

BYU Dining Services

Standard Operating Procedures

BP0017: Purchasing (PRs and POs)

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SOP Collection: [Eatec SOPs](#)
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Accountable Group: Dining Purchasing
Collaborative Business Process

Purpose

This is to outline how Dining Services manages purchases within Eatec. There are two main modules used for purchasing--- Purchase Requests (PR) and Purchase Orders (PO). PRs are for areas that start a shopping list but require additional information or help from a purchasing agent before an order can be placed. PRs are not sent to vendors, rather they are used internally and serve as precursors to POs. A PO is the actual order that is sent to our vendors.

Responsibilities

Area Responsibilities	Centralized Responsibilities
Purchasing Location: <ul style="list-style-type: none"> Create PRs and POs following the process outlined in this SOP. 	Dining Purchasing <ul style="list-style-type: none"> Process any purchase orders that need additional negotiating or shipping. Train employees and answer questions regarding this SOP.

SOP User Guide

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Definitions

Location: This is the area who is placing the order and who should be receiving the item

Delivery Date: When do you need the order delivered?

Deliver To: An optional internal note to help an area know who the order should be delivered to.

Buyer: Auto generated to the user

Override Account Numbers: to manually insert an account code to override where the order is billed

Attention, Reason, Reference: All free text fields for our liking (reference shows up on report, Proposed use for this?)

Remarks: Notes to the vendor (prints on the PO)

Supplier: Dependent on the Load Order Guide toggle switch. See “Load Order Guide” below

Load Order Guide: If you want to load all the items from your bid list onto your PO for a specific supplier, you can toggle the order guide. Most users will not ever use this feature. If you have questions, reach out to Doug Walker.

Bid Region: No options here.

Department (opt.): unique department numbers, we have them but haven't used them extensively for this purpose.

Item Name: The name of the item you want to order

Unit: The Unit size that you are currently ordering

Pack Size: How many items come in that unit

QTY: How many individual units you want to order

Unit Cost: The cost per unit

Estimated Total: The cost for the individual unit multiplied by the quantity

Supplier: The vendor that you are ordering the product from

Supplier Item Number: The vendor’s internal item number for that specific product. This helps our vendors verify that they send us the correct product.

The remaining fields on PO's are optional: QTY RCVD, VALUE RCVD, ALLOCATED CHARGES, REMARKS, SUPPLIER CURRENCY, EXCHANGE RATE, COST/UN (SC), EST. TOTAL (SC), INTERNAL REMARKS, TAX 1, TAX 2, TAX AMOUNT 1, TAX AMOUNT 2, TAX RATE 1(%), TAX RATE 2(%)

Select Supplier: Selecting a Supplier from this field will override all suppliers with items in the cart. It does not show vendors that currently have those items available. We recommend not using this field.

Search (grey field under "Item List"): This will only search for items within your cart. You cannot add new items through this field.

Creating a Purchase Request

Purchase Requests can be viewed similar to saving a "Marketlist" in Legacy Eatec. This allows individuals to save a shopping cart of items that they wish to purchase. Areas would do this when they need additional help from Purchasing to process the PO or they are not ready to place an order but would like to start working on adding items to their cart. PR's cannot be created by starting a PO and saving it as a PR. If you want to create a PR, you must start by following the instructions below.

1. Navigate to Purchase Request

- Click Procurement -> Purchase Request

2. Specify Purchase Request Details

- Enter Location, Delivery Date
- If additional help is required from Dining Services Purchasing, type the word "PURCHASING, Supplier" in the remarks field. For example, 'Purchasing, US Foods'. This is the only way the Purchasing Dept knows their assistance is required. See screenshot below for example
- All other fields are optional, see definitions above.

The screenshot shows the Eatec web application interface. The top navigation bar is blue with the Eatec logo on the left and the text 'Moun' on the right. A left-hand navigation menu lists several options: Dashboard, Masters, Inventory Management, Procurement (highlighted), Purchase Requests, Purchase Order, PR Processing, and Blanket Purchase Order. The main content area is titled 'Purchase Request - Req#8 | Edit Purchase Request'. Below this title is a 'Details' section with the following fields: 'Location*' (a dropdown menu currently showing 'Brigham's Wagon'), 'Bid Region' (a dropdown menu), 'Expense Acct (To Customer)' (a text input field), and 'Remarks' (a text input field containing the word 'Purchasing' with a red underline). Below the 'Remarks' field, there is a character count 'Max 2500 Characters' and '10/2500'.

3. Add items to Purchase Request

- Select the blue carrot symbol ">" on the top right of the screen next to "Item List" to add items to your cart.
- Search specific items by Name, Number, Barcode, and Description in the search bar on the top of the screen.
- The Search right below "Item List" on the left side of the screen will only search items in your cart. You are not able to add items from that search field.
- Once you have added items to your cart, you will need to click on the box under QTY and add the needed quantity to your order.

- Verify Unit, Pack Size, Unit Cost, Supplier, Supplier Item Number,
- You may add items from multiple vendors to a New Purchase Request and you will be able to save individual Request for each vendor separately

4. Process the PR

- Once you have added all the items you would like to order to your cart, select “Post PR” or if you would like to also print off the Purchase Request, you may also select “Print & Post PR” They are the large blue buttons at the top right of your screen.
- If you select the “Print & Post” option, a box will pop up and ask you to select Print. Click on the dropdown and select “RQAFRM” and then click the blue confirm button. You will then be able to print the Purchase Request
- Creating a Purchase Request does not send anything to the Vendor. This is a shopping cart that you can come back to later.

Creating a Purchase Order without a PR

Purchase Orders can be created and sent without creating a Purchase Request (PR) beforehand.

1. Navigate to Purchase Order

- Select Procurement -> Purchase Order -> New Purchase Order

2. Specify Purchase Order Detail

- Enter Location, Delivery Date. Adding remarks are optional but can provide additional information if desired.
- All other fields are optional, see definition section above.

3. Add Items to Purchase Order

- Select the blue carrot symbol “>” on the top right of the screen next to “Item List” to add items to your cart.
- Search specific items by Name, Number, Barcode, and Description in the search bar on the top of the screen.
- The Search right below “Item List” on the left side of the screen will only search items in your cart. You are not able to add items from that search field.
- Once you have added items to your cart, you will need to click on the box under QTY and add the needed quantity to your order.
- Verify Unit, Pack Size, Unit Cost, Supplier, Supplier Item Number
- You may add items from multiple vendors to a New Purchase Order and you will be able to send the PO to each individual vendor once you process the PO.

4. Process the PO

- Once you have added all the items you would like to order to your cart, select “Process PO” It is a large blue button at the top right of your screen.
- Verify all the Details on your order and if all of the Details and the Items List look correct, you click “Post PO” at the top right of the screen.
- Once you “Post PO” and box will appear, and you will have the option to Post the PO to All suppliers (this will send all of the vendors their individual PO’s) or you can only send the orders to selected suppliers)
- Select the option you want and then click “Confirm” and the orders will be emailed automatically to the vendor based on the emails listed within Eatec.
- The box under suppliers must be selected for an email to be sent to that vendor with the PO.

- The boxes under “Submit Approval” do not currently serve a purpose.
 - Emails in the ‘Email Address’ and ‘Alternate Email’ field of the supplier setup will be in the ‘To’ line of the automated email when PO’s are posted. See Supplier SOP for email setup.
 - Emails in the ‘Email CC’ field of the supplier setup will be in the ‘CC’ line of the automated email when PO’s are posted. The buyer’s email (who posted the PO) will also be in the ‘CC’ line. See Supplier SOP for email setup.
 - If a supplier replies to the automated PO email, their reply will be sent to the buyer.

Processing a Purchase Request into a Purchase Order

If a PR was previously created for an order, that PR can be processed into a PO.

1. Navigate to Purchase Orders

- Select Procurement -> Purchase Order -> Right next to the words Purchase order, you will see blue lettering stating “Load Purchase Request”. Select the dropdown and select “Load Purchase Request”. This will pull up all the processed Purchase Requests.

The screenshot shows a software interface with a table of purchase requests. A dropdown menu is open over the table, showing options: 'Load From PO', 'Load Requisition', 'Load Purchase ...' (which is highlighted with a red underline and a blue checkmark), and 'Vendor Punchout'. The table has columns for 'PURCHASE REQUES...', 'DELIVERY DATE', 'EST. TOTAL', and 'APPROVAL STATUS'. The rows contain data for various purchase requests, including 'Blue Line Deli' items with delivery dates ranging from 06/27/2024 to 07/27/2024 and estimated totals from 12.91 to 88.42. All approval statuses are 'Approved' with a green dot icon.

PURCHASE REQUES...	DELIVERY DATE	EST. TOTAL	APPROVAL STATUS
8	07/27/2024	88.42	● Approved ⓘ
7	07/25/2024	49.12	● Approved ⓘ
5	Blue Line Deli	07/10/2024	12.91 ● Approved ⓘ
4	Blue Line Deli	07/10/2024	17.91 ● Approved ⓘ
3	Blue Line Deli	07/10/2024	12.91 ● Approved ⓘ
2	Blue Line Deli	07/10/2024	12.91 ● Approved ⓘ
1	Blue Line Deli	06/27/2024	12.91 ● Approved ⓘ

2. Select a PR to process

- Select the Purchase Request you would like to process into a Purchase Order.
- Continue processing the PO by starting on Step 3 of ‘Creating a Purchase Order without a PR’

Editing Purchase Orders (Change Orders)

Purchase Orders can be edited after they are posted if there needs to be a change to the Purchase Order. Change orders can be completed for every vendor EXCEPT EDI VENDORS (US FOODS, NICHOLAS, SYSCO, COKE/SWIRE). If changes need to be made to an EDI PO, contact the EDI Vendor directly. If changes are made to a non-EDI vendor ensure that the vendor is aware of the change sent and can successfully process the change order.

After the edit is completed, Print and Post the PO

Helpful Hints

- To use Max and Min Pars check the check box on the left side of the line item. Then check on the weight scale on the far right. You can also round up to whole numbers from the same page.
- Switching between bids for a specific item can be done within a PR or a PO. Be sure to click into the supplier field until the information icon is shown to the right of the supplier's name. Click on the icon and you will be able to switch between vendor bids.

<input type="checkbox"/>	ITEM NAME	SUPPLIER	SUPPLIER IT...
<input type="checkbox"/>	<input checked="" type="checkbox"/> CHICKEN Cordon Bleu 4 oz ⓘ	Sysco Intermountain ⓘ	1624329 Sysco Intermountain

Select Supplier

Bids Lookup		Global Suppliers Lookup				
Supplier List (2)						
SUPPLIER	NUMBER	UNIT	PACK SIZE	PRICE	POST DATE	
Sysco Intermountain	1624329	Case	36	40.85	12/07/2024	
US Foods (28707)	5664347	Case	36	44.21	12/08/2024	

- You can customize your PO grid and save your desired preferences (order of columns, removing columns, etc.)
- A common error that will appear will say “Please map a supplier for each item”. If this occurs one of the PO items does not have a supplier. Find the line item missing a supplier and add a supplier.
- The check boxes on the left side of line items will only affect using suggested quantities (min and max) and for activating the trash can icon that will allow you to remove items from a PO.
- Delete an item> Select the item -> Click on Trash can icon on the right side.
- You cannot save a “marketlist” from the NEW PO field. You must start off with a Purchase Request. Ordering from an MRP needs to be done in the Purchase Request field. That will allow the area to save a “cart” and process as a PO later.
- There is an optional feature called the ‘Yellow Box’ that allows the user to see past transaction data when selecting quantities on a PO. BYU currently has this function turned off, but if you believe your area would find this useful, please contact Doug Walker.

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