

# Purchasing & Contract Services Department

## FAQs

### 1. What if the supplier is not in PeopleSoft? How do I obtain a Supplier ID? What is the process for entering a supplier into PeopleSoft?

To establish a new supplier, a requester/initiator/end user who reviews the existing database in PeopleSoft and does not find the supplier must first send the blank District's Supplier Intake form and IRS form W-9 to the new supplier for completion.

The completed and returned forms are sent back to the requester/initiator/end user for final review for completeness and input into the PeopleSoft supplier database. (Input by the requester/initiator/end user)

After input, notification is sent to Purchasing, who will review the data and approve or deny (with comment).

After approval, the supplier may be used when drafting a requisition.

For instructions on how to set-up a supplier in PeopleSoft, please refer to the step by step tutorial that starts on **page 5** of the PeopleSoft User Manual for Purchasing.

### 2. What if the supplier is a consultant?

If the supplier is a consultant, then the consultant will need to be set up in PeopleSoft. The consultant will need to complete the Consultant or Lecture Agreement which can be obtained under Forms at <http://busssrv.sdccd.edu/purchasing/forms.cfm>. Once the agreement is signed by the consultant, the end-user shall send one **blue inked (original signature)** agreement to the assigned Buyer for signature. The Buyer will then obtain final signature from the Purchasing Supervisor and e-mail the fully-executed agreement back to the end-user to upload to the requisition. **See Section 6-7 below for the AOPO process.**

### 3. When requesting a quote, does the shipping or freight need to be included?

When quoting, a supplier shall add 'freight' or 'shipping' as a separate line.

- ❖ Shipping/freight is not taxable
- ❖ Shipping and Handling is taxable.

Shipping may be estimated by the quoting supplier and may actually be a different amount on an invoice as opposed to the original quote.

If a supplier does NOT include shipping on their quote it is presumed by the requester/end user there is not separate shipping cost and the supplier is delivering under the FOB Destination terms of ownership.

When shipping is part of an invoice which is not stated as part of a prior quote

- ❖ this may require a change order in order to pay the invoice.
- ❖ this may have an impact on your budget
- ❖ this may delay payment, adding steps and revision of existing documents must necessarily be performed by the requester.

Please clarify BEFORE the supplier provides a quote whether a shipping charge will occur.

### 4. I am drafting a requisition, when can I expect a purchase order to be issued (dispatched) to the supplier?

Completed requisitions must first go through an approval cycle. Pre encumbrance budget check will also occur to verify fund availability for this anticipated purchase.

The respective Buyer will then review for accurate and complete description, proper category code, tagging information (if an asset is being purchased), quote attachment and clarification comment. Final location/destination for delivered items must be stated.

Approval by the Buyer will cause the requisition to move into the purchase order queue.

Denial by the Buyer will move the requisition back to the requestor. The Buyer must add appropriate comments, identifying why the requisition was rejected.

The purchase order queue lists those purchase orders ready for dispatch.

The Buyer is charged with performing an encumbrance budget check, review of the purchase order content and prioritization of issuance (dispatch) of each purchase order. Order complexity, lead time and shipping elements are just some factors when developing a priority system.

Buyers perform other tasks as part of their responsibilities. Solicitation issuance, troubleshooting, negotiation, process enforcement and customer service are but a part of the Purchasing Department's role.

Therefore requesters and end users should plan accordingly when initiating a requisition and also have a reasonable expectation as to when the Purchase Order will be issued to the supplier and when ordered items will arrive.

#### **5. How do I enter a requisition?**

Please refer to the step by step tutorial regarding requisitions that starts on **page 15** of the PeopleSoft User Manual for Purchasing.

#### **6. Whom do I contact if I am having trouble entering a requisition into PeopleSoft?**

Each campus has a direct resource in their respective Business Services Office. Please contact them for assistance. All other departments contact the Purchasing and Contract Services Department.

#### **7. Where do I attach supporting documentation (i.e., quotes, etc.)?**

All supporting documents are to be attached as one single attachment to Line 1 of the requisition. Please refer to **page 30** of the PeopleSoft User Manual for Purchasing.

#### **8. How do I create a Blanket Purchase Order?**

Blanket Purchase Orders are now called "**Amount Only Purchase Order (AOPO)**" with the implementation of PeopleSoft. Please refer to the step by step tutorial on how to enter a requisition as an Amount Only requisition that starts on **page 28** of the PeopleSoft User Manual for Purchasing.

#### **9. Can I create an Amount Only requisition for supplies?**

**Amount Only** (AOPO) orders are intended for renewals, maintenance service agreements, rentals, professional services, and subscriptions/memberships. AOPO orders should not be used for the purpose of tangible product purchases.

#### **10. How can I see if a requisition has been approved?**

A confirmation will be emailed to the requestor once the requisition is final and approved. To check the status of the requisition in PeopleSoft, drill down into the Manage Requisitions screen. Enter the **Requisition ID** or **PO ID** number and click search. To access **Manage Requisitions**, use the following navigation: **Main>Menu>Financials 9.2>eProcurement>Manage Requisitions**. Click the gray triangle to the far left under Req ID to expand the details of the requisition.

#### **11. How do I check the balance on an Amount Only PO?**

To check the balance of an AOPO in PeopleSoft, use the following navigation: **Main Menu>Financials 9.2>Purchasing>Purchase Orders>Review PO Information>Purchase Orders**. Click on the **Activity Summary** and a new window will open that provides the activity against the PO.

## 12. How many lines can a requisition have?

A requisition should have a maximum of 25 line items.

### 12A. What happens if I have more than 25 lines?

If your requisition exceeds 25 line items, please create multiple requisitions for the order. You can notate "requisition 1 of xx" in the **Requisition Comments and Attachments** field on the requisition page. This information will transfer to the supplier as long as you check the boxes "send to supplier."

## 13. How should I enter the description for each line item?

The **ARMA format will be required** to approve requisitions. To ensure that orders are processed, please follow the **ARMA Rules on pages 51 and 52** of the PeopleSoft User Manual for Purchasing. If you have further questions, please contact the **Central Distribution Center at 619-388-1180**.

## 14. The supplier has not received my Purchase Order, what should I do?

First, check the status in **Manage Requisitions** to make sure the Purchased Order has been dispatched. If the PO has been dispatched, please contact the supplier to verify the email address. Next, contact the Purchasing Department and request that the purchase order be re-sent to the supplier. **(NOTE: A valid email address is required in PeopleSoft in order for the Purchase Order to be dispatched to the supplier).**

If the email address is incorrect, please complete a **Supplier Intake Form** which can be found at <http://busssrv.sdccd.edu/purchasing/forms.cfm> and email it to [supplierintake@sdccd.edu](mailto:supplierintake@sdccd.edu) indicating the change **(This email address should not be given to suppliers)**

## 15. What end user contact information is needed on requisitions?

The end user's name, email address, and location are required.

## 16. If a supplier gives me an agreement to sign, what should I do?

Any agreements requiring signature should be forwarded to the assigned Buyer. Please be sure to provide an email address for the signed agreement to be returned. Agreements are not valid until they are signed by the Purchasing & Contract Services Supervisor.

## 17. Why does purchasing change the supplier that the department entered on the requisition?

The District is obligated to purchase goods and services from Board awarded District authorized suppliers. This should result in a cost savings to the District.

## 18. Does the supplier get a copy of the Purchase Order?

Yes. All PO's are issued via email. All suppliers must have a current email address in PeopleSoft within the supplier database.

## 19. How do I process a Change Order?

All changes to a purchase order must be initiated by the end-user at the requisition level. This allows for review and workflow approvals. Once approved and processed, the PO will then be updated and sent back to the supplier. Please refer to the step by step tutorial for end users regarding change orders that start on **page 36** of the PeopleSoft User Manual for Purchasing.

## 20. What happens if the supplier delivers directly to the requestor?

All goods should be delivered to the campus **Stockrooms/Central Distribution Center**. End users must notify receiving within **48 hours** of receipt of goods.

End users should not accept delivery; instead re-route the supplier to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be done through the Distribution Center. Ensure that the Ship To location is identified on the requisition as the Central Distribution Center.

Please note that if the items ordered are oversized/heavy in nature, this information should be included on the initial purchase requisition so that Purchasing & Contract Services can add special notes for the driver to coordinate delivery with the end user.

As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center to notify them that the order has been received. For a list of receiving contacts per location, please refer to **page 35** of the PeopleSoft User Manual for Purchasing.

**21. What should the requestor do if they do not receive an item that was purchased?**

The end user/requestor should look up the Purchase Order number; then contact the supplier to see if the item(s) were shipped. Next, the end user should obtain the tracking number from the supplier and track the order.

If the item(s) were delivered, the requestor will need to contact the appropriate Stock Room/Central Distribution Center to acknowledge receiving.

**22. What is the process for returns and Exchanges?**

See Returns & Exchanges Policy at: <http://busssrv.sdccd.edu/purchasing/employees.cfm>.

**23. What is a Confirmation Order?**

Purchases that have been initiated and processed by an end-user without a purchase order are **"ILLEGAL."** The District cannot be held liable for purchases made without a purchase order. All purchases **MUST** have an assigned purchase order number issued by the Purchasing & Contract Services Department prior to making a purchase. If a purchase is made without a PO, the payment cannot be made. **Potentially the end user can be made financially responsible for any order placed without a District authorized purchase order.**

In the rare instance a Confirmation Order is allowed, a justification form will be used to complete the transaction. Contact the Purchasing & Contract Services department to request the form to be used. Please refer to **page 60** of the PeopleSoft user Manual for Purchasing to review the form.

We welcome and encourage participation in this FAQ section! Please email us with questions at [purchase@sdccd.edu](mailto:purchase@sdccd.edu)