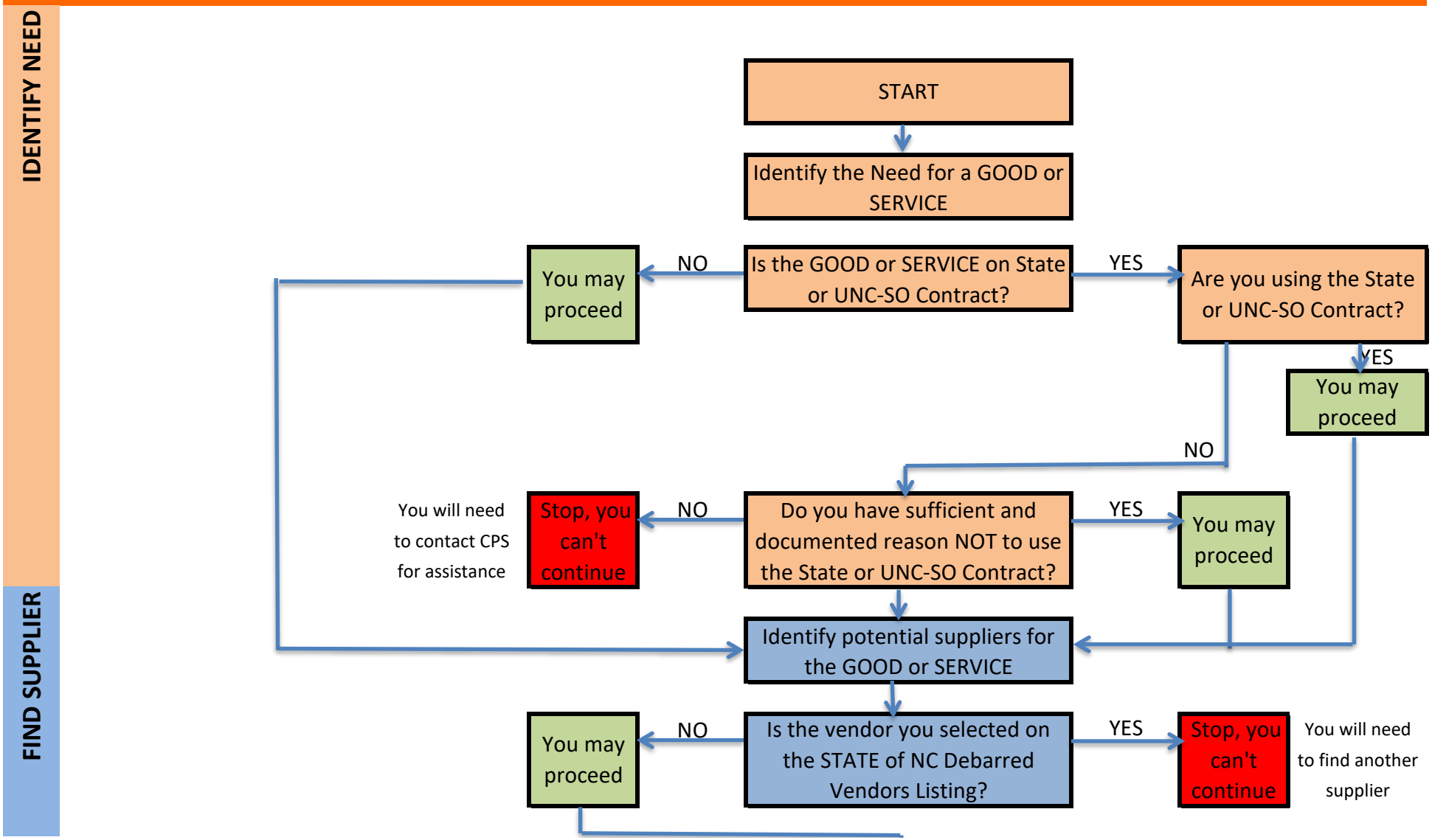
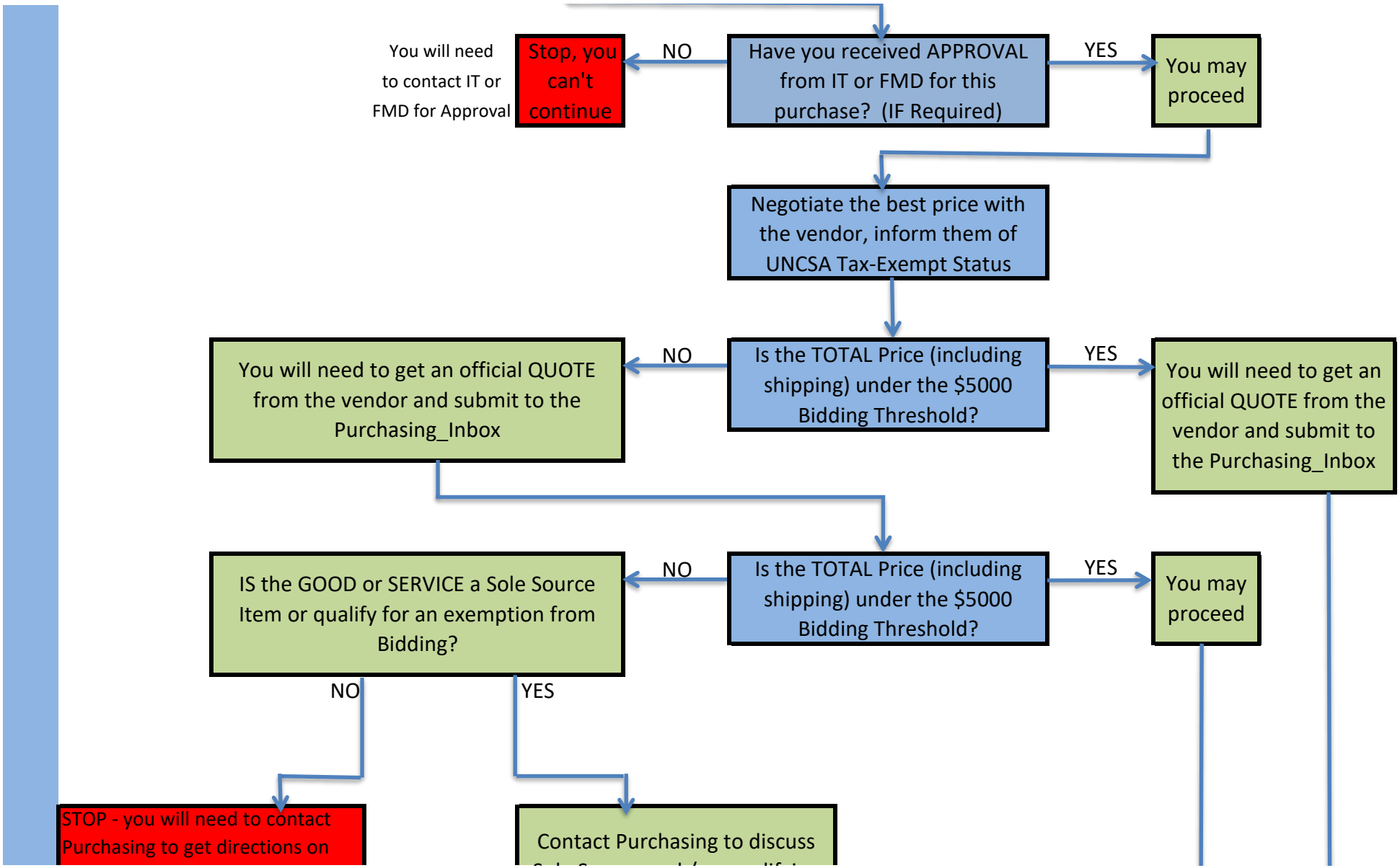
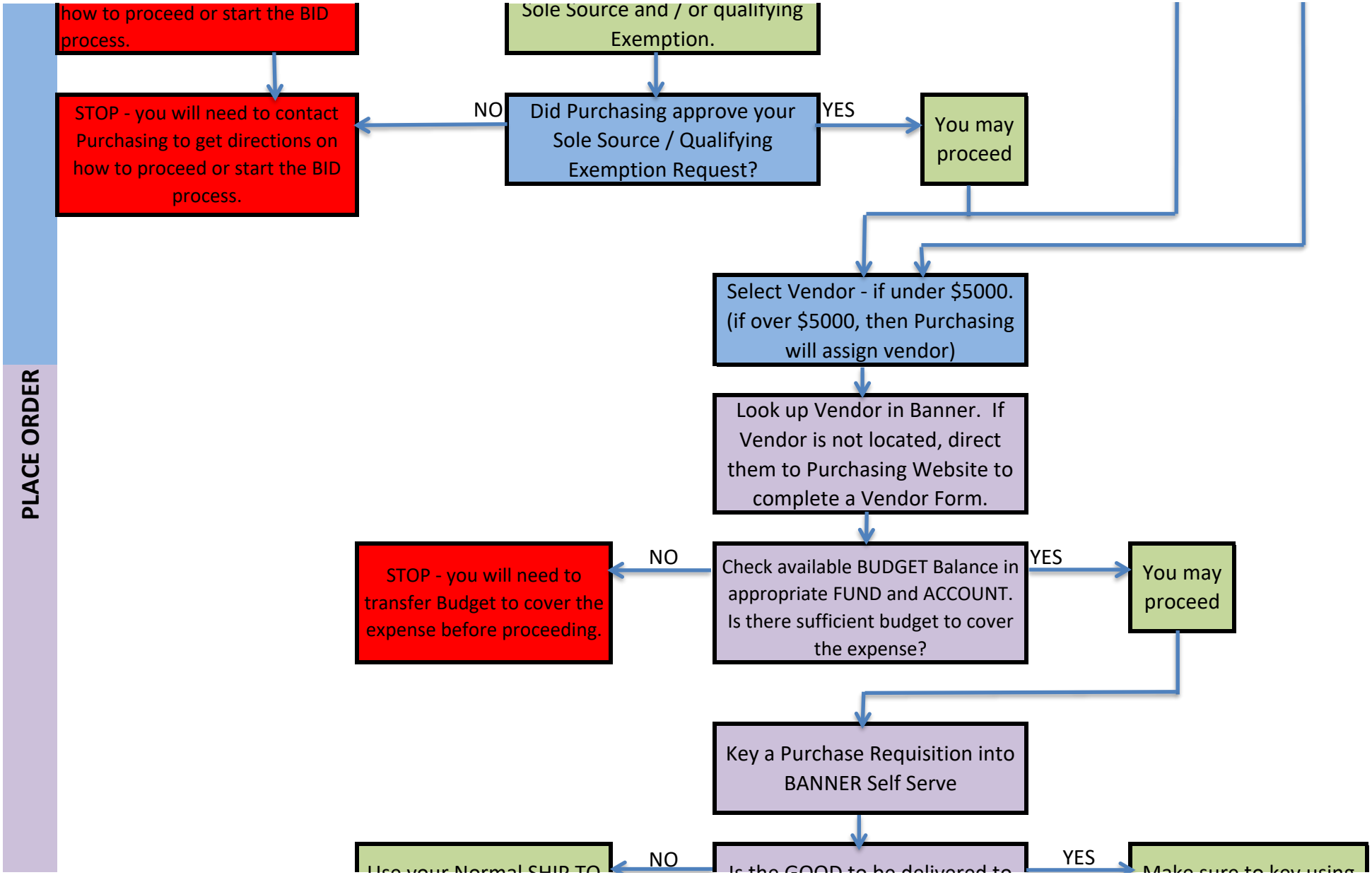
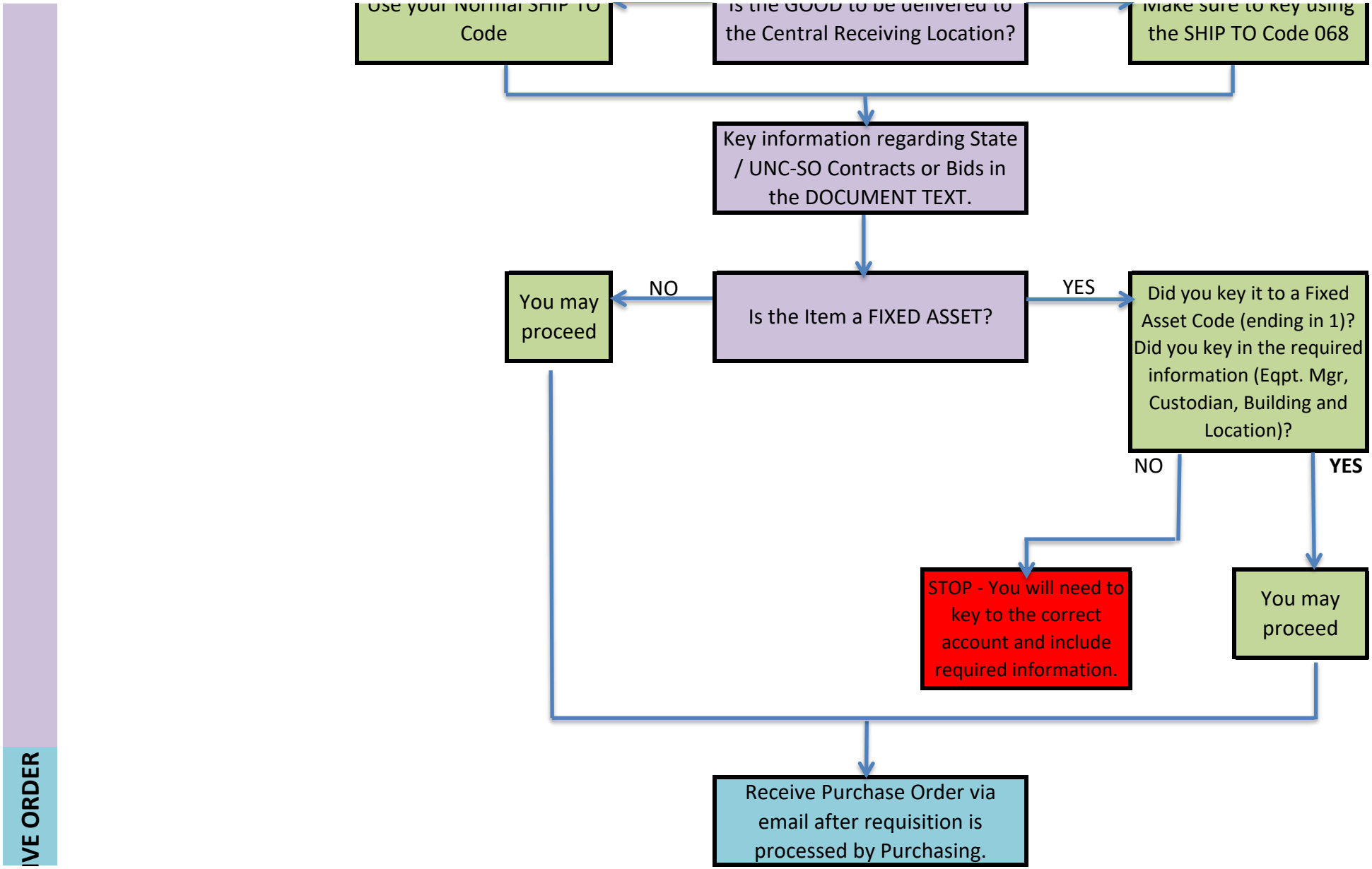
Purchase Order Flow Chart




Have you received APPROVAL from IT or FMD for this purchase? (IF Required)
NO
Stop, you can't continue
You will need to contact IT or FMD for Approval
YES
You may proceed
Negotiate the best price with the vendor, inform them of UNCSA Tax-Exempt Status
Is the TOTAL Price (including shipping) under the $5000 Bidding Threshold?
NO
You will need to get an official QUOTE from the vendor and submit to the Purchasing_Inbox
YES
You will need to get an official QUOTE from the vendor and submit to the Purchasing_Inbox
Is the TOTAL Price (including shipping) under the $5000 Bidding Threshold?
NO
IS the GOOD or SERVICE a Sole Source Item or qualify for an exemption from Bidding?
YES
You may proceed
NO
YES
STOP - you will need to contact Purchasing to get directions on
Contact Purchasing to discuss


PLACE ORDER
how to proceed or start the BID process.
Sole Source and / or qualifying Exemption.
STOP - you will need to contact Purchasing to get directions on how to proceed or start the BID process.
NO
Did Purchasing approve your Sole Source / Qualifying Exemption Request?
YES
You may proceed
Select Vendor - if under $5000. (if over $5000, then Purchasing will assign vendor)
Look up Vendor in Banner. If Vendor is not located, direct them to Purchasing Website to complete a Vendor Form.
STOP - you will need to transfer Budget to cover the expense before proceeding.
NO
Check available BUDGET Balance in appropriate FUND and ACCOUNT. Is there sufficient budget to cover the expense?
YES
You may proceed
Key a Purchase Requisition into BANNER Self Serve
NO
YES


IVE ORDER
Use your Normal SHIP TO Code
Is the GOOD to be delivered to the Central Receiving Location?
Make sure to key using the SHIP TO Code 068
Key information regarding State / UNC-SO Contracts or Bids in the DOCUMENT TEXT.
Is the Item a FIXED ASSET?
NO
You may proceed
YES
Did you key it to a Fixed Asset Code (ending in 1)? Did you key in the required information (Eqpt. Mgr, Custodian, Building and Location)?
NO
YES
STOP - You will need to key to the correct account and include required information.
You may proceed
Receive Purchase Order via email after requisition is processed by Purchasing.

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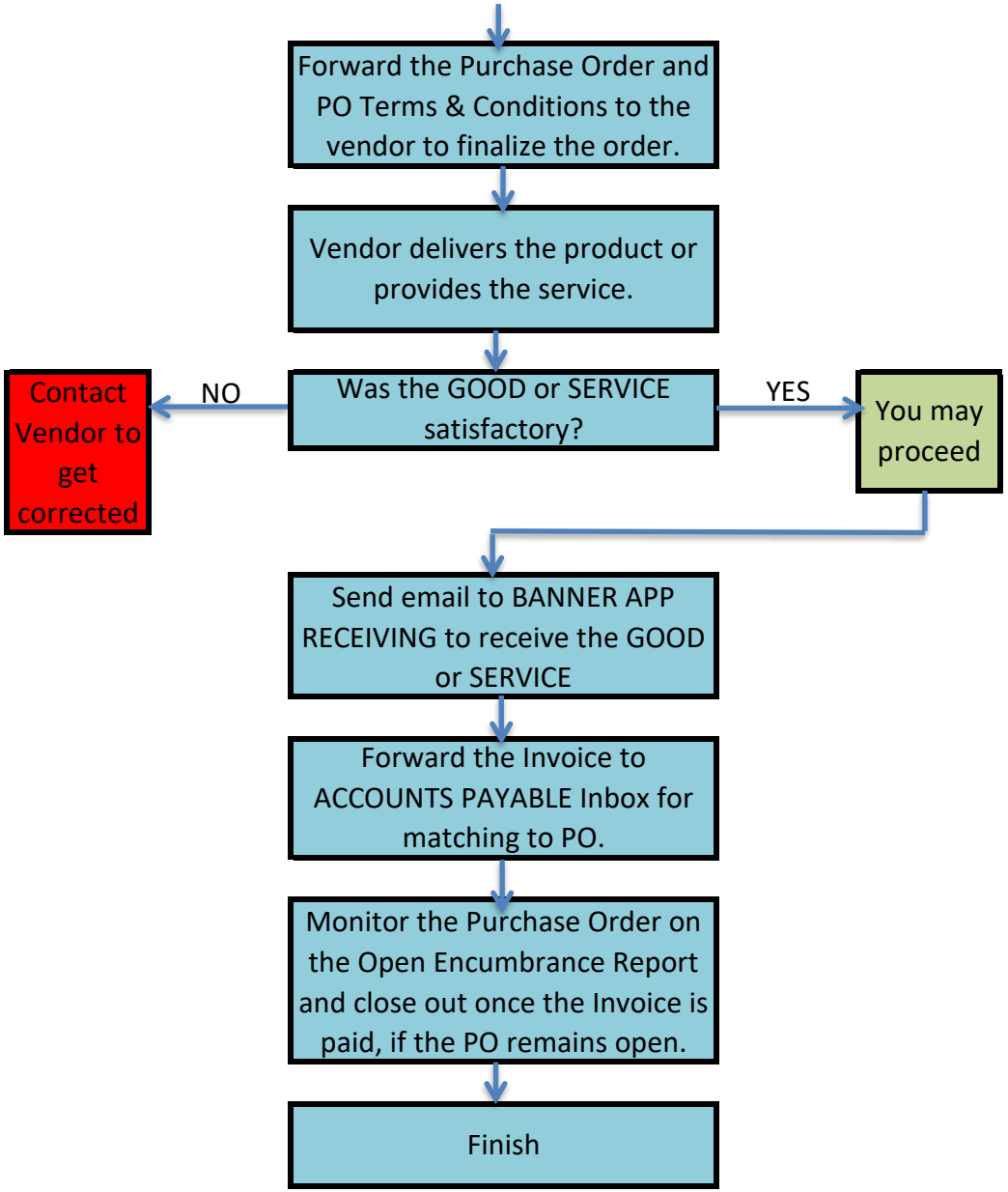
Forward the Purchase Order and PO Terms & Conditions to the vendor to finalize the order.
Vendor delivers the product or provides the service.
Was the GOOD or SERVICE satisfactory?
NO
Contact Vendor to get corrected
YES
You may proceed
Send email to BANNER APP RECEIVING to receive the GOOD or SERVICE
Forward the Invoice to ACCOUNTS PAYABLE Inbox for matching to PO.
Monitor the Purchase Order on the Open Encumbrance Report and close out once the Invoice is paid, if the PO remains open.
Finish