

Procurement Services will create a COMMENT on the current **Fiscal Year (FY23) Blanket Purchase Order (BPO)**. It will contain information related to the BPO Renewal process, including important dates and will be sent to the associated Shopper and Requester.

- End Users will determine if the FY23 **BPO** should be Renewed for FY24 or Cancelled.

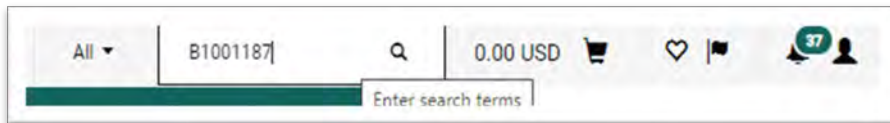
- If the **BPO** is to be Cancelled:

Login to ePro

Reference **BPO** Renewal COMMENT notification to locate **BPO B1001187 for FY2023**

Key that number into the Search field (ex: B1001187)

Enter



Any requisitions, purchase orders, and/or change requests associated will appear

Select the "Purchase Orders" number



From the Purchase Order action menu select "Add Comment"



Select the Procurement Buyer as an Email notification recipient

Enter in the comment field that you intend to cancel the current **BPO**

Select “Add comment” when done

- If the **BPO** is to be Renewed:

Login to ePro

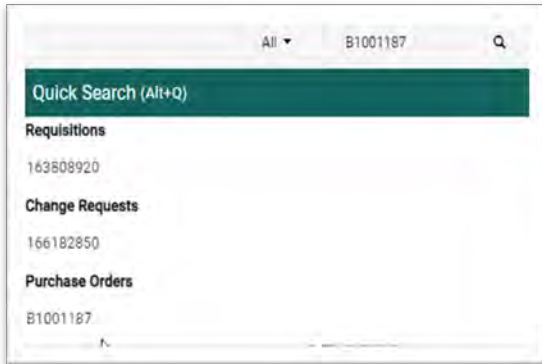
Reference **BPO** Renewal COMMENT notification to locate **BPO B1001187 for FY2023**

Key that number into the Search field (ex: B1001187)

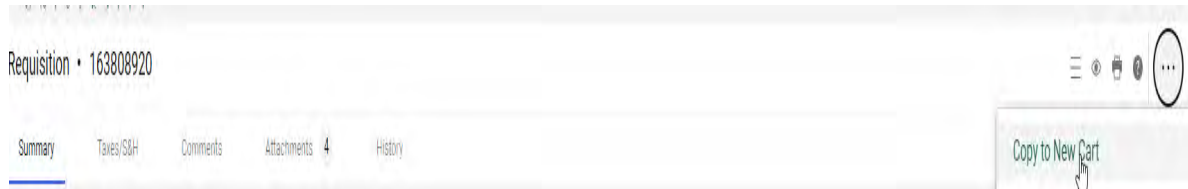
Enter

Any requisitions, purchase orders, and/or change requests associated will appear

Select the requisition number (ex: 163808920)

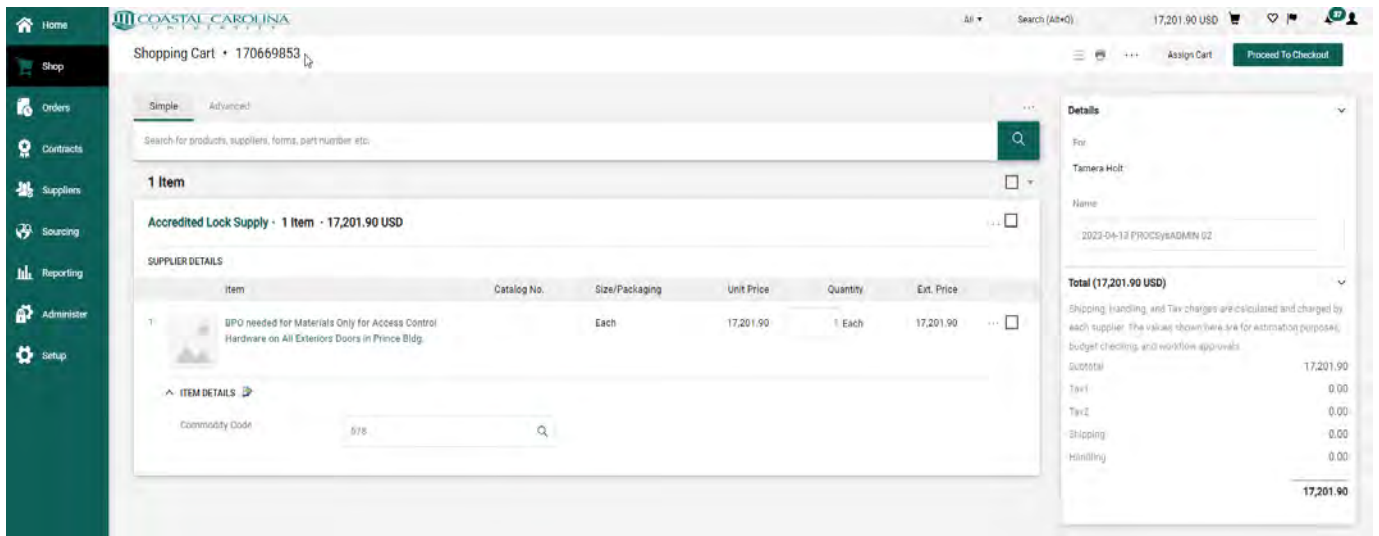


From the Requisition action menu, select "Copy to New Cart"



The basic Cart will be created

Proceed To Checkout



- Update the Cart to reflect changes for FY24

Note: updates generated by a **BPO Change Request** will **NOT** appear on the original requisition and thus will not be reflected on the FY24 **BPO Renewal Copy to new Cart.** Please reference the current FY23 BPO when determining FY24 information.

➤ **General:**

Cart name: FY24 – End User’s name – Supplier name

Description: Blanket Purchase Order Renewal

Accounting Date: leave empty, Proc. Buyer will update later

Requires ITS Approval: check mark yes (if applicable)

Intended Pcard Purchase by Department: for BPO Renewal, select “No”

Is your purchase an allowed Pcard (or travel Card) purchase and do you have sufficient card limits? : select “N/A

Save Changes

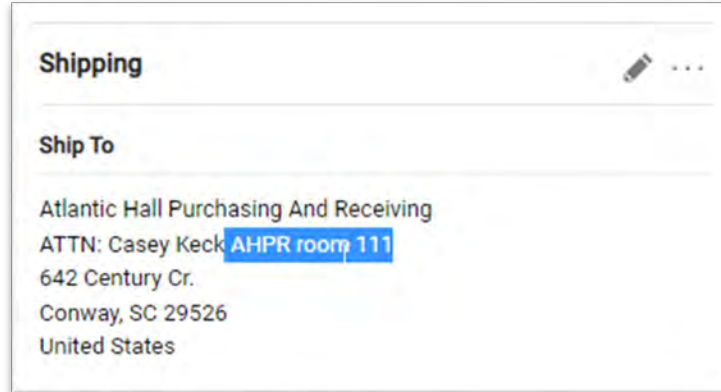
General	
Cart Name	FY24 - ckeck - Accredited Lock Supply
Description	Prince Access Control Hardware
Prepared by	Casey Keck
Prepared for	Tamera Holt
Accounting Date	no value
Requires ITS Approval	<input checked="" type="checkbox"/>
is this a state wide contract?	no value
State Contract Number	no value
Intended Pcard Purchase by Department?	No
Is your purchase an allowed Pcard (or Travel Card) purchase and do you have sufficient card limits?	N/A

➤ **Shipping:**

Verify Shipping address listed

Update if needed

Remember to add the building code and room number



The image shows a screenshot of a shipping form. At the top, the word "Shipping" is displayed in a bold font. Below it, there is a "Ship To" section. The address listed is "Atlantic Hall Purchasing And Receiving", "ATTN: Casey Keck", "AHPR room 111", "642 Century Cr.", "Conway, SC 29526", and "United States". The text "AHPR room 111" is highlighted in blue.

➤ **Account Codes:**

Verify information copied from previous Cart

Edit section (if applicable)

Fund – Activity: a dash is required between the fund and the activity code

Object: search by number for description

Project: **Note: not all GL accounts are associated with a Project ID. This is not a free form field. The information entered in this field must match EXACTLY to what Financial Services created, otherwise an error will occur preventing the cart from becoming a requisition.

➤ **Internal Notes and attachments:**

Internal Note: used only by Procurement Services and Accounts Payable

Internal Attachments:

Copy to New Cart functionality pulls the previous requisition attachments over.
Remove attachments that will not apply to the new request

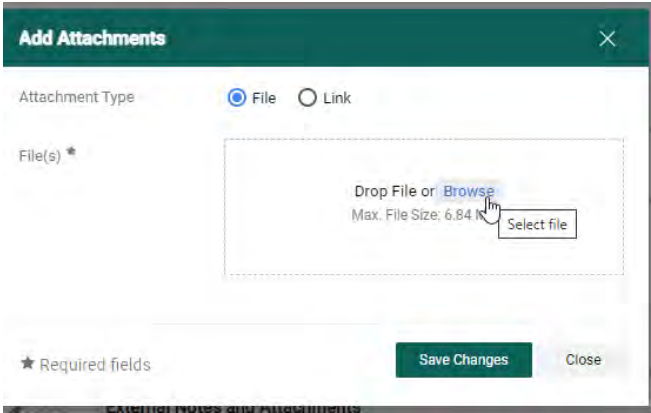
Upload all of the updated supporting documentation (ex: BPO Renewal COMMENT notification, quote, COI, contract for Legal review, sole source documentation, etc...)



Click on "Add"

Attachments can be files or links

Select "Save Changes"

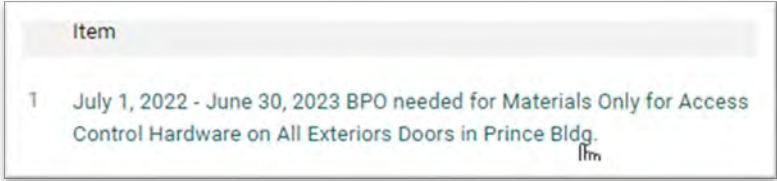


➤ **Supplier and Item Description:**

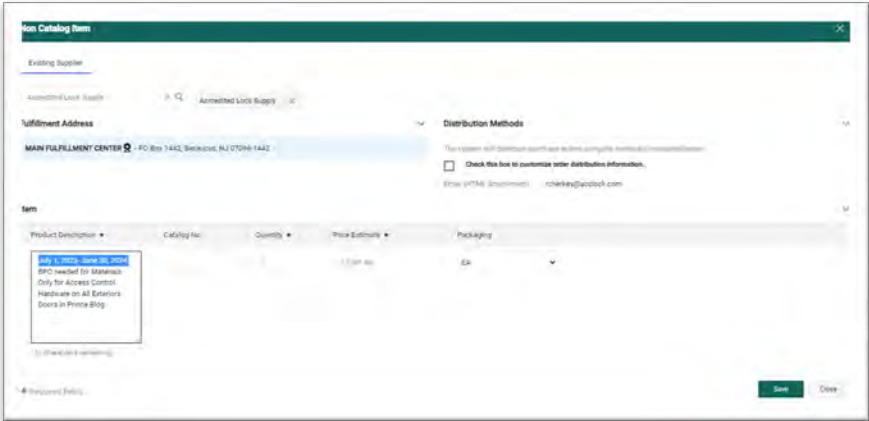
Review and verify

Update for new **Fiscal Year (FY24)** (if applicable)

To update a line item, click on the description



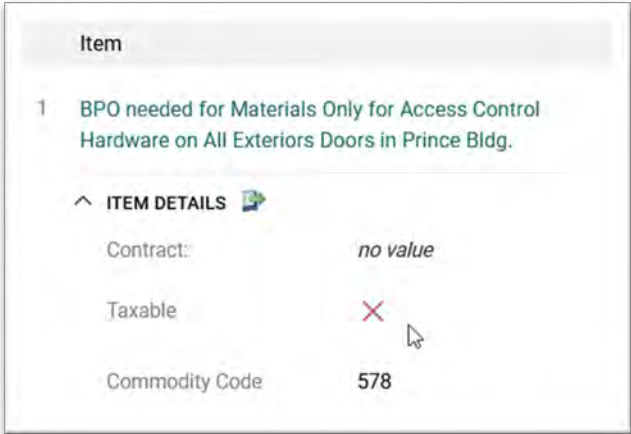
Update field(s) on the pop-out window



Save

Verify tax application

Copy to New Cart will mirror the Tax field on the previous requisition



To Edit (if applicable) - click on the particular "Edit Line_: Item Details" pencil to access



➤ **External Notes and Attachments:**



Edit Section

Note to all Supplier:

This area allows entry of 1000 characters

Expand field to view entire box

Click and Drag corner to expand or select the “expand” option

Update to reflect FY24 information

Including the following:

Update FY24 Blanket Purchase Order date range

Copy the Item Description line and paste here

Include the ePro BPO Number FY23: B1001187

Add FY23 Agreement Number (if applicable)

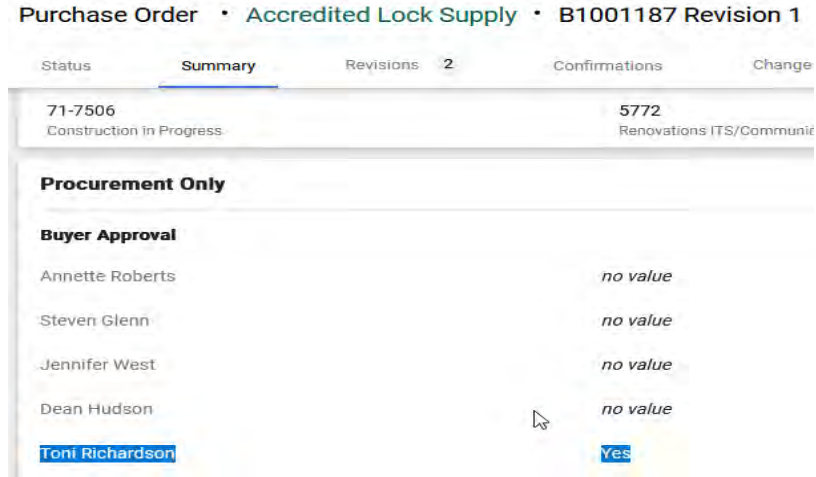
A screenshot of a web form titled "Edit External Notes And Attachments". The form has a dark green header with a close button (X). Below the header is a section titled "External Info". There is a label "Note to all Suppliers" next to a large text area. The text area contains the following text: "Blanket Purchase Order for period 7/01/2023 - 6/30/2024.", "BPO needed for Materials Only for Access Control Hardware on All Exteriors Doors in Prince Bldg.", "For supplies as needed throughout the year.", "FY23 B1001187", "71-7506-5772", "Project 71-7693", "Contact Del Altman 843-421-3439", "Completion Date 6/30/24", "AP Type 09". Below the text area, it says "686 characters remaining" and "expand | clear". There are two input fields: "Agreement Number" with the value "No Value" and "PO Clauses" with the value "1". At the bottom right, there are "Save" and "Close" buttons.

Save Changes

➤ **Comments:**

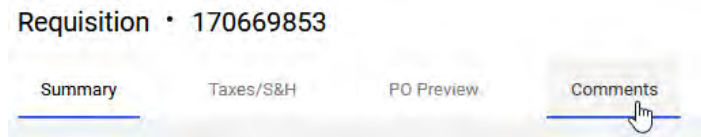
Create a Comment indicating the Procurement Buyer listed on the FY23 BPO.

Example: from Purchase Order B1001187 – Toni Richardson is the Procurement Buyer

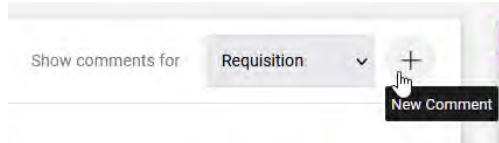


So on FY24 Cart (170669853)

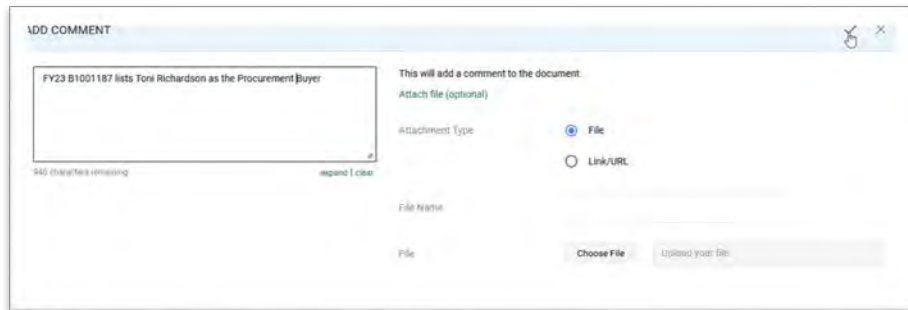
Open COMMENTS tab



Add a COMMENT



Key in the previous year's Procurement Buyer's name & Blanket Purchase Order



Click the checkmark to save the comment

Depending on what role assigned to you in ePro, what role you will fulfill in the BPO Renewal process, and what additional Departmental / Area processes are required in addition to the general university workflow established, will determine what your next step will be.

“Assign Cart” to a Requester?

“Assign Cart” to another End User with the Shopper / Requester role for their approval via comment?

“Place Order” so that the Cart enters the workflow process of becoming a Requisition, obtaining approvals (example: from Budget Officers, ITS, Marketing and Communication, Grants, VP Level and Procurement Services).

Should you have questions, concerns or issues related to ePro, please contact Casey Keck ckeck@coastal.edu / 843-349-2061 for assistance.

Checklist

- Fiscal Year 2023 **B**lanket **P**urchase **O**rder number _____
- Determine if a **Fiscal Year 2024** will need to be created (yes/no) _____
- FY23 Procurement Buyer name _____
- Compile updates made since FY23 BPO created that need to reflect on FY24 request _____
- Obtain updated quote
- Update sections:
 - General (page 4)
 - Shipping (page 4-5)
 - Account Codes (page 5)
 - Internal Notes and attachments (page 5-6)
 - Supplier and Item Description (page 6-7)
 - External Notes and Attachments (page 8)
 - Comment (page 9)
- How to proceed request forward