

# How to enter a P-card Purchase Order

<b>Required for:</b>		
<b>Campus Cards</b>	<b>Department &amp; Individual Cards</b>	<b>Departmental Activity Funds</b>
Purchases over \$500	Purchases over \$1,500	Purchases over \$250

# How to enter a P-Card Purchase Order

## 1. Add new requisition and select PCARD dept/loc

The screenshot shows the 'Requisition Entry - Munis [BIRDEVILLE ISD]' interface. The top navigation bar includes 'HOME' and various tool icons. The main form is divided into several sections:

- Main:** Dept/Loc is set to 'PCARD'. Requisition number is '11819490'. Status is 'Created'. Entered date is '05/22/2018'. Annotations include '1. Select Dept/ Loc PCARD' and '2. Add General Description'.
- Vendor:** Vendor field is empty. Delivery method has 'Print' selected. Annotations include '4. Add vendor #' and '5. Delivery Method should be PRINT'.
- Shipping and Billing:** Ship to address is 'BISD BUSINESS OFFICE, 3124 CARSON STREET, HALTOM CITY, TX 76117'. Email is 'erika.ayala@birdvilleschools.net'. Reference field is empty. Annotation: '7. Add Reference'.
- Miscellaneous:** Allocation is empty. Type is 'N - NORMAL'. Annotation: '6. Add Vendor/ Sourcing notes and include "P-CARD PURCHASE"'.
- Line Items:** A table with columns: Line, Description, Vendor, Qty, Unit Price, UOM, Freight, Disc %, Credit, Line Total, Justification, Manufacturer.
- Workflow:** Buttons for 'My Approvals', 'Approve', 'Reject', 'Forward', 'Hold', 'Approvers', and 'Conversion'.

Annotations in red text and boxes:

- 8. Accept (pointing to the Confirm button)
- 1. Select Dept/ Loc PCARD
- 2. Add General Description
- 4. Add vendor #
- 5. Delivery Method should be PRINT
- 6. Add Vendor/ Sourcing notes and include "P-CARD PURCHASE"
- 7. Add Reference

2. Once you accept MUNIS will direct you to Line Items. Here you will add 1 line only as shown below

HOME

Requisition Entry - Munis [BIRDVILLE ISD] > Line Items

Accept Cancel Search Query Builder Add Update Duplicate Print PDF Excel Word Notes Attach Notify Maplink Alerts

4. Accept

5. Return

Requisition

Fiscal year 2018 Number 11819490 Line 1

Detail

Quantity 1.00 Amount .00000

2. The amount should be the total amount for the order including shipping

Description 1. Add description Ex:

1. Add description Ex:

- Science Supplies
- Conference Registration for Mrs. Smith
- 1st grade field trip to the zoo 100 students @ 5.00 = \$500.00

Miscellaneous

Manufacturer Bid

Manufacturer item no. Fixed Asset

Vendor item no.

Seq	T	Account	Description	Amount	GL Bud

3. Enter budget code(s)

1 LINE ONLY!!! P-Card Purchase Orders should only have 1 line item with the total order amount.

For Hotels be sure to include city tax and/or state tax if applicable.

### 3. Attach documents such as quote, travel forms, agenda, etc.

HOME

Requisition Entry - Munic [BIRDVILLE 1SD]

Accept Cancel Search Query Builder Add Update Delete Global-Duplicate Print PDF Excel Word Email Schedule Office Notes Audit Maplink- Return

2. Accept

1. Attach Documents such as quote, travel forms, agenda, etc.

**Main**

Dept/Loc: PCARD Purchasing  
 Fiscal year: 2018 (Current) Next  
 Requisition number: 11819490  
 Status: 2 Created  
 Entered: 05/22/2018 By: b15105  
 PO expiration:   
 Receive by:   
 Quantity  Amount  
 Three way match required  
 Inspection required By:   
 General commodity:   
 General description:   
 General Notes:   
 Vendor:   
 Name:   
 PO mailing:   
 Delivery method:  Print  Fax  E-Mail  E-Procurement  
 Address:   
 Shipping and Billing:   
 Ship to: 947   
 Address: BIRD BUSINESS OFFICE  
 3124 CARSON STREET  
 HALTOM CITY TX 76117  
 Email: erika.ayala@birdvilleschools.net  
 Reference:   
 Vendor/Sourcing Notes:   
 Vendor Quotes (0):   
 Miscellaneous:   
 Allocation:   
 Type: N - NORMAL  
 PO:   
**Line Items**

Line	Description	Vendor	Qty	Unit Price	UOM	Freight	Disc %	Credit	Line Total	Justification	Manufacturer
<p>Accounts Total amount</p>											

**Workflow** My Approvals Approve Reject Forward Hold Approvers

**Conversion** Convert

0 of 0

#### 4. Release for approvals

Requisition Entry - Munis [BIRDVILLE ISD]

HOME

Accept Cancel Search Query Builder Add Update Delete Global Duplicate Print PDF Excel Word Email Schedule Attach Notify Maplink Alerts Release Menu More... Return

Confirm Search Actions Output Office Tools Alerts Menu

**1. Release for Approvals**

**Main**

Dept/Loc: 99PC Purchasing  
Fiscal year: 2018 Current Next  
Requisition number: 11819490  
General commodity: ...  
General description: Science Supplies  
Status: 4 Allocated  
Entered: 05/22/2018 By: b15105  
PO expiration: 06/30/2018  
Receive by:  Quantity  Amount  
 Three way match required  
 Inspection required By: ...

**Vendor**

Vendor: 4349 Committed  
Name: PELLETS INC  
PO mailing: 0  
Delivery method:  Print  Fax  E-Mail  E-Procurement  
Address: P O BOX 5484  
BELLINGHAM WA 98227  
Vendor/Sourcing Notes Vendor Quotes (0)

**Shipping and Billing**

Ship to: 947  
Address: BIRD BUSINESS OFFICE  
3124 CARSON STREET  
HALTOM CITY TX 76117  
Email: erika.ayala@birdvilleschools.net  
Reference: ERIKA AYALA 817-547-5627

**Miscellaneous**

Allocation: ...  
Type: N - NORMAL  
PO: ...

**Line Items**

Line	Description	Vendor	Qty	Unit Price	UOM	Freight	Disc %	Credit	Line Total	Justification	Manufacturer
1	science	(4349) PELLETS INC	1.00	100.00000		0.00	0.00	0.00	100.00	Not Needed	

Accounts Total amount 100.00

**Workflow**

My Approvals Approve Reject Forward Hold Approvers Conversion Convert

Once the requisition has been approved and converted to a Purchase Order you will receive a copy of the Purchase Order via Email. Order can then be placed with vendor and P-Card can be issued for payment once the goods/services and invoice have been received.