

Procure to Pay

9.2 PantherSoft Financials

The **Procure to Pay** process begins with submitting a **Requisition** for goods/services in PantherSoft via the eProcurement navigation. There are TWO ways to shop for goods and services. The first, and the option you will want to ALWAYS choose first, is through the **myFIUmarket** and use the supplier's catalogs. These vendors and all the items in their catalogs have been pre-approved for FIU purchasing. Your turn around time for ordering the goods will be much faster. When your Requisition is approved it will source right to a Purchase Order.

When what you are shopping for is **not** available in **myFIUmarket**, then use "**Special Requests – Create a Non-Catalog Request**". Enter all the required information into a blank Requisition form – the item, supplier, accounting, etc.. After it's been approved, the requisition automatically routes to a buyer to be sourced to a Purchase Order.

Once the goods/services are received, the department must create the **Receipt** in PantherSoft.

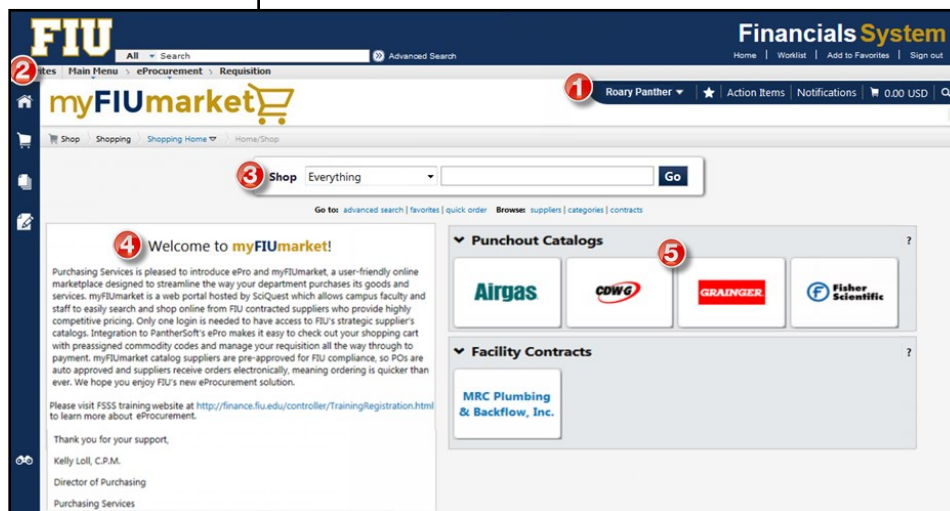
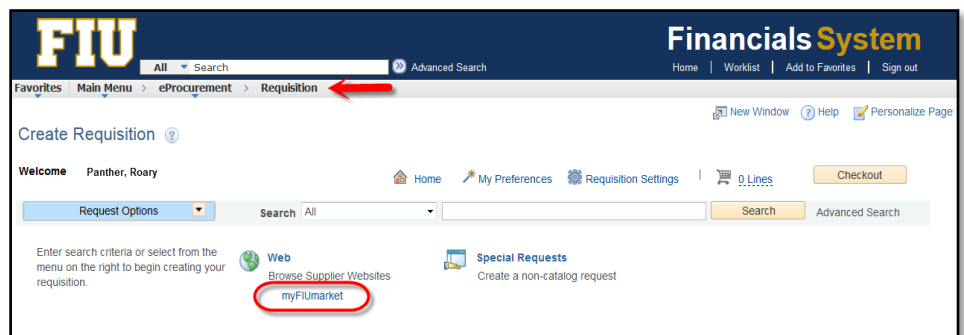
If a department receives **Invoices** from the supplier, they should be forwarded to Accounts Payable in a timely manner so the supplier can be paid.



1—After logging into PantherSoft Financials, navigate to **eProcurement -> Requisition**

2—Click **myFIUmarket**

When creating a requisition ALWAYS search the **myFIUmarket** first.

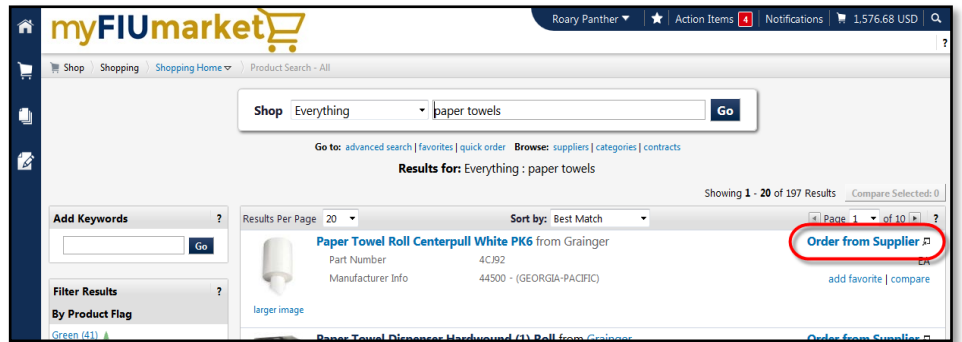


- 1—**Banner** - User Profile, Action Items, Notifications, Shopping Cart, Quick Search Option
- 2—**Navigation Bar** - Hover your mouse over each of the buttons to access a fly-out menu
- 3—**Shop** —Search the market suppliers
- 4—**Message Area**— messages from the Purchasing Department
- 5—**Product Showcase**— quick links for supplier catalogs



Launch directly to the supplier's website by choosing a Supplier's button (#5). Or use the **Shop** field (#3) to search all of the supplier's sites for items. In this example we used the **Shop** field to lookup "paper towels":

Select **Order From Supplier** next to the item you want and you will be re-directed to the supplier's website

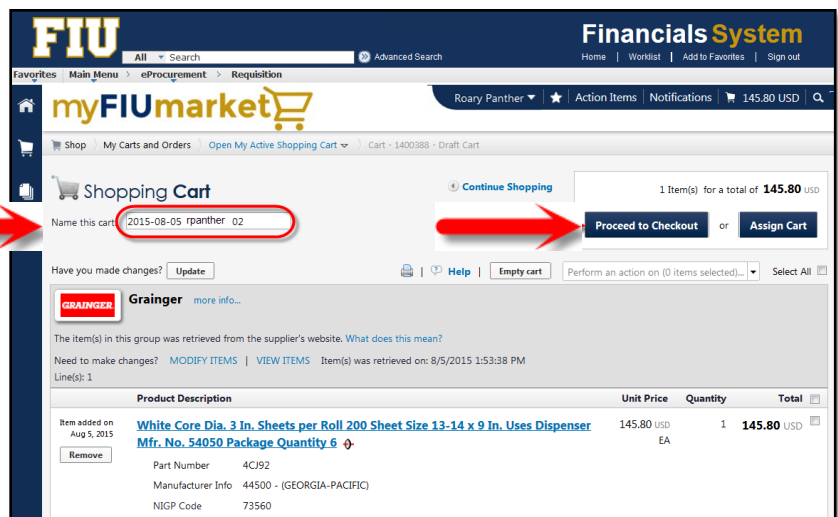


NOTE* The exact steps to creating a shopping cart will vary with each supplier's website. The basic steps are - add items to your shopping cart and then view the cart to checkout or submit. The items you selected will transfer into PantherSoft and myFIUmarket .

You can give the cart a name that is descriptive of what it contains.



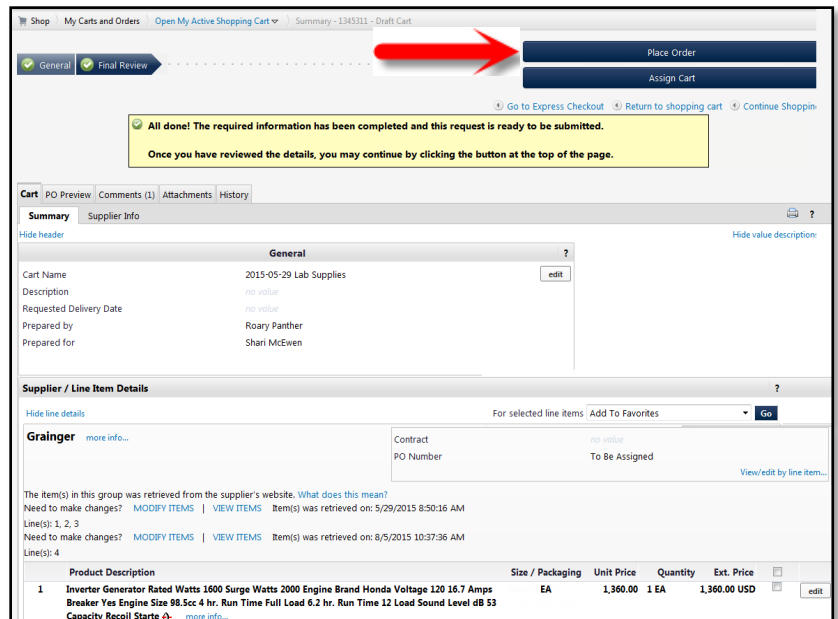
Then click "Proceed To Checkout"



Click "Place Order"



Finish the **Review & Submit** page to complete the order (page 3).



Review & Submit

Checkout - Review and Submit
Review the item information and submit the req for approval.

My Preferences **1** Requisition Settings

Requisition Summary

Business Unit: FIU01 Florida International Univ Requisition Name: []
Requester: 1111111 Panther, Roary Priority: Medium
*Currency: USD

Cart Summary: Total Amount 91.08 USD
Expand lines to review shipping and accounting details **+** Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete	
2 1	White Core Dia. 3 In. Sheets		W W GRAINGER INDUSTRIAL SUPPLY	2.0000	Each	45.5400	91.08	3			
							Total Amount	91.08 USD			

Shipping Summary
 Edit for All Lines

Check Budget

Save & Submit Save for Later Add More Items Preview Approvals

1—**Requisition Settings**—Ship To & Accounting information can be updated for the entire requisition by clicking on Requisition Settings

2—**Note** Ship To & Accounting can be adjusted at the Line-Level by clicking on the gray triangle next to the line selection box

3—**Details**—Allows users to note details like: buyer info, Amount Only, RFQ

Save & Submit the requisition when finished. This triggers approval workflow. Be sure to Check Budget **after** submitting. Budget Checking before submitting the requisition will result in an error.

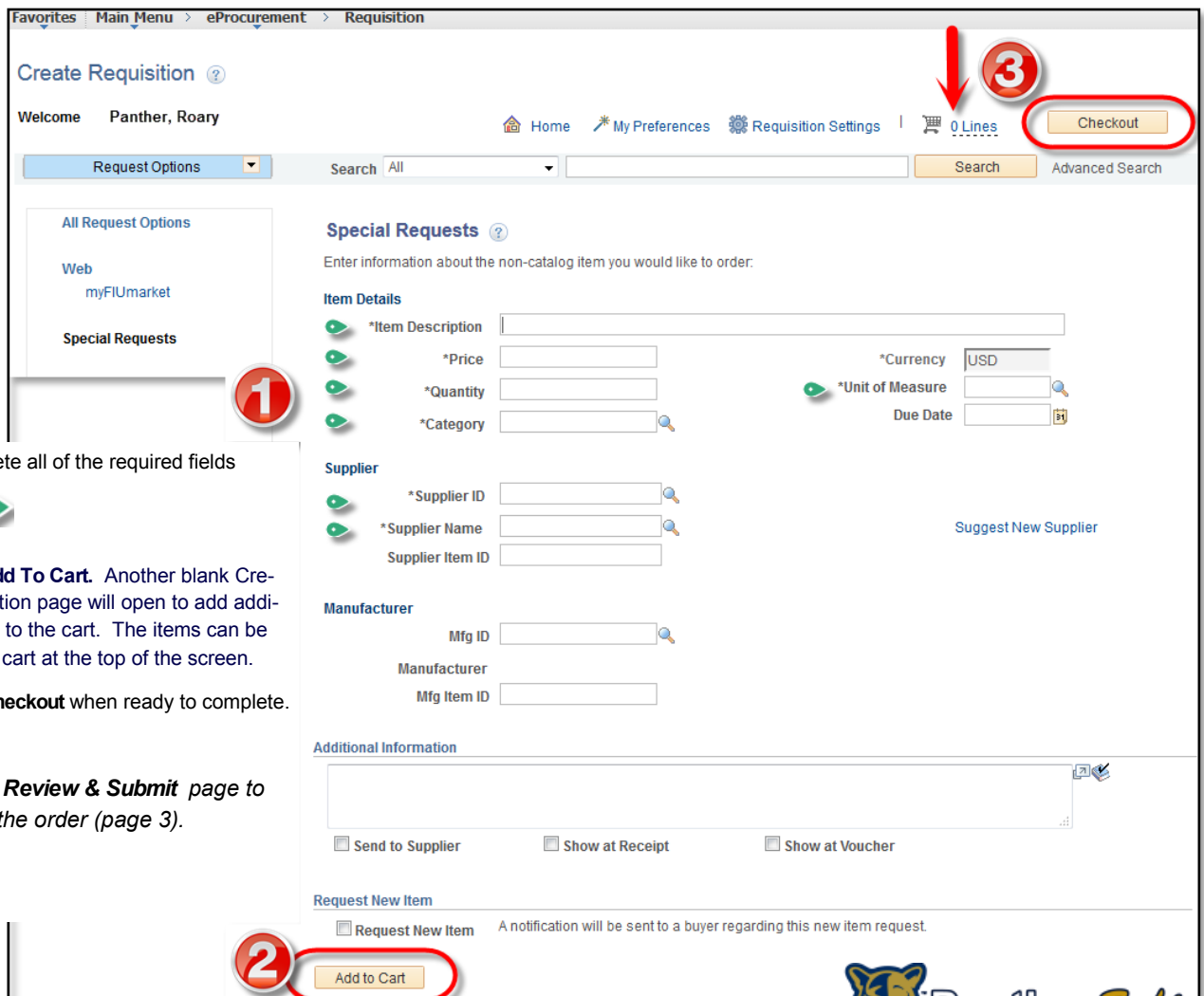
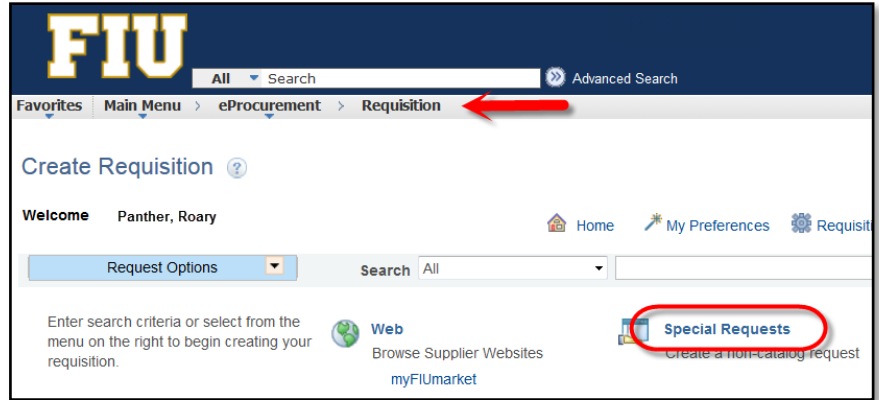
Special Requests - Create a Non-Catalog Request

To request a non-market item, choose "Special Requests – Create a Non-Catalog Request". Enter all the required information into a blank Requisition form – the item, supplier, accounting, etc.. After it's been approved, the requisition automatically routes to a buyer to be sourced to a Purchase Order.

1—After logging into PantherSoft Financials, navigate to **eProcurement -> Requisition**

2—Click **Special Requests**

When creating a requisition ALWAYS search the **myFIUmarket** first.



1— Complete all of the required fields

2—Click **Add To Cart**. Another blank Create Requisition page will open to add additional items to the cart. The items can be seen in the cart at the top of the screen.

3—Click **Checkout** when ready to complete.

Finish the **Review & Submit** page to complete the order (page 3).



Receiving

As soon as the goods/services are received, a **Receipt** should be completed in PantherSoft using the Purchase Order number. The original invoices must be sent to Accounts Payable. Finalizing the **Three Way Matching**—Purchase Order, Receipt and Invoice—is mandatory in order for a supplier to be paid.

- 1—Navigate to **eProcurement** -> **Receive Items**.
- 2—Click **Add New Receipt**.
- 3—Click **Add**.

- 1—Clear all of the search criteria except PO Unit FIU01
- 2—Click **Search** to view a list of open purchase orders
- 3—Select the purchase order to be received
- 4—Click **OK**

Selected Rows	Shipping Related	More Details	Print	Refresh	Close					
Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	FIU01	0000137897	1	1		09/09/2015	2.0000			1250UL TIP BULK 1000/PK

- 1—Enter the amount or quantity received
- 2—Click **Save**

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track
1		Your Order Description	20.0000	EA	10.00000	20.0000	Open	<input type="checkbox"/>		<input type="checkbox"/>	EA	Device Track

This is an outline of the Requisition process. To understand the full process, users should attend Procure to Pay training and refer to the [Procure to Pay Manual](#).

