

BusinessPlus
Punch Out with MiPeer POUPPP Screen

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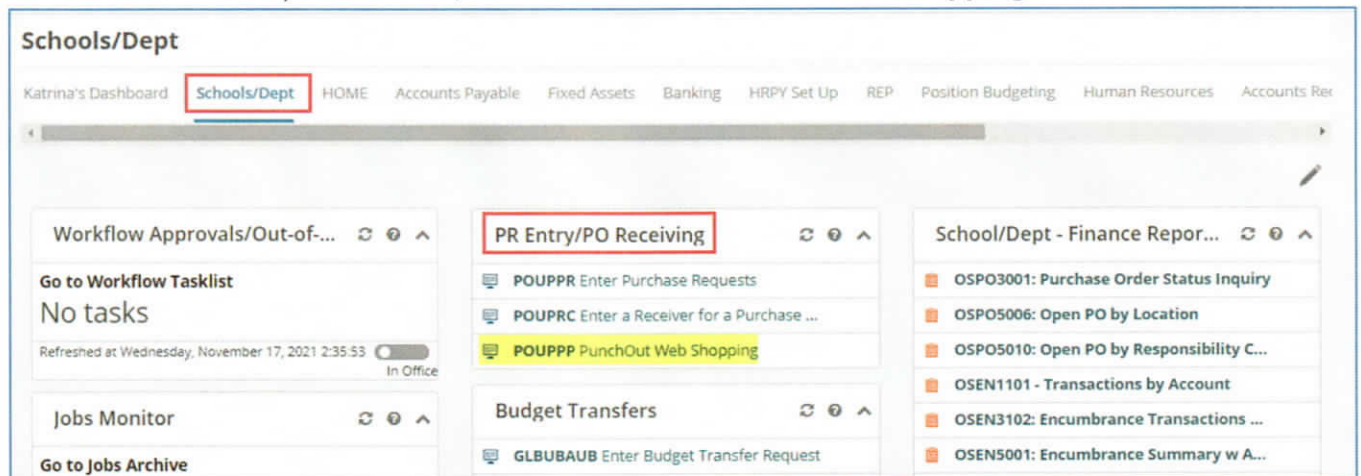
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Overview

This document is intended to provide instruction for entering punch out purchase requests that will later be assigned a purchase order number and electronically sent to the vendor. Each district determines which vendors to set punch out with so the provided vendor screen shots are intended to serve as an example only. While the vendor's websites will vary, they generally function the same.

Entering a Punch Out Purchase Request

- From the Schools/Dept dashboard, click **POUPPP 'PunchOut Web Shopping'**





- Before clicking the vendor's shopping link, complete the following (see **1** in screen shot below):
 - Enter or Lookup the **Account number** to charge the items to,
 - Enter the three-digit **Ship To ID** where the goods will be shipped,
 - If necessary, change the **PO Security Code**

BusinessPlus PunchOut Web Shopping (POUPPP)

Clear

Punch Out Vendors

Shop	Vendor ID	Vendor Name
	002149	SCHOOL SPECIALTY
	002229	STAPLES ADVANTAGE

In 20.11 Accounts can be looked up for Punch Out orders!
Place the cursor in one of the account components, click the ellipsis and then **Lookup Account**

Finance Defaults

Account * GL FUND FUNC PROG GRNT LOC RESP Obj

Ship To ID: Ship To Addr:

Product Code: Security Code: 100

Tax Code: Warehouse:

Fixed Asset?

Note: Un-click the Show Job Ledger Side to remove unnecessary fields









Lookup OBJ
Lookup Account
GL Fully Qualified
GL Org Key-Object
GL Quick
Show Ledger
Show Job Ledger Side

- Click the **Shop** link to the respective vendor's website (see 2 in screen shot above). Users will be directed to the vendor's website.
- Select the items to purchase and add items to a cart.
- Submit order to BusinessPlus. Vendors generally have similar steps to review the cart and then transfer the order into BusinessPlus though some may have multiple steps to do so. Vendor sites often use terms like 'View Cart', 'Checkout', 'Submit Order' or 'Transfer Order' or any such variations.

Total \$93.78 **Submit Order**

4 items in cart

Delivery

	Redi-Tag Page Flags, Assorted Colors, 0.47" Wide, 125/Pack (31118) Item #: 512663 MFR #: 31118 Delivery by Tuesday, Jun 07, 2022	<input type="text" value="5"/>	\$2.29 125/PK	\$11.45	 Remove
	TRU RED™ File Folders, 3-Tab, Letter Size, Assorted Jewel Tone Colors, 100/Pack (TR58172) Item #: 24416348 MFR #: TR58172 CN #: 24416348 Delivery by Tuesday, Jun 07, 2022	<input type="text" value="2"/>	\$20.82 100/PK	\$41.64	 Remove
	Post-it® Super Sticky Notes, 4" x 6", Playful Primaries Collection, Lined, 90 Sheets/Pad, 3 Pads/Pack (660-3SSAN) Item #: 562881 MFR #: 6603SSAN CN #: 562881 Delivery by Tuesday, Jun 07, 2022	<input type="text" value="2"/>	\$5.60 3/PK	\$11.20	 Remove
	Swiffer Dusters Blend Refills, Yellow, 11/Box (99035) Item #: 2728773 MFR #: 99035 Delivery by Tuesday, Jun 07, 2022	<input type="text" value="1"/>	\$29.49 11/BX	\$29.49	 Remove

- The Purchase Request (PR) will automatically be created for the items selected in BusinessPlus. It is recommended that the user complete the **Ship ATTN To** field (see below).



NOTE: Account numbers are the only thing that can be changed on a punch out PR or PO line item. Items cannot be added or deleted.

- Click the pencil to Edit the record.

PR Number	PO Number	Vendor Name	PR Total	Requested By	Vendor ID	Status	PO Ty	Date Requested
R2200511		STAPLES BUSINESS ADVANTAGE	93.78	Katrina Brunette	000803	PR	P	06/06/2022

- Complete the **Ship ATTN To** field with person, department or room number to whom goods should be sent.



NOTE: Do **NOT** use any punctuation or special characters (@%*) in this field!

PR Number*: R2200511 PO Number: Status*: PR Security Code: 120

Approval Code: Requested By: Katrina Brunette Date Requested: 06/06/2022

PO Total: 0.00 PR Total: 93.78

Vendor ID: 000803
STAPLE00

Vendor Name: STAPLES BUSINESS ADVANTAGE

Vendor Addr Code: R1
PO BOX 660409
DALLAS, TX 75266-0409

Phone Cd: Ship To ID: 120
BURTON ELEMENTARY





Ship To Addr Code: PR
26315 SCOTIA RD
HUNTINGTON WOODS, MI
48070

Ship ATTN To: ART ROOM 102

Details

PO Type*: P Blanket Amt: 0.00 Rm: 0.00

9. If an account number must be changed or split, click on the **Edit pencil** to the left of the line item and make the necessary changes.

Item Num	Quantity	Units	Unit Price	Extended Am	Description	Account	
 0001	1.00	BX	29.49000	29.49	Swiffer Dusters Blend Refills, Yellow	GL 110-111-0000-0000-120-0120-55110000	Y
 0002	2.00	PK	5.60000	11.20	Post-it Super Sticky Notes, 4" x 6",	GL 110-111-0000-0000-120-0120-55110000	Y
 0003	2.00	PK	20.82000	41.64	TRU RED File Folders, 3-Tab, Letter	GL 110-111-0000-0000-120-0120-55110000	Y
 0004	5.00	PK	2.29000	11.45	Redi-Tag Page Flags, Assorted Col	GL 110-111-0000-0000-120-0120-55110000	Y

10. To change the account number, type over the existing one or place the cursor in one of the account number fields, click the ellipsis and select **Lookup Account**.

Item Account Number

Item Description
Swiffer Dusters Blend Refills, Yellow, 11Box (99035)

[+ Add Account](#) Switch to: [Amount](#) Total: 100.00% Remaining: 0.00%

Account	Percent
GL 110 111 0000 0000 120 0120 55110000	100.00

Delete

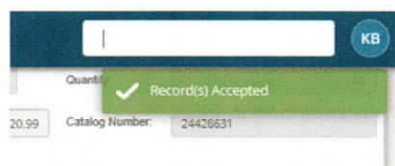
Split Accounts Example

[+ Add Account](#) Switch to: [Amount](#) Total: 100.00% Remaining: 0.00%

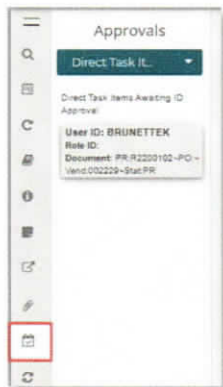
Account	Percent
GL 110 111 0000 0000 120 0120 55110000	50.00
GL FUND FUNC PROG GRNT LOC RESP OBJ	50.00

Delete Delete

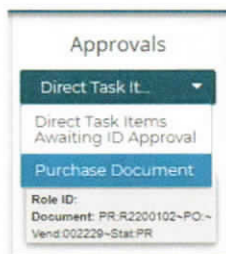
11. After entering the **Ship ATTN To** field or making account number changes, press **Enter**. The **Record Accepted** message will display.



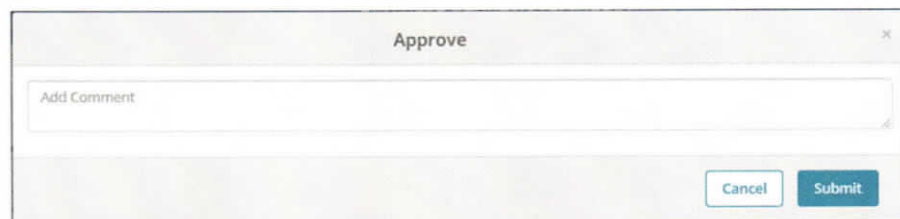
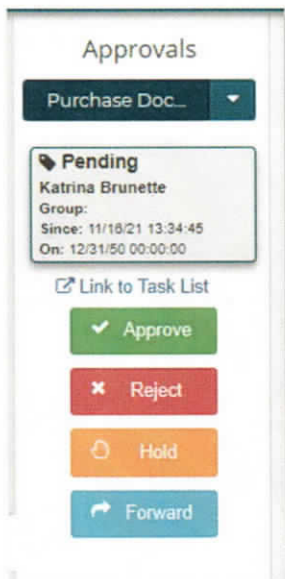
12. Go to the **Workflow** side menu option to submit the record into workflow.



13. Click the drop down and select **Purchase Document**.



14. Click **Approve** to submit the record into workflow and then **Submit**. The record will route for approvals. Upon final purchasing/business office approval, the order will electronically be sent to the vendor and the creator of the purchase request and the purchasing department will receive an email with the PO attached.



15. Once the goods have been received for the punch out order, **receiving is required** in order for invoices to be paid.

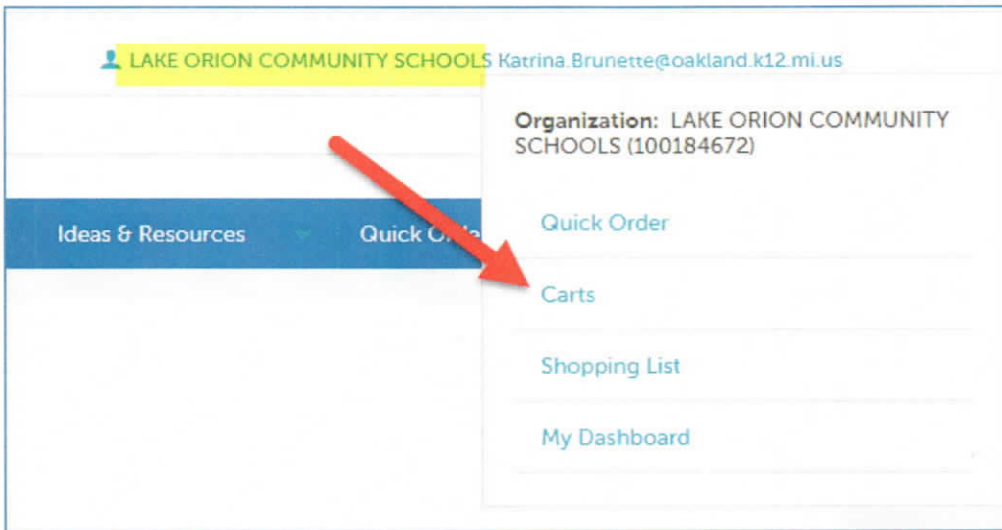
Changes to a Punch Out Purchase Order

Only changes to the account numbers may be completed for punch out orders. Line items may not be deleted or added.

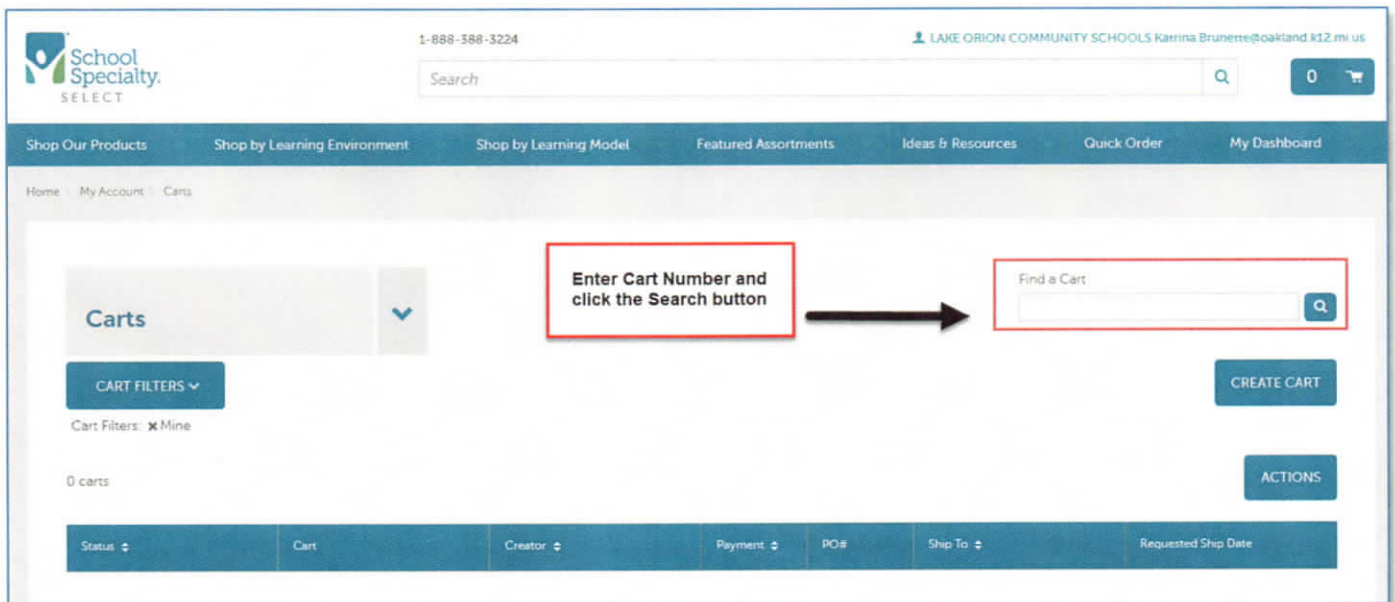
How to Retrieve a Cart Someone Else Entered from School Specialty

Districts may be set up to allow teachers to enter a cart direct in the School Specialty website. This set up must be coordinated between your Business Office and School Specialty. This will review how the cart can be retrieved from BusinessPlus Punch Out.

1. From BusinessPlus, punch out to the School Specialty website
2. Click on the district name and select **Carts**



3. Enter the **Cart Number** you wish to retrieve and click the search button



- Review the order. Once confirmed the cart is the one you were looking for, click **Transfer**. Process the order as you would a regular punch out order.

Cart #1015967868 NicksJen (30 items, \$115.33) #1015967868

Cart #1015967868 ('NicksJen') | Awaiting Transfer | 01/31/2022 Print Download

Cart Status Awaiting Transfer

Order Summary

Order submitted by customer service representative

Subtotal	\$115.33
+ Estimated Tax	\$0.00
+ Shipping	\$0.00
Total	\$115.33
You Save	60% (\$176.17)

Cart Transfer

Comment

Enter a comment about the approval or rejection of this cart.

