

NEW FEATURES

- Requisition Searches
- Yellow highlight indicates the line is selected
- Blue highlight means the mouse is currently hovering over the line (NOT selected)

COMMON QUESTIONS

- How many line items can be in a single Requisition?
 - It is recommend for a requisition not to exceed 10 line items if being delivered to the Warehouse
- Is there a *'time-out'* after non-activity in TEAMS?
 - Yes. After 30 minutes of inactivity within TEAMS you will be logged out of they system.
SAVE OFTEN!
- What file type do I have to use when attaching documents to a requisition?
 - Any file format is currently accepted
- How will I receive a copy of the PO?
 - Make sure your email address is in the correct format inside the Special Instructions

NEW VOCABULARY

Region X

- Purchase Order or PO ==>
- “Y” Screen =====>

TEAMS

Requisition *(a requisition becomes a PO once it is approved by purchasing and a PO number is generated)*

Special Instructions *(traditional requisition)*

OR

Description *(not to exceed & project requisition)*

TYPES OF PO'S

Region X

- 2 Types =====>
- Regular PO
- Open PO

TEAMS

- 3 Types
- Traditional
- Not to Exceed
 - * "One & Done"
 - * Maximum of \$500
 - * No funds may be added
 - * PO closes automatically once receiving takes place
- Project
 - * Resembles OPEN PO.
 - * Uses will be Sam's or Wal-Mart
 - * Funds may be added to PO
 - * Accounts payable will close PO when asked to do so by originator

SELECTING VENDORS

Region X

- “One Big Pile” =====>

TEAMS

- Vendors are in categories
 - no more than 2000 in any single category

- ✓ You can view a full list of categories and the assigned buyers associated with each category by visiting: http://cfbpurchasing.com/Content/teams_transition.html
- ✓ Approved vendor does not mean awarded. If the vendor you are using is not on the purchasing website. Contact a buyer.
- ✓ Not recommended to search by category.

DUPLICATING PO'S

Region X

TEAMS

- Had a 'Duplicate' feature ==> Favorite Carts

✓ Realize that the *Requisition* you are creating is useful and might be needed again. Therefore, you should save it as a favorite cart before exiting

APPLYING DISCOUNTS

Region X

- Enter 10 equals 10% =====>
(you don't have to enter the '%' sign)

TEAMS

Required to enter '%' sign
(must add discount % to each line on requisition)

- ✓ Realize that the *Requisition* you are creating is useful and might be needed again. Therefore, you should save it as a favorite cart before exiting

SPECIAL INSTRUCTIONS

TRADITIONAL (Y SCREEN)

- To copy and paste from cfbpurchasing.com
- control + c =====> COPY
- control + v =====> PASTE
- EMAIL: name@cfbisd.edu#

The screenshot shows the 'Create Requisition' interface with the 'Line Items' tab selected. The 'Traditional Requisition Line Items' table is visible, with columns for 'Save as Fav.?', 'Quantity', 'Vendor Stock Number', 'Unit of Measure', 'Short Description', 'Justification', 'Special Instructions', 'Unit Price', 'Unit Dsct.', and 'Total Line Amount'. The 'Special Instructions' column is circled in red, and a red arrow points to it with the text 'this is your Y Screen'. Below the table, there are buttons for 'Add Line from Scratch', 'Add Line from Catalog', and 'Save Cart as Incomplete'.

Save as Fav.?	Quantity	Vendor Stock Number	Unit of Measure	Short Description	Justification	Special Instructions	Unit Price	Unit Dsct.	Total Line Amount	
<input type="checkbox"/>	1.0						0.00	0.00	0.00	(click to add an

SPECIAL INSTRUCTIONS

PROJECT (Y SCREEN)

- To copy and paste from cfbpurchasing.com
- control + c =====> COPY
- control + v =====> PASTE
- EMAIL: name@cfbisd.edu#

Create Project Requisition

Create Project Requisition Header

Fiscal Year: * 2012

Category: *

Requestor: *

Ship-To Location: *

Description: *

Characters remaining: 1000 (1000 max)

Description	Total Amount	Released Amount	Balance Amount	Account Numbers
	0.00	0.00	0.00	(click to add an account)

Add New Description

Messages

Create Project Requisition Attachments

File Description

Submit Clear Notes

PUT Y SCREEN INFORMATION HERE



All Purchasing Guidelines still apply!

Consult the purchasing webpage first!

CFBPURCHASING.COM