

Electronic Purchase Order Procedures

Purchase orders are to be issued prior to ordering items/services:

- All efforts should be made to get the purchase order prior to placing an order; however, exceptions may be made for emergency purchases
- Invoice payments may be delayed if the purchase order number is not on the invoice received
- A "Request for Purchase" (Requisition) are completed on-line via computer, phone or tablet

To Access Website: Log in to: my.bumc.net/financials/portal

- Use ARENA username and password to login
- CLICK "Request a Purchase"
- CLICK the **blue plus-sign "+"** on the left-hand side of the screen

Complete Electronic Purchase Order:

On the next screen complete the following information. **Type entries slowly** so that the system can retrieve information for the drop-down list on the screen. **ALWAYS select from the drop-down list** when provided for entry to be valid.

- **VENDOR –**
 - Start typing the name of vendor **slowly** and a list of vendors will appear in a drop-down box
 - **CLICK** on the vendor name from drop-down list to select the vendor
 - Check your spelling of the vendor name
 - If it starts with or contains a state name, please search both the full state name ("Tennessee") and the abbreviation (TN)
 - **If the name of the vendor does not show up in list—**
 - Select "New Vendor-USE FOR REQUISITIONS" – delete what you have typed and type **New**
 - For new vendors, type the vendor information in the "Note" selection below
- **VENDOR EMAIL –** (optional) include if you know the email of the vendor
- **TYPE –** select **Purchase Order** (Do NOT select "Check Request")
- **SHIP TO --** Do not use this box
- **ISSUED TO --** Do not use this box
- **AGENT --** Do not use this box
- **PAYMENT TYPE --** Start typing one of the following and then select from drop-down box
 - Credit Card,
 - Invoice, or
 - Pay from Purchase Order
- **APPROVAL PATH --** Choose your department name
- **DATE REQUESTED --** Defaults to current date
- **PERIOD --** Choose the current month from drop-down box
- **ITEM DETAIL(S) --** The next section is where you put the detail of the item(s) or service(s) being purchased. You can add as many times as needed in this section.
 - **Fund Name --** Type the number **"1"** and "General Fund" will appear. Select **General Fund** from drop-down list. There are no other options.
 - **Department Name –** Defines the Campus or entity. Type the number from the list below and *select from the drop-down box.*
 - 1 – Brentwood Campus
 - 5 – Day School
 - 6 – CCF
 - 12 – Trinity Church
 - 14 – The Village Church
 - 0 – For a designated account (accounts that begin with 23xxx)

- **Account Number** – Type GL number *slowly* and *select* the correct account from the drop-down box
 - If you are using a restricted account (beginning with 23xxx), put the name of the project (eg. Christmas in July, Music, Recovery Aid) in the description
- **QTY** – Type the quantity of the item you are ordering
- **UNIT** -- Select an option from the drop-down box
- **DESCRIPTION** -- Type a full description of the item(s) or service(s) being purchased. The box will extend for more typing. *This text appears on the memo line of the check.*
- **PROJECT** -- If you have a project number, start typing the number and the box will show up with your options. Select project from the drop-down to be valid.
- **UNIT PRICE** – This is the dollar amount per unit. This can be an estimated price.
- **AMOUNT** -- This amount will fill in automatically, make sure it matches the total for the item that you expected.

To add another item, complete the fields **Fund Name** through **Amount** for each different item(s) or service(s) to be purchased.
You can add rows if needed.

- **ADD NEW ATTACHMENT** -- If you have a quote, contract or other document related to purchase order request, attach it by clicking these words. It must be a document already scanned into your device.
- **NOTE** -- Type notes you would like the approver(s) or the finance department to see
 - If you selected **New Vendor** in the vendor section, type the name and address for the vendor in this section
- **CLICK UPDATE BUTTON** -- This sends the request to the first approver in the line
 - When UNDER \$500, the request will go directly to the Finance Department
 - When OVER \$500, request will go to your immediate supervisor and then to Finance Department
 - When OVER \$5,000, request will also go to the Department Director (if different from your immediate supervisor) and then to Finance Department
 - Approvals will happen at least every day at 2pm by the Finance Department (but may happen more often)

Once Purchase Order is Approved:

Once approved, you will receive an email with your purchase order number --

- You can now place the order
- Inform the vendor to include the purchase order number on the invoice
- When you receive the invoice, verify that the PO number is on it and turn the invoice into Finance Department
- You can scan and email or drop the invoice in our box in the workroom
- When finance receives the invoice, they will match it to the PO number in the system and process payment

If this is a credit card purchase –

- Bring the PO number to sign out the card
- *The receipt should have the PO number and be returned with the credit card*

In the case of goods being received on-site –

- Submit the packing slip to the Finance Department with your initials indicating that the goods were received and the invoice should be paid

Payment of Invoice via Purchase Order:

Once the invoice is received, it will be matched to the purchase order (and packing slip if appropriate) and paid by the Finance Department.

Invoices received by 2:00p on Tuesday will be paid that week.