Buying Tools
Purchase Orders

CFAES Business Office, Columbus
http://cfaesfinance.osu.edu

Purchase Order Summary

- Last choice on the **Procurement Decision Tree**
- Used for procuring goods and services from external vendors
- Vendor must be active and open for ordering in the University’s Vendor Database
- Purchase Order must be created before good or service is received
- Vendor will send an invoice, Ohio State will issue a check, net 30 days
- **eRequest – Standard Purchasing Request**

Have all other options been explored?

- No? **Internal Order**
  - eRequest – Internal Order
- No? **eStores**
  - eRequest – Standard Purchasing Request
- No? **PCard**
  - eRequest – Purchasing Card Preferred
- No? **Checking Account**
- No? **Convenience Order**
  - eRequest – Payment or Reimbursement
- No? **Purchase Order**
  - eRequest – Standard Purchasing Request
**Note on University Vendors:**
- Even if you have created a PO to a vendor in the past, they may not be active and open for ordering
- The AP Payment Compliance Form is required for all new vendors, and to reactivate existing vendors
  - Page 1 completed by Unit
  - Page 2 completed by Suppliers and Individuals
  - Page 3 completed by Suppliers only
- OSU purchasing may still deny your PO request if the good or service can be provided by a contracted vendor

**T number –**
T000123456 – Trip for Ling Yang

**Down-payment information**
Vendor requires down-payment of 50% of the total by 3/31/2014. An invoice will be mailed to you for processing for this down-payment.

**Time frame for PO**
Event is on 6/15/2014 – we need the PO in place no later than 5/31/2014 in order to place the order for the T-shirts in time.

**Instructions for the vendor**
This Purchase Order is an estimate only – we will call prior to the event with a final headcount and cost.

**Replacing PO number**
This replaces PO Number 110003AA22 for July 1, 2014-June 30-2015

**AP Payment Compliance Form**
Note that you have the form and will fax to 614-688-0529

**Attendee/Recipient List**
Hats were given to Sally Smith (employee), Hannah Sanders (non employee), Richard Wright (employee)

**Exception Information –**
Purchase Order is After the Fact because the requestor was not aware that the vendor did not accept credit cards. Exception Form Attached.

**Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)**

---

**eRequest Entry**

- Choose Standard Purchasing Request option
- Enter the description of what will be purchased. ie, “Term order for local phone service”
- Enter your quantity and “unit of measure”
- Enter the estimated amount for the purchase
- Enter the Vendor Information:
  - name, address, phone, fax, contact person, email address and PeopleSoft vendor id (if available)

---

**Direct Link:** https://it.osu.edu/assist/sites/default/files/assisterequest/pdf/Entering%20an%20eRequest%20Job%20Aid.pdf
eRequest Entry

• **Finish the eRequest**
  • Description of what is being purchased
  • How much do you think it will cost?
  • Business Purpose – why are you purchasing the item or service?
  • Attachments:
    • Quote or contract from the Vendor
  • Chartfield:
    • Purchases will always reference a 6xxxx account number
  • Submit for approval

• **See the eRequest Purchase Order Job Aid for help**
  [http://cfaesfinance.osu.edu/training](http://cfaesfinance.osu.edu/training)

---

**Note about Abbreviations** - this list allows users to put abbreviations on forms while still providing auditors with the information they need. Abbreviations should be avoided unless they are on this list.

[http://Go.osu.edu/abbreviation](http://Go.osu.edu/abbreviation)

Want to add an abbreviation to our list? [http://Go.osu.edu/add](http://Go.osu.edu/add)

---

**Note about User Defined values:** If your User Defined doesn't exist (always use the lookup button to check) delete it and enter it in the Special Funding Instructions section. Your Business Office Representative will add for you later.

---

**What happens while you are waiting?**

**Approval by your approver**

Approval

**Processed within 2 week**

**Business Office Processing**

**Vendor Processing**

Fill your order
Next Steps for you…

- **Check the status of your request**
  - Search for your request
  - If status is “complete”, your PO has been created and dispatched to the vendor
  - A copy of your PO is attached to the request
  - Your PO number will be in the “transaction ID” or “quote ID” field (remember, PO’s end in numbers, requisitions end in letters. You want the PO number)

- **Follow up with your vendor**
  To be sure they received the purchase order and are working to fulfill your order

- **Submit invoice for payment**
  The Business Office will process a payment to the vendor, no need to submit an eRequest – just mail the invoice.

<table>
<thead>
<tr>
<th>Request #</th>
<th>Request Status</th>
<th>Submitted Date</th>
<th>Requested For / Requester Name</th>
<th>Org</th>
<th>Program</th>
<th>Project</th>
<th>Transaction ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>1331099</td>
<td>COMPLETE</td>
<td>05/19/2013 2:31 PM</td>
<td>Michel, Wendy Marie</td>
<td>55013</td>
<td></td>
<td></td>
<td>550114AA20</td>
</tr>
</tbody>
</table>