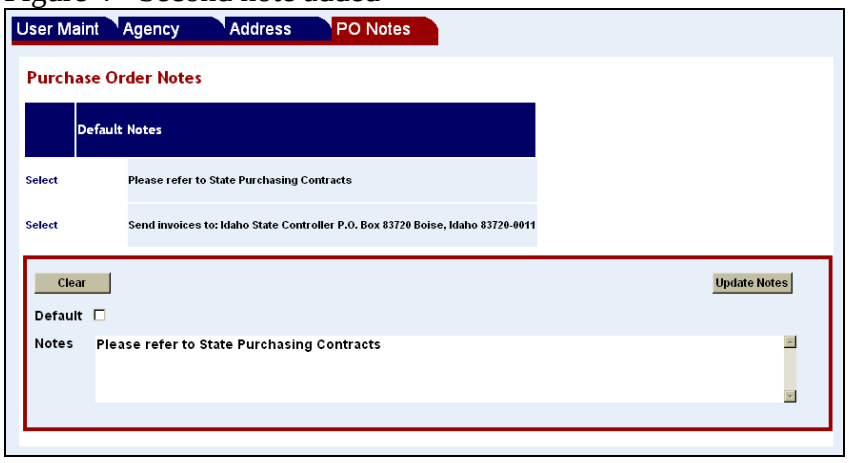
3. Check the **Default** check box if you want the note to print automatically on every purchase order. (You may check more than one, but this can cause printing problems on the purchase order. See below.)
4. Click **Add Notes**.

Figure 3 - New note added



5. To add another note, click **Clear**.
6. In the **Notes** field, type the message you want to appear on a purchase order (2000 character limit).
7. Check the **Default** check box if you want the note to print automatically on every purchase order.
8. Click **Add Notes**.

Figure 4 - Second note added

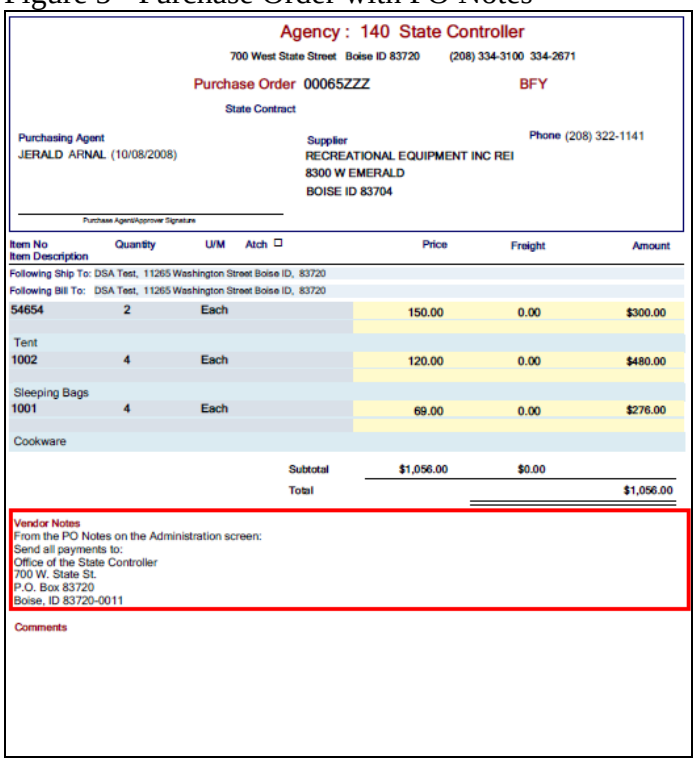


9. To edit a note, click **Select** next to the note.
10. Edit the **Notes** text and then click **Update Notes**.

SELECTING PO NOTES

If needed, Purchasers can select which Default notes they want to apply to a purchaser order. A purchaser would click the **Vendor Notes** icon on the **PO** screen and then click the **Default** tab on the **Vendor Notes** pop-up dialogue box. The Purchaser can then check or uncheck the default notes and click **Save**. Default notes will print in the **Vendor Notes** section of the purchase order.

Figure 5 - Purchase Order with PO Notes



Agency : 140 State Controller
700 West State Street Boise ID 83720 (208) 334-3100 334-2671

Purchase Order 00065ZZZ BFY
State Contract

Purchasing Agent
JERALD ARNAL (10/08/2008)

Supplier
RECREATIONAL EQUIPMENT INC REI
8300 W EMERALD
BOISE ID 83704

Phone (208) 322-1141

Purchase Agent/Approver Signature

Item No / Item Description	Quantity	U/M	Atch ☐	Price	Freight	Amount
Following Ship To: DSA Test, 11265 Washington Street Boise ID, 83720						
Following Bill To: DSA Test, 11265 Washington Street Boise ID, 83720						
54654	2	Each		150.00	0.00	$300.00
Tent						
1002	4	Each		120.00	0.00	$480.00
Sleeping Bags						
1001	4	Each		69.00	0.00	$276.00
Cookware						
			Subtotal	$1,056.00	$0.00	
			Total			$1,056.00

Vendor Notes
From the PO Notes on the Administration screen:
Send all payments to:
Office of the State Controller
700 W. State St.
P.O. Box 83720
Boise, ID 83720-0011

Comments

PRINTING PROBLEMS WITH PO NOTES

Selecting too many default notes may cause the notes to print past the bottom margin of the page. It is also possible that PO Notes that have many, many separate lines (e.g., an itemized list) may print past the bottom margin of the page.

If you have a long document to print along with a purchase order, create it in PDF and store it on a network drive. Purchasers can then add it as an attachment and will be able to select it when they print the purchase order. Click here for instructions on how to attach a document to a purchase order.