

Procurement Services will create a COMMENT on the current **Fiscal Year (FY24) 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 FY24 **BPO** should be Renewed for FY25 or Cancelled.
- If the **BPO** is to be Cancelled:

Login to ePro

Reference **BPO** Renewal COMMENT notification to locate EXAMPLE: **BPO B1001230 for FY2024**

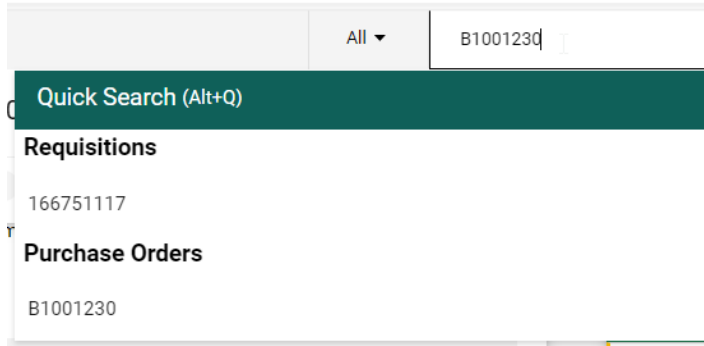
Key that number into the Search field (ex: B1001230)

Enter

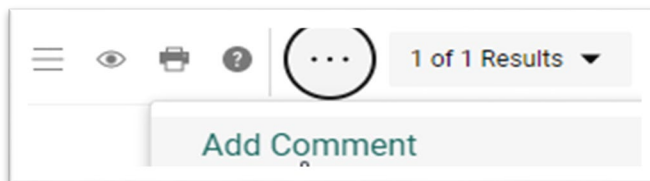


Any requisitions, purchase orders, and/or change requests associated will appear

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

**Add Comment** ✕

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s) | [Add recipient](#)

Jessica Youngblood (Prepared by, Prepared for) <jlutz@coastal.edu>

Steven Glenn (Approved) <sglenn@coastal.edu>

Toni Richardson <trichards@coastal.edu> (Inactive)

cancel

994 characters remaining expand | clear

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Add Comment
Close

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

Login to ePro

Reference **BPO** Renewal COMMENT notification to locate EXAMPLE: **BPO B1000986 for FY2024**

Key that number into the Search field (ex: B1000986)

Enter

All ▾

B1000986

0.00 USD

🛒

♥

1

🔔

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

All ▾

B1000986

**Quick Search (Alt+Q)**

**Requisitions**

157197655

**Change Requests**

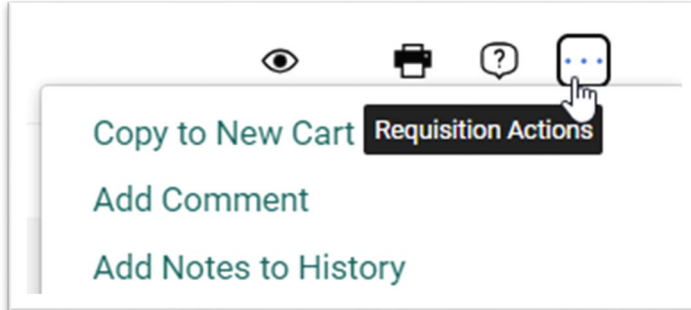
161081413

**Purchase Orders**

B1000986

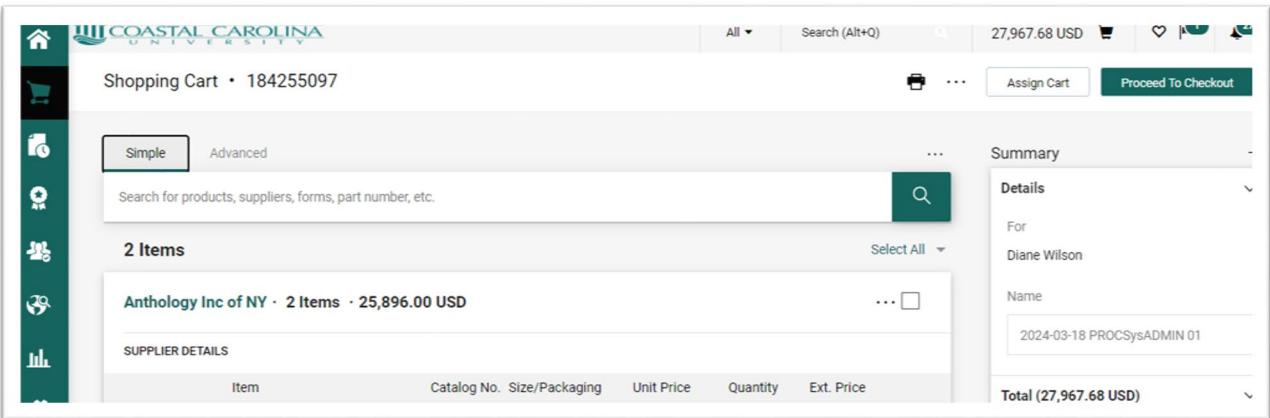
Select the requisition number (ex: 157197655)

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 FY25

**Note:** updates generated by a BPO Change Request will **NOT** appear on the original requisition and thus will not be reflected on the FY25 BPO Renewal Copy to new Cart. **Please reference the current FY24 BPO when determining FY25 information.**

➤ **General:**

**Cart name:** FY25 – End User’s name – Supplier name

**Description:** Blanket Purchase Order Renewal

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

**Does this involve the purchase of IT hardware or software?:**

check mark yes (if applicable)

**If this is a software purchase, will it be used to receive credit card payments from third parties?:** update as 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

Requisition • 184255097

Summary Taxes/SSH PO Preview Comments Att

**General**

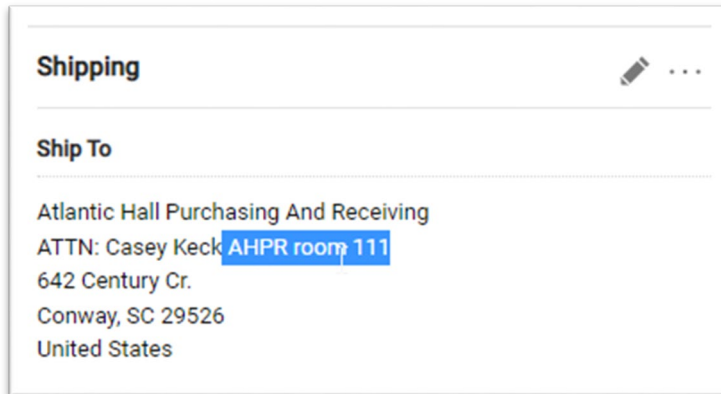
Cart Name	FY25 - Ckeck - Anthology Inc of NY
Description	Blanket Purchase Order Renewal
Prepared by	Casey Keck
Prepared for	Diane Wilson
Accounting Date	no value
Does this involve the purchase of IT hardware or software?	✓
If this is a software purchase, will it be used to receive credit card payments from third parties?	No
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
Is this a Sole Source?	no value



➤ **Shipping:**

Verify Shipping address - reference page 5 of the Shopper and Requester handout

Update if needed

Remember to add the building code and room number



**Shipping**  

---

**Ship To**

---

Atlantic Hall Purchasing And Receiving  
ATTN: Casey Keck **AHPR room 111**  
642 Century Cr.  
Conway, SC 29526  
United States

➤ **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.

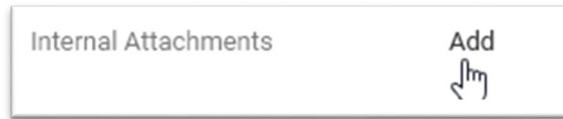
➤ **Internal Notes and attachments:**

**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

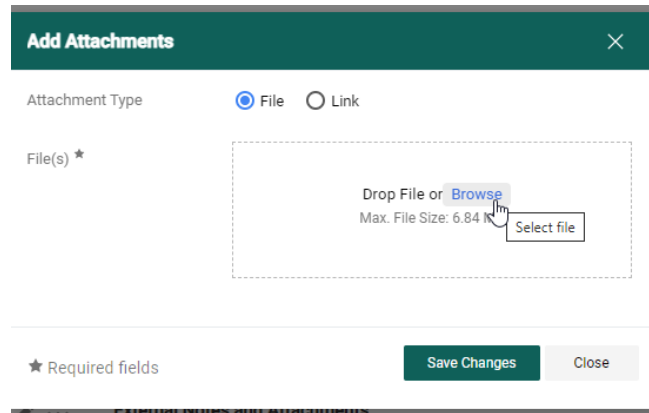
Upload all of the updated supporting documentation (ex: BPO Renewal COMMENT notification, quote, COI, contract for Legal review, sole source documentation, etc...)



Click on "Add"

Attachments can be files or links

Select "Save Changes"

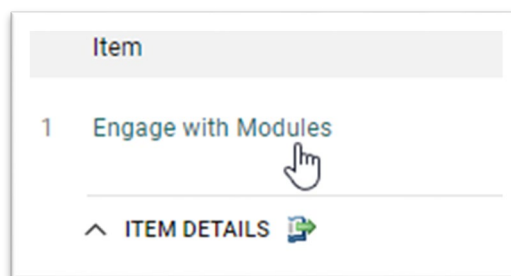


➤ **Supplier and Item Description:**

Review and verify

Update for new Fiscal Year (FY25) (if applicable)

To update a line item, click on the description



Update field(s) on the pop-out window

**Non Catalog Item**

Existing Supplier

Anthology Inc of NY × Q Anthology Inc of NY ×

**Fulfillment Address** ∨ **Distribution Methods**

**MAIN FULFILLMENT CENTER** 📍 - 298 Main Street, Suite 600, Buffalo, NY 14202

The system will distribute purchase orders using the method

Check this box to customize order distribution information

Email (HTML Attachment) ar@campuslabs.com

**Item**

Product Description *	Catalog No.	Quantity *	Price Estimate *	Packaging
FY25 - Engage with Modules		1	20,200.00	EA <span>∨</span>

Save

**Verify tax application**

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

**Item**

1 BPO needed for Materials Only for Access Control Hardware on All Exteriors Doors in Prince Bldg.

**ITEM DETAILS** 📄

Contract: no value

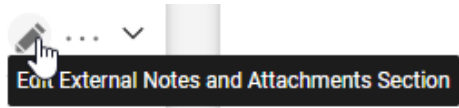
Taxable ×

Commodity Code 578

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

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 BPO needed for Materials Only for Access Control Hardware on All Exteriors Doors in Prince Bldg.		Each	18,733.40	1 Each	18,733.40
<b>ITEM DETAILS</b> Contract: <i>no value</i> Internal Note: <i>no value</i> Internal Attachments: <a href="#">Add</a>					

➤ **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 FY25 information

Including the following:

Update FY25 Blanket Purchase Order date range (07/01/24 - 6/30/25)

**Copy the Item Description line and paste here**

Include the ePro BPO Number FY24: B1000986

Add FY24 Agreement Number (if applicable)



**External Notes and Attachments** ✎ ... ▾

---

Note to all Suppliers    BPO effective 7/1/24, through 6/30/25 / AP type - 01

Cancels/supersedes: B1000986

Engage with Modules - \$20200 (annual), Engage: Event Check-in App - \$6,723(annual)

Per the specifications, and requirements of Request For Quote # CCU-9300404.

Contract term: 7/1/21, through 6/30/24 \*\*\*please note if overall contract is ending \*\*

CCU agreement #, 2021-OSL15207

Contact: Diane Wilson / Fiscal Technician, Student Engagement / Lib. Jackson Student Center B-213 / 843-349-2310

Save Changes

➤ **Comments:**

Create a Comment indicating the Procurement Buyer listed on the FY24 **BPO**.

Example: from Purchase Order B1000986 – Steven Glenn is the Procurement Buyer

Purchase Order • Anthology Inc of NY • B1000986 Revision 1

Status    Summary    Revisions 2    Confirmations

---

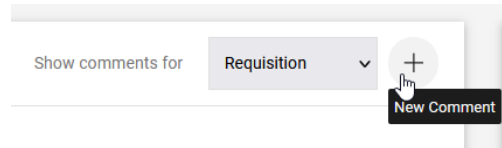
**Buyer Approval**

Annette Roberts	no value
<b>Steven Glenn</b>	<b>Yes</b>
Jennifer West	no value
Dean Hudson	no value
Toni Richardson	no value

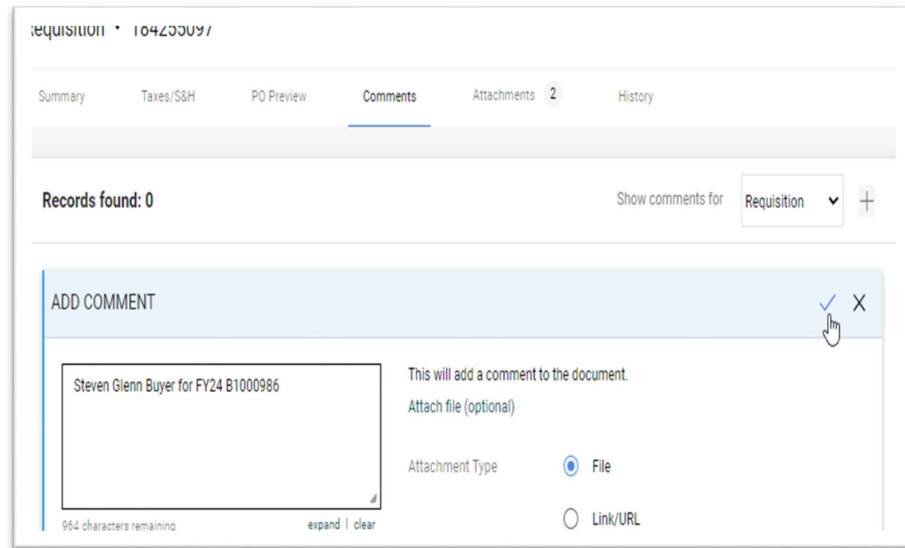
So on FY25 Cart (184255097)

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](mailto:ckeck@coastal.edu) / 843-349-2061 for assistance.

## Checklist

- Fiscal Year 2024 **B**lanket **P**urchase **O**der number \_\_\_\_\_
- Determine if a **Fiscal Year 2025** will need to be created (yes/no) \_\_\_\_\_
- FY24 Procurement Buyer name \_\_\_\_\_
- Compile updates made since FY24 BPO created that need to reflect on FY25 request \_\_\_\_\_
- Obtain updated quote
- Update sections:
  - General (page 3- 4)
  - Shipping (page 5)
  - Account Codes (page 5)
  - Internal Notes and attachments (page 5-6)
  - Supplier and Item Description (page 6-8)
  - External Notes and Attachments (page 8-9)
  - Comment (page 9-10)
- How to proceed request forward