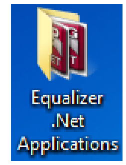
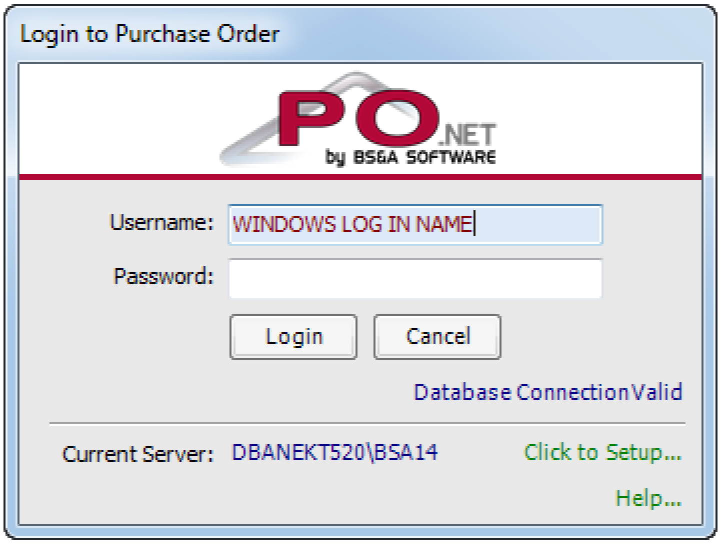
BS&A Purchase Order for the City of Douglasville

Logging In



On your desktop you should have a folder titled Equalizer.Net Applications.
Within this folder will be all of the BS&A programs installed on your workstation. If you are not finding a specific program, contact IT for assistance in having it installed.

To log in to a program double click on the specific module and the following screen will appear:



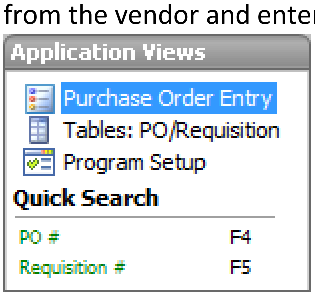
Your Username will show up in CAPS and is the same as your windows log in name.

Your password is case sensitive and is the same password you use to log in to windows.

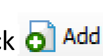
Simply click 'Login' and you will enter the database.

Entering a Requisition – Purchase Order Entry Application View

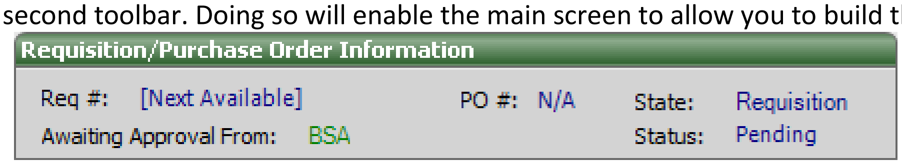
A requisition is going to be required for invoices exceeding $1,000, based on the purchasing policy. If you are spending below this amount, you can still enter a requisition or you can wait for the invoice from the vendor and enter into the Accounts Payable program. Regardless of whether you enter a requisition or not, you will still invoice the purchase in Account Payable when you receive the invoice from the vendor.



To enter a requisition you will want to be on the Purchase Order Entry screen, which you can select in the application views (white box in the top left of the screen).

Once you are on this screen you will have the ability to add a new requisition. To do so you will click 

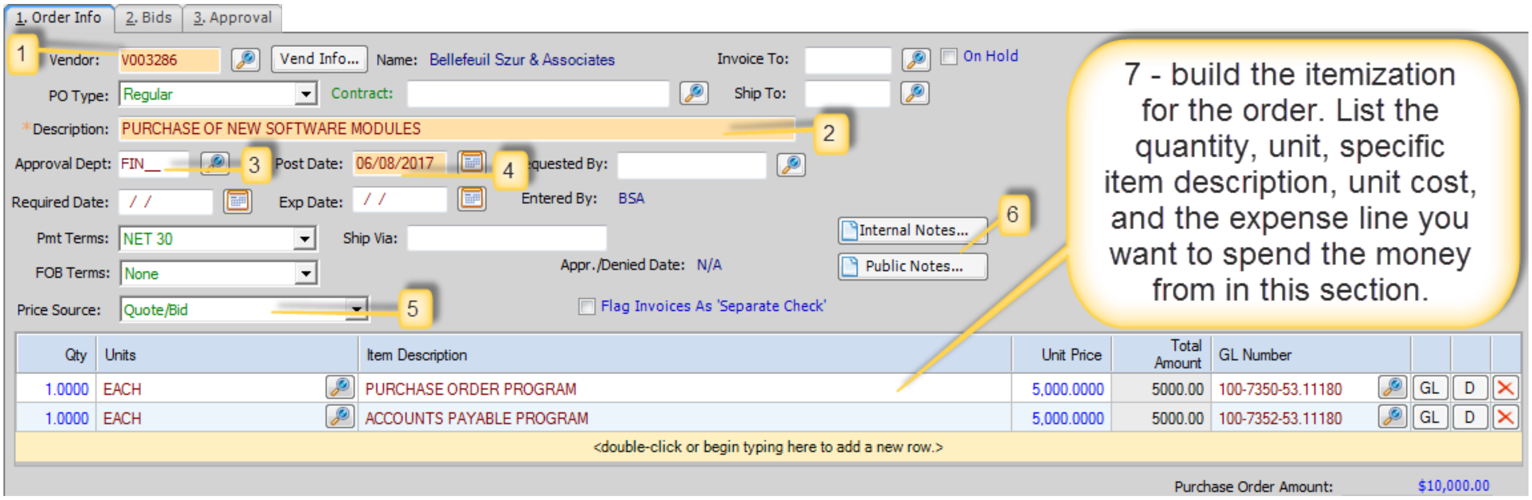
located in the second toolbar. Doing so will enable the main screen to allow you to build the requisition.



The requisition number will be populated when you save at the end – it will assign the next available number at that time. If approved and made into a PO, it will be the same number. The current state is requisition and will show it is awaiting approval from you until you save at the end. Once approved it the state will change to Purchase Order.

Building the Requisition/Purchase Order Information

Anything with the orange background or an asterisk **must** be filled out.

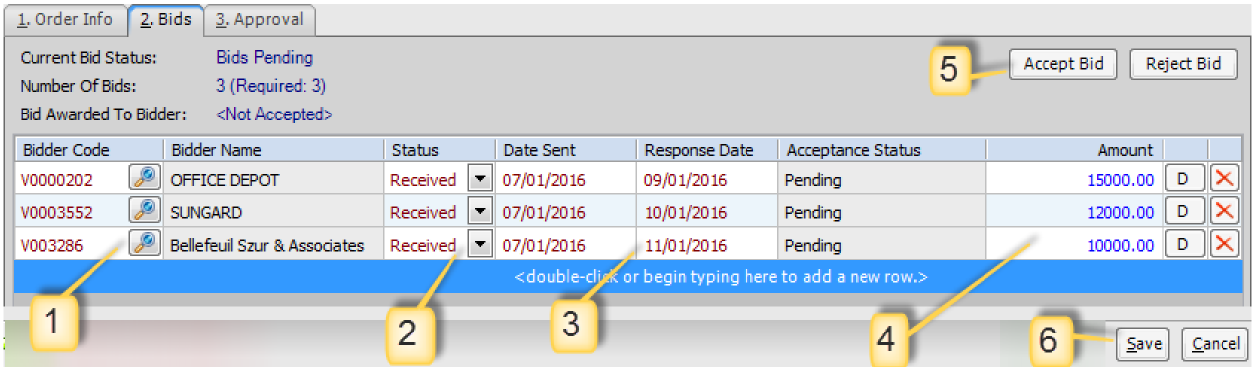


1. Select the vendor you wish to spend the money with
    a. Use the magnifying glass to look them up in the table
    b. Type in part of their vendor name (for this to work see helpful hints at the end of this document)
2. General description of what you are planning to buy
3. Select the department that will need to approve this purchase
4. The post date defaults to the current date you are logged in. Leave this unless directed otherwise by finance.
5. Select a Price Source
    a. Quote/Bid – must go on to Tab 2. and include bidder information (see next section) and include attachments
    b. State Contract – no bids are required
    c. Sole Source – no bids are required
6. Add any applicable notes
    a. Internal Notes are not available for the vendor to see
    b. Public Notes can print on the purchase order if it were to be issued to the vendor
7. Build the itemization for the order

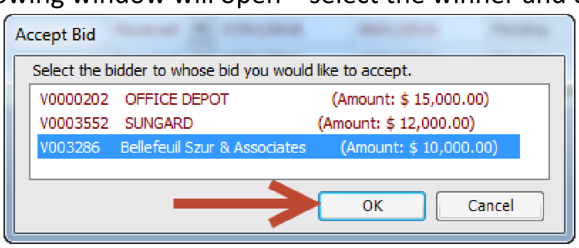
Depending on the Price Source you have selected, you will attach any supporting documentation you wish and click Save in the bottom right. The requisition would then enter the approval process for review. If you have selected Quote/Bid continue on to the next section to complete the requisition.

Entering/Accepting Bids for a Requisition/Purchase Order

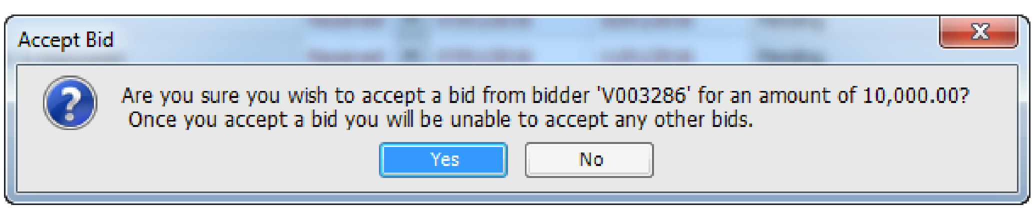
When you have selected the price source 'Quote/Bid' and are spending over $5,000 for a single item, you will be required to list three bids that you have solicited for this purchase. It is done on the second tab of the requisition/purchase order entry screen. Please note, if this is a new vendor for Douglasville they will need to be setup prior to this step – email Ask-Purchasing and they will be able to do this.

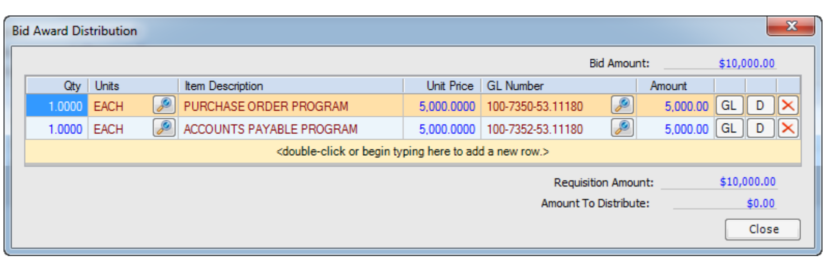


1. Select the Bidder (same codes as vendor) you wish to list
    a. Use the magnifying glass to look them up in the table
    b. Type in part of their vendor name (for this to work see helpful hints at the end of this document)
2. List the status of the bid
    a. Sent
    b. Received – needs to be received to Accept Bid
3. Dates autofill with todays date, you should override these with actual date you asked for bids and received them back from vendors.
4. List the dollar amount each bidder returned with
5. Accept the bid you would issue the purchase order to and actually spend the money with and the following window will open – select the winner and click OK



Once you click OK the following window will open to verify your choice:





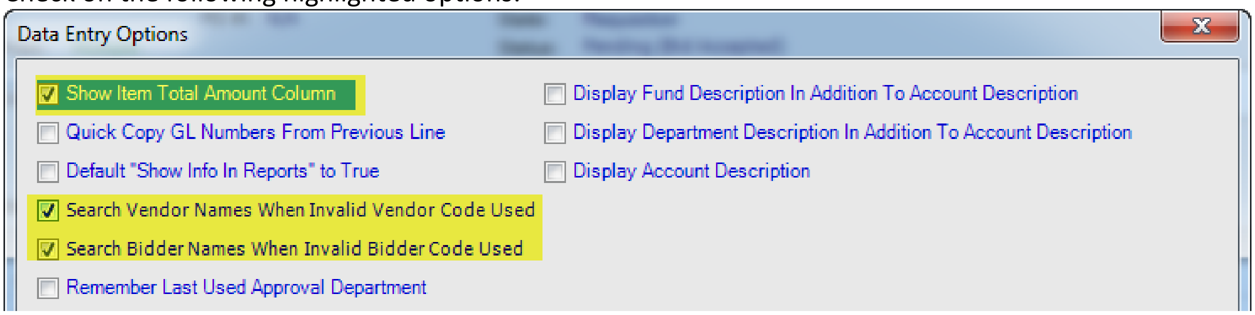
Clicking ‘Yes’ will open the following window for you to review the original information entered for the requisition. You can simply close this.

6. Save in the bottom right

Tips and Tricks

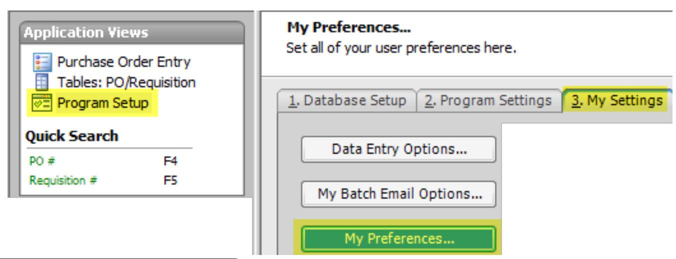
There are some user settings that can make your work in the Purchase Order program easier and more efficient.

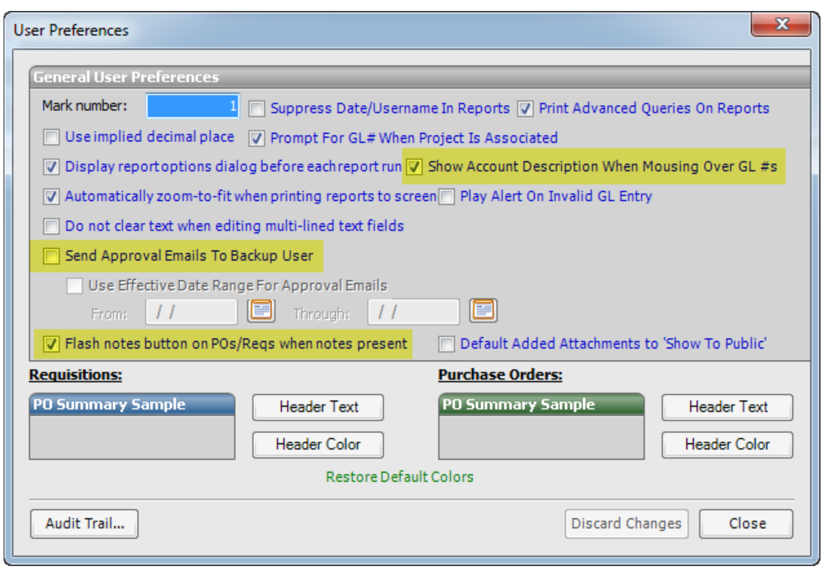
To have the ability to auto search the vendor and bidder list rather than having to scroll through it you will want to be on the Purchase Order Entry application view and click Options in the second toolbar. Check on the following highlighted options:



Showing the item total will allow the quantity X unit price to give line item totals while building the order.
Searching vendor names and bidder names means you don't need to know the specific code or spend the time searching through the table.

Additionally, there are some personal preferences you can turn on in each of the applications that will aid you in your work. For these, you will go to the Program Setup application view and select the My Settings tab.





Showing Account Description will help you ensure you have selected the correct GL number you want to use.

Flashing notes will make it more apparent when notes are present on requisitions and purchase orders.

For approvers – to send emails to your backup please ensure you check this box for the time you will be unavailable to approve.