
Purchasing and OK Corral Training





Purchasing Training Agenda

Purchasing Overview

- ✓ Purchasing Policy
- ✓ Revising purchase orders
- ✓ Closing purchase orders

Purchasing Procedure

- ✓ How to shop
- ✓ Create Carts/requisitions
- ✓ Copy Carts

Invoice payment procedures and how to complete a cost receipt in Ok Corral.

- ✓ Sign and date the invoice
- ✓ Make sure the PO # is on the invoice
- ✓ Create a cost receipt in Ok Corral
- ✓ Turn invoices in for payment into Accounts Payable SL 125A.
- ✓ If it is a punch-out purchase and product has been received complete a cost receipt. That notifies the Business Office that the invoice is ready for payment.
- ✓ Invoices need to be paid in a timely manner. We have 30 days to pay an invoice but sometimes we receive a discount if we pay sooner.



Bidding Requirements

Purchases ranging from \$10,000.01 to \$25,000 will require formal bidding to be conducted by OPSU OPSU Purchasing Coordinator or the Departmental requester who will request bids and complete this process for OPSU. If you have specifications for the purchase or suggested vendors to be contacted for bids, please include this information on your requisition including a phone number, fax number, and email.

Purchases ranging from \$25,000.01 and above will require formal bidding to be conducted by OSU Office of Central Procurement who will request bids and complete this process for OPSU. If you have specifications for the purchase or suggested vendors to be contacted for bids, please include this information on your requisition including a phone number, fax number, and email to the vendor "subject to bid".



Purchasing Definitions

Step 1. **Requisition** – request for goods or services made by an employee to a company (By Requisitioner). Quote must be attached.

Step 2. **Purchase Order** – legal document a buyer sends to a supplier to authorize a purchase (Issued by OPSU following completion of proper approvals)

Step 3. **Receipt** – document that goods or services have been received (By requisitioner or purchaser)

Step 4. **Invoice** – itemized list of goods shipped specifying the price and terms of sale (Turned in for payment by requisitioner/purchaser and paid by OPSU Accounts Payable)



Purchasing Process and Procedures

The steps listed below must be done before anything can be ordered:

Check first to make sure the vendor is in OK Corral by doing a supplier search. If they are not in OK Corral, check with OPSU Purchasing to do a search in the system. Sometimes vendors need to be reactivated in OK Corral if they have not been used in it recently. If this is a new vendor, request a W9, addresses, phone and fax numbers, and email address and complete the Vendor Request Form in OK Corral.

[New Vendor Request Instructions](#)



Purchasing Process and Procedures

Completely fill out the requisition - This can be done online using OK Corral, unless you are using a club account (i.e. fund beginning with a 9). Clubs and organizations must use a paper requisition and include the sponsor's signature and one officer's signature. Paper requisitions are available in the Business Office.

It is very important to put your **department fund number** on the requisition.

The items or services you are requesting must be included in detail on the requisition based on your quote. Be as descriptive as possible on each line item. Simply writing "see attached quote", is not appropriate. Enter the quantity, catalog number, and description of exactly what you are requesting. Be sure to include the unit price and total price. Do not forget to include the shipping or freight charges this will be under a different commodity as the following:

Commodity	Account
Communications and Utilities	706100
Telephone, Shipping Services, Postage, Cell Phone, Utilities	Freight Expenses



Purchasing Process and Procedures

When applicable **bidding requirements have been met** and after the above steps have been completed, the requisition will go through the proper approval process before it will be created into a purchase order. Please keep in mind you must have adequate budget in your fund and expense account, or your requisition will be returned back to you. If you have questions regarding your budget, please contact the Purchasing Coordinator.

Once the purchase order is completed, you can place your order with the vendor. **Purchase orders are automatically distributed** upon completion to the vendor's preferred email or fax number. **Do not place the order before receiving the Purchase Order!** You could be liable for the purchase if these procedures are not followed. The Purchasing Coordinator will not confirm the order; the requestor may confirm the order once the purchase order is received.



OK Corral Homepage

<http://www.okcorral.okstate.edu/>

OK CORRAL All Search (Alt+Q) 0.00 USD 19 10

Simple Advanced Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order Browse: Suppliers | Categories | Contracts | Chemicals

Search for products, suppliers, forms, part number, etc.

★ MESSAGE BOARD ★

The Oklahoma State University and A&M Central Procurement Office has been awarded the prestigious 24th Annual Achievement of Excellence in Procurement® (AEP) for 2019 from the National Procurement Institute, Inc. (NPI).

Northern Safety Punchout NEW

The Office of Central Procurement is proud to announce the release of a NEW punch-out in the OK Corral for Northern Safety. By using the new punch-out, departments will be able to take advantage of contracted pricing and invoicing. As an OK Corral

Procurement Resources and OK Corral Support

- OKLAHOMA A&M COLLEGES Procurement Guidelines
- OK CORRAL OK Corral Guides
- OK CORRAL Punch-Out Guides
- OKLAHOMA A&M COLLEGES Resources & Forms
- OKLAHOMA A&M COLLEGES Procurement Staff

Contracts Available to OSU and the A&M System - Links to External Websites

- OKLAHOMA A&M COLLEGES Contracts / OSHOP
- State of Oklahoma Contracts
- E&I Cooperative Services E&I Cooperative Contracts
- DIR Texas DIR Contracts

Office and Business Supplies

- STAPLES OSUA&M-





















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OK Corral Homepage

<http://www.okcorral.okstate.edu/>

Punch-Outs do not require quotes as we have a state contract with them

STAPLES OSUA&M-OFFS-001371-2022					
PRIME Scientific Lab Supplier & Lab Equipment (Fisher Scientific is the PRIME supplier and all available items should be purchased through Fisher Scientific) ▼					
 OSUA&M-LAB-000207-2017					
Information Technologies, Computers, and Accessories ▼					
 CONTRACT #: 96ADV	 VSA-H-OK-149	 STATE CONTRACT: C2020-5			
Other Scientific Lab Supplies, Lab Equipment, and Related Services (To be used only when the items are NOT available from Fisher Scientific) ▼					
 ESI CONTRACT CNR01362	 OSUA&M-LAB-000208-2017	 OSUA&M-LAB-000205-2017	 OSUA&M-LAB-000206-2017	 OSUA&M-LAB-000209-2017	 OSUA&M-LAB-000381-2018
 2017.10.21.OSU . J-1.2	 OSUA&M-LAB-000202-2017	 CONTRACT: ESI # CNR0133	 CONTRACT: ESI # CNR01457		
Maintenance, Repair, and Operations (MRO) Supplier ▼					
 ESI CONTRACT: CNR01248	 State Contract: SW817	 STATE CONTRACT: SW817	 OMNIA CONTRACT: 16154	 R1920XX	
Audio Visual and Supplies ▼					
 ESI CONTRACT: CNR01341					



Shopping for Non-Catalog Items

OK CORRAL All Search (Alt+Q) 0.00 USD 19 10

Simple Advanced Go to: **Non-Catalog Item** Favorites Forms Shop Quick Order Browse: Suppliers Categories Contracts Chemicals

Search for products, suppliers, forms, part number, etc.

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- DIR Texas DIR Contracts

Office and Business Supplies

- STAPLES OSUA&M-

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Search for vendor: Click on + to select

The screenshot displays a software interface for adding a non-catalog item. A modal window titled "Supplier Search" is open, showing a search bar with the text "Panhandle Printing Llc" and a magnifying glass icon. To the right of the search bar is a "Clear All Filters" button. Below the search bar, the search results are displayed under the heading "Name". The results show "Panhandle Printing Llc" with a yellow "+" button next to it, indicating it is the selected vendor. Below the company name, the address is listed: "PO Purchase Order 1: Hi-Plains Sports 315 Ne 4th St Guymon, Oklahoma 73942-4838 United States". A "Cancel" button is located at the bottom right of the modal window. The background shows the "Add Non-Catalog Item" form with fields for "Existing Supplier", "Item", and "Additional Details".



**Enter Description, catalog number, quantity, price, and packaging.
Are there more items? If so, select save and add another.
If not, select Save.**

Add Non-Catalog Item ✕

Existing Supplier

Panhandle Printing LlC ✕ 🔍 Panhandle Printing LlC ✕

Fulfillment Address ∨ **Distribution Methods** ➤

PO Purchase Order 1 - Hi-Plains Sports, 315 Ne 4th St, Guymon, Oklahoma 73942-4838 United States

Item 6 items have been found containing 'N/A' in their Catalog No. [View all in search results](#) ∨

Description ★	Catalog No. ★	Quantity ★	Price	Packaging
HOMECOMING BANNERS 236 characters remaining	N/A	5	200.00	EA - Each ∨

Additional Details ∨

Manufacturer Name Manufacturer Part No

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive

★ Required fields

Save **Save And Add Another** **Close**



View Cart left to right. Cart #161178275
Supplier, description, catalog, price, quantity and ext. price.
Proceed to checkout.
Do not assign.

OK CORRAL Home Shop Orders Contracts Accounts Payable Suppliers Sourcing Reporting

Shopping Cart • 161178275

1,000.00 USD

Assign Cart **Proceed To Checkout**


Simple Advanced

Search for products, suppliers, forms, part number, etc.

5 Items

Panhandle Printing Llc • 5 Items • 1,000.00 USD

SUPPLIER DETAILS

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1  HOMECOMING BANNERS	N/A	EA	200.00	<input type="text" value="5"/> EA	1,000.00

ITEM DETAILS

Details

For: Carol Hill

Name: TRAINING -HOMECOMING BANNERS

Estimate (1,000.00 USD)

Total: 1,000.00



Once you enter Save,
the amount will appear in your cart below.

OK CORRAL All Search (Alt+Q) 1,000.00 USD

Simple Advanced Go to: [Non-Catalog Item](#) | Favorites | Forms | Shop | Quick Order Browse: [Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Go to: non-catalog item

Search for products, suppliers, forms, part number, etc.

★ MESSAGE BOARD ★

Achievement of Excellence In Procurement®
2019 Award Winner

The Oklahoma State University and A&M Central Procurement Office has been awarded the prestigious 24th Annual Achievement of Excellence in Procurement® (AEP) for 2019 from the National Procurement Institute, Inc. (NPI).

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Office and Business Supplies

- STAPLES OSUA&M-

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<https://solutions.sciquest.com/apps/Router/Home?tmstmp=1660548986896>



Complete from left to right. Click on the little pencils.

OK CORRAL

Requisition • 175639276

All Search (Alt+Q) 1,000.00 USD 41 1,014

Assign Cart Submit Requisition

Summary PO Preview **Comments** Attachments History

General	Shipping	Billing
Cart Name 2023-08-15 karendl 01	Ship To	Bill To
Description no value	Attn: Karen Bauer Room/Blg Sewell 125B Dept Purchasing Coordinator OK Panhandle State Univ 323 W EAGLE BLVD GOODWELL, OK 73939 United States	Okla Panhandle State Univ Accounts Payable 580-349-1578 PO BOX 430 Goodwell, OK 73939 United States
Requester Karen Bauer	Delivery Options	Credit Card Info
Priority Normal	Expedite <input checked="" type="checkbox"/>	No credit card has been assigned.
Shopper Karen Bauer	Ship Via Best Carrier-Best Way	Billing Options
Employee Family Owned Business <input checked="" type="checkbox"/>	Requested Delivery Date no value	Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.) no value <input checked="" type="checkbox"/> Required
Non Tax-Exempt <input checked="" type="checkbox"/>		Received Purchasing approval prior to submitting requisition for next fiscal period. <input checked="" type="checkbox"/>
Purchasing Contact no value		
Original Bid or Contract # no value		
Bid Code no value		
Campus Code no value <input checked="" type="checkbox"/> Required		
Board Approval no value		
Contract For Signature Attached <input checked="" type="checkbox"/>		
Selling Goods or Services? <input checked="" type="checkbox"/>		
Cost Match Invoices Only? <input checked="" type="checkbox"/>		

Summary **Draft**

- Correct these issues.**
 - You are unable to proceed until addressed.
 - Required: Campus Code
 - Required: Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)
 - Required: Chart
 - Required: Fund
 - Required: Commodity
 - Required: Account

Total (1,000.00 USD)	
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.	
Subtotal	1,000.00
	1,000.00

What's next for my order?

Next Step: Fiscal Catch-All

Approver: Johnson, Kyle

Workflow: ...

Draft
Active



Name your cart.
Change your cart name from the default name to help identify your purchase. Be sure to click Save.

Edit General [Close]

General

Cart Name *

Description

Requester Karen Bauer

Priority

Shopper

Employee Family Owned Business

Non Tax-Exempt

Purchasing Contact

Original Bid or Contract #


Bid Code

Campus Code *

★ Required fields



Verify or create in the Shipping column

Shipping  ...

Ship To

Attn: Karen Bauer
Room/Blg Sewell 125B
Dept Purchasing Coordinator
OK Panhandle State Univ
323 W EAGLE BLVD
GOODWELL, OK 73939
United States

Delivery Options

Expedite

Ship Via **Best Carrier-Best Way**

Requested Delivery *no value*
Date



Be sure to select the correct Fiscal Year.

Bill To ★

CURRENT ADDRESS ↻

Contact Line 1	Okla Panhandle State Univ	<input type="checkbox"/> Add to my addresses
Contact Line 2	Accounts Payable	
Contact Line 3	580-349-1578	
Address Line 1	PO BOX 430	
City	Goodwell	
State	OK	
Zip Code	73939	
Country	United States	

OK Panhandle State Univ - Okla Panhandle State Univ , Accounts Payable , 580-349-1578 , PO BOX 430, Goodwell, OK 73939, United States ★

Search additional Results Per Page 10

Credit Card Info

Billing Options

Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.) ★ 24

- 16
- 17
- 18
- 19
- 20
- 21
- 22
- 23
- 24

★ Required fields



Chart: P

Fund: 1xxxxx or 320xxx

Commodity

Account

Requisition • 175639276

[Assign Cart](#) [Submit Requisition](#)

Summary PO Preview Comments Attachments History

Services?

Cost Match Invoices Only? ✗

PO Distribution Bypass ✗

Accounting Codes

Chart	Fund	Commodity	Account
no value 	no value 	no value 	no value

Internal Notes and Attachments

Internal Note	Internal Attachments
no value	Add
PO Type	no value
Work Order #	no value
Phase #	no value

PO Clauses

PO Clauses [4 Edit | View details](#)

5 Items

Summary

Draft

Correct these issues.
You are unable to proceed until addressed.

- Required: Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.)
- Required: Chart
- Required: Fund
- Required: Commodity
- Required: Account

Total (1,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,000.00
	1,000.00

What's next for my order?

Next Step: Fiscal Catch-All



Fund: 1xxxxx or 320xxx

Custom Field Search ✕

1-7 of 7 Results 20 Per Page ▼

Value ↑	Description	
110115-P	Vp Business	+
110125-P	Business Office	+
130105-P	Ag Business	+
130202-P	Business Administrat	+
130205-P	Dean of Business	+
320385-P	Business Office	+
320522-P	Xcel Business Techno	+

1-7 of 7 Results 20 Per Page ▼



Commodity and Account

Edit Accounting Codes



Accounting Codes

Chart *	Fund *	Commodity *	Account *
P - Oklahoma Panhandle State University	110125-P	Services, Printing and Binding - Services, Printing and Binding	708010 - Print&Bind Serv/Con

Required fields

Required: Commodity



Commodity and Subaccount Guide

Commodity and Subcodes

Commodity and Subcodes

No.	Commodity	Notes	Subcode Range	Valid Subcodes
1	Bldgs Constructn/Renov/Rental	Construction, Renovations, Renewals and Replacement, Space Rental, Land Purchase	4500-4771	4500, 4510, 4600, 4610, 4620, 4700, 4710, 4760, 4761, 4765, 4770, 4771, 4400
2	Communications and Utilities	Telephone, Shipping Services, Postage, Cell Phone, Utilities	6100-7007	6100, 6120, 6122, 6124, 6126, 6128, 6200, 6300, 6350, 6400, 6450, 7001, 7002, 7003, 7004, 7005, 7006, 7007
3	Computer Hardware		3902-4400	3902, 3952, 4001, 4202, 4232, 4262, 4302, 4341, 3718
4	Computer Software and Services	Includes Software under \$500	3150, 3901-4400, 8100-8110	31501, 4050, 4100, 4342, 8100, 8110, 3725
5	Equipment Rental	Machine and Equipment Rental Services	8050-8075	8050, 8060, 8065, 8070, 8071, 8075, 9264
6	Equipment, Construction		3910-4400	3910, 3962, 4006, 4212, 4242, 4272, 4312



Expense Account Codes

Expense Account Codes

OSU Expend. Subcode	State Object Code	Subcode Description	Object Code Description
<u>SUPPLIES AND MATERIALS</u>			
<u>OFFICE SUPPLIES</u>			
703010	3416	Printing Supplies	Printing-Supplies and Materials (e.g. paper stock, offset plates, inks, etc.)
703020	3613	Non-Expendable Office Supplies (<\$500)	Office Supplies, Non-Expendable—Include type items such as letter trays, wastebaskets, desk staplers, etc., which are less than \$500 and not immediately expendable. May also include inexpensive office equipment / furniture type items costing less than the above limit.
703030	3614	Expendable Office Supplies	Office Supplies—Include stationary, file folders, notebooks, columnar pads, carbon paper, etc.
<u>COMPUTER AND DATA PROCESSING SOFTWARE SUPPLIES</u>			
703100	3615	Data Processing Supplies	Data Processing Supplies—Include ribbon, disks, toner cartridges, etc. This does not include the purchase of new software.
703150	4113	Software under \$500	Data Processing Software—Purchase of software used in data processing.
<u>INSTRUCTIONAL AND EXTENSION SUPPLIES</u>			
703300	3619	Educational Supplies	Educational Supplies—Payment for purchase of supplies used for education and training conducted in a classroom or other organized instructional setting. May also include payments for purchase of supplies used for education and training for the general public (e.g. information binders, covers, jackets, notebooks, etc.)
703350	3623	Examination Supplies	Purchase of Examinations—Include examination materials purchased for processing of job applications or promotions of employees. Include payment of fees associated with administering tests by third party.
703360	3716	Agriculture and Veterinary Supplies	Agricultural and Veterinary-Supplies—Payments for purchase of feed and forage for farm or laboratory animals and purchase of veterinary medicines, supplies and services used for the care and keep of such animals. Also payments for the purchase of seeds, bulbs, plants, trees and fertilizer used on institutional dairies; and farm/ranch/agriculture supplies (e.g., halters, rope, hay forks, cinch ties, clippers, etc.) used in operation of a ranch/farm type facility.
703370	3617	Food Items	Food items – not intended for consumption – used in conducting meetings, conferences, training, instruction, or outreach and sponsored by an outside entity. (Only for use on sponsored agreements.)
703371	3617	Food Items	Food items – food items needed for instruction, extension, or outreach not specifically intended for refreshment, but possible consumption to test food safety and sponsored by an outside entity. (Only for use on sponsored agreements.)



Assign Cart to Karen when you have addressed all the **RED** items. Please be sure to attach your quote to your requisition before assigning your cart.
Never attach an invoice to a requisition.

Requisition • 175639276 Assign Cart Submit Requisition

Summary PO Preview Comments Attachments History

General	Shipping	Billing
Cart Name Panhandle Printing 2023-08-15 karendl 01	Ship To	Bill To
Description Homecoming Banners FY24	Attn: Karen Bauer Room/Blg Sewell 125B Dept Purchasing Coordinator OK Panhandle State Univ 323 W EAGLE BLVD GOODWELL, OK 73939 United States	Okla Panhandle State Univ Accounts Payable 580-349-1578 PO BOX 430 Goodwell, OK 73939 United States
Requester Karen Bauer	Delivery Options	Credit Card Info
Priority Normal	Expedite ✗	No credit card has been assigned.
Shopper Karen Bauer	Ship Via Best Carrier-Best Way	Billing Options
Employee Family Owned Business ✗	Requested Delivery Date no value	Fiscal Year (Prior Purchasing approval required if selecting next fiscal year.) 24 2024
Non Tax-Exempt ✗		Received Purchasing approval prior to submitting requisition for next fiscal period. ✗
Purchasing Contact no value		
Original Bid or Contract # no value		
Bid Code no value		
Campus Code P Panhandle State		
Board Approval no value		
Contract For Signature Attached ✗		
Selling Goods or Services? ✗		
Cost Match Invoices Only? ✗		

Summary Draft

Total (1,000.00 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	1,000.00
	1,000.00

What's next for my order?

Next Step: Fiscal Approval

Approvers: McMurphy, Elizabeth Stover, Kari

Workflow

- Draft** Active Karen Bauer
- Banner Budget Authorization Future
- Fiscal Approval Future
- Administrative Approval 3



**A completed job will appear as below.
Please write down your requisition number.**

Simple Advanced Go to: [Non-Catalog Item](#) | [Favorites](#) | [Forms](#) | [Shop](#) | [Quick Order](#) Browse: [Suppliers](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Search for products, suppliers, forms, part number, etc.

✓ Requisition 161497587 Submitted

Summary		Options	
Requisition number	161497587	Print	
Requisition status	Pending	Recent orders	
Cart name	BANNER TEST CART	Return to your home page	
Requisition date	8/17/2022		
Requisition total	1,000.00 USD		
Number of line items	1		

**Please note, the requisition will be pending until all approvers have approved it.
Once approved, you will receive an email stating it is a purchase order.**



Before any invoices can be processed:

1. Create and assign requisition
2. Purchase order to complete workflow to issue Purchase Order
3. Create a receipt

The screenshot displays the OK Corral procurement portal. At the top, the header includes the 'OK CORRAL' logo, a currency selector set to '0.00 USD', and notification icons for 19 items and 10 users. Below the header, there are navigation tabs for 'Simple' and 'Advanced', and a 'Go to:' menu with options like 'Non-Catalog Item', 'Favorites', 'Forms', 'Shop', 'Quick Order', 'Browse: Suppliers', 'Categories', 'Contracts', and 'Chemicals'. A search bar is located on the right side of the header. On the left, a vertical navigation menu contains icons for home, shopping cart, clock, award, building, people, magnifying glass, and bar chart. The main content area is divided into several sections: 'Procurement Resources and OK Corral Support' featuring links for 'Procurement Guidelines', 'OK Corral Guides', 'Punch-Out Guides', 'Resources & Forms', and 'Procurement Staff'; 'Contracts Available to OSU and the A&M System - Links to External Websites' with links for 'OSU / OSHOP', 'State of Oklahoma Contracts', 'E&I Cooperative Contracts', and 'Texas DIR Contracts'; and 'Office and Business Supplies' featuring a 'STAPLES' link. A sidebar on the left contains a 'Quick search' bar and a dropdown menu with options: 'All Orders', 'Requisitions', 'Purchase Orders' (highlighted in yellow), 'Procurement Requests', 'Invoices', and 'Receipts'. Below the sidebar, there is a news article titled 'Northern Safety Punchout' with a 'NEW' badge, and another article mentioning 'The Oklahoma State University and A&M Central Procurement Office has been awarded the prestigious 24th Annual Achievement of Excellence in Procurement® (AEP) for 2019 from the National Procurement Institute, Inc. (NPI).'



Invoices and Receipting Receipts

In order for an invoice to be paid the following steps must be taken:

Non-catalog Purchases:

1. Invoice received from vendor

2. Shopper/authorized person in department verifies invoice is okay to proceed for payment by creating a **cost receipt** in OK Corral
 1. Service have been provided
 2. Items ordered have been received
 3. If the purchase order has multiple lines be sure you are receipting the proper lines and amounts to match the invoice.

3. Shopper/authorized person in department then writes down the **cost receipt number** on the invoice along with their signature and date.

4. Then they will take the invoice to Accounts Payable for payment.



Invoices Receipting Receipts

Punchout's (example: Staples, Dell, Career Tech)

1. Invoice received from vendor
2. Shopper/authorized person in department verifies invoice is okay to proceed for payment by creating a **cost receipt** in OK Corral
 1. Service have been provided
 2. Items ordered have been received
 3. If the purchase order has multiple lines be sure you are receipting the proper lines and amounts to match the invoice.
3. Shopper/authorized person in department then writes down the **cost receipt number** on the invoice along with their signature and date. Then they will take the invoice to Shalom, Accounts Payable for payment. **Only need to do this step for Career Tech. Ashlee will put invoice in your box.**



**A purchase order can be found by name of vendor
or by purchase order (i.e. P1205967)**

UI elements: All, Search (Alt+Q), 0.00 USD, 19, 10, Logout

Save As, Pin Filters, Export All

Type of Order: Purchase Order, Created Date: All, NAIA, Add Filter, Clear All Filters

*Campus Code: Is Equal To:P - ...

Page 1 of 3, 1-20 of 48 Results, 20 Per Page

Order	Order	Created	Completed
-------	-------	---------	-----------

A purchase order can be found by name of vendor or by P number.



**Search for your Purchase order
so that you can create
a Cost Receipt**





Search for your Purchase order so that you can create a Cost Receipt

Type of Order: Purchase Order ▾ Created Date: All ▾ P1335947 ✕ 🔍 ?

*Campus Code: Is Equal To:P- ... ▾ ✕

1-1 of 1 Results

Type of Order: Purchase Order ▾ Created Date: All ▾ P1335947

- Purchase Order
- Invoice
- Receipt
- Requisition

Apply Cancel

Type	Order Status
Purchase Order	Complete

You can specify your search by requisition as well



Create a cost receipt to indicate products or service has been received.

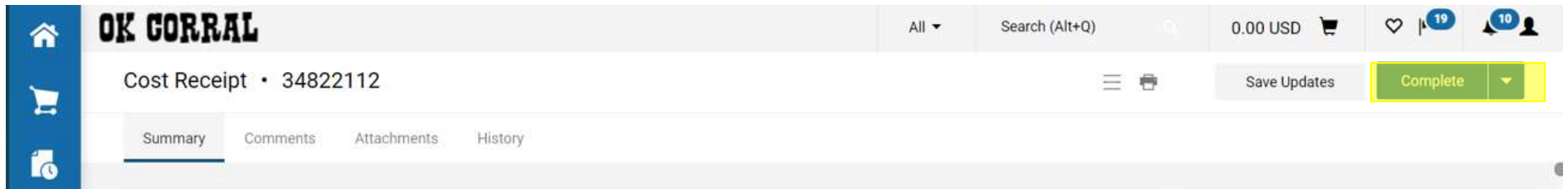
The screenshot shows a software interface with a navigation bar at the top containing tabs: Status, Summary, Revisions (2), Confirmations, Shipments, Receipts (highlighted), Invoices, Comments (1), Attachments (1), and History. Below the navigation bar, there is a section titled 'Records found: 0' with the text 'There are no receipts for this PO.' To the right of this section, there is a '+ sign' button. A dropdown menu is open from this button, showing two options: 'Create Quantity Receipt' and 'Create Cost Receipt'. The 'Create Cost Receipt' option is highlighted with a yellow box.

Receipting is done as the following:

- Click into the Purchase Order
- Click Receipts
- Click the + sign under Receipt tab
- Select Create Cost Receipt and only Cost Receipt



Once the amounts are valid and in their correct line,
you are to click Save Updates
and then Complete.



**Please write your Cost Receipt number on your
signed invoice before turning in your invoice to
Accounts Payable to process for payment.**



Payment of invoices

After you have received your products and/or services, you should receive an invoice to pay the vendor. When submitting your vendor invoices to Accounts Payable, please be sure to:

- 1) Sign your name and date as having received the merchandise/services. Reference a purchase order number if it is not already on the invoice.
- 2) Complete a receipt in OK Corral and write the receipt number on the invoice.
- 3) After everything is attached, turn in to Accounts Payable in SL 125-A for payment.



Purchasing Card Program (P-card)

- The p-card may be used if the vendor will not accept checks as long as it abides by the [Purchasing Card Policy](#)
- P-card is issued by OPSU in coordination with Bank of America
- Cardholders must be OPSU permanent, full-time employee (with the exception of head coaches)
- Liability for payment and total responsibility and accountability for the p-card resides at the departmental level.
- If you are issued a purchasing card, you will receive the p-card training by the Purchasing Coordinator.

For Questions or Budget Transfer
submissions, please email:

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For this PowerPoint or resources, visit
our webpage:

<http://www.opsu.edu/Offices/Business/>