

Year End Quick Guide: Order Entry

Information outlined in this document is also available in SOP-PURCH-22. [Click here to review the SOP.](#)

Locating Orders

Orders expiring at the end of the Fiscal Year 20 (FY20), June 30, that will still be needed in Fiscal Year 21 (FY21), July 1 and onward, must be entered as soon as possible. Multi-year recurring orders that extend past June 30 do not need to be re-entered. If you are unsure of what action you should take, contact Purchasing at purhelp@iu.edu or use the [Who Buys What page](#) to locate a contract manager.

Locate orders expiring at the end of FY20 using the advanced Purchase Order (PO) search with the following criteria:

Search parameter	Description
Prepared by	<i>Optional.</i> Enter usernames in this field to return POs owned, or established, by that individual.
Account-SubAccount	Enter the funding account used to fund the PO. Search for additional accounts by clicking "Add Another Account-SubAccount."
Org	Enter the chart and org (ie, UA-PUR) to return POs funded by accounts associated with that org. Search for multiple orgs by clicking "Add Another Org." Enter "2020."
PO End Date Year	<i>Note: If "2020" was not entered in this field when the order was established, this search parameter should not be used. If you use this parameter and the search yields no results, remove it and search again.</i>
Recurring Payment?	Select "Yes/True" from the drop-down menu.

BUY.IU returns a list of POs which meet your criteria. Click on a PO number to view order details.

Copy & Update an Order

Navigate to the requisition by clicking View Related Documents in the upper left-hand corner of the PO, then View. On the requisition, select Copy to New Cart in the Document Actions menu.

BUY.IU copies the requisition, excluding comments and attachments. Review and update the following criteria:

In the Shopping Cart

Click Save to save your changes.

- **Cart Name:** Enter a cart name which reflects what is being purchased. This field is visible to document approvers and searchable in BUY.IU.
- **Refresh supplier:** Select all order lines, then select Change Supplier from the action menu and click Go. Click Supplier Search and search for the supplier. Select the appropriate fulfillment center. Review Distribution Method and update *if necessary and instructed by supplier*.
- **Product Description and Price Estimate:** Click more info... next to Product Description. Review Product Description. If establishing a blanket purchase order enter "BPO" at start of Product Description. Update Price Estimate field, if needed, to increase or decrease value of order.

In the Requisition

Unless otherwise instructed, click edit in the upper right-hand corner of the requisition to make changes to a section. Click Save to save your changes.

- **General:** Check the box next to Order Restricted? if your order involves the following: contracts, supplier-provided or established by Purchasing, sourcing, quotes, or bids. Update the Special Circumstances field if your order is related to COVID, the bicentennial, or building remediation.
- **Shipping:** Review the shipping section to ensure this information is still accurate. This is where goods will be sent.
- **Accounting Codes:** Click Select from all values... under the Fiscal Year category and select 2021. Update other accounting information as needed. Review order lines for line-item level accounting info. If the order is only one line, remove accounting information from the line-item level.
- **External Notes and Attachments:** Upload attachments which must be sent to the supplier along with the PO. Click edit to add a short message which appears on the PO.
- **Recurring Payment:** Update PO Begin Date Year field to 2020 and PO End Date Year field to 2021. Update Previous PO# field with previous PO number. **Ensure box under Recurring Payment? is checked.**
- **Comments:** If you have submitted a contract request form, enter the contract request form name and number in a comment for Purchasing's review. Upload any supplemental documentation, such as a supplier-provided contract or other agreement which requires review/signature, for review by Purchasing and approvers.
- **Final Review:** Review the information entered on the requisition prior to submitting the order.

Once the steps outlined above are complete, click Place Order at the top of the page to submit the order for review. **You are not able to edit the document after it has been submitted.**

New Order Entry

Many recurring orders are entered year after year. However, if you are establishing a recurring order for the first time, pay special attention to the following:

- **Review the supplier record:** Search for the supplier in BUY.IU prior to entering your order. Review the supplier's fulfillment centers, and use a [Supplier Edit Request form](#) to request the addition of a new fulfillment center. If the supplier you need is not available in BUY.IU, request it using the [Non-Catalog Order \(Purchase Order\) Supplier Request form](#).
- **Request sourcing or quotes:** Quotes and bids are requested by Purchasing. For them to know to take these steps, the order must be completed in a specific way. Review the [Request Sourcing or Quotes documentation](#) to learn more about when sourcing is required and how to request it from Purchasing.
- **Blanket orders:** A blanket order is a type of recurring order which sets aside a pool of funds for miscellaneous purchases for a period, usually a fiscal year. In this situation, the details of what is being purchased are not important. The only concern is how much is being spent. When establishing a blanket order, enter "BPO" at the start of your Product Description to ensure proper invoice processing.
- **Complete Recurring Payment section:** To establish a recurring order, at a bare minimum the box under "Recurring Payment?" in this section **must be checked**. This impacts the document's routing, receipt requirements, and invoice routing. Do not miss this step! Additionally, complete the PO Begin and PO End fields to locate orders expiring soon.

FY21 purchase orders will be released by Purchasing on July 1. This process is not automatic. POs will be distributed in batches over the course of the day.