Falcon’s Purch Guide
REQUESTORS AND SHOPPERS
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General Shopping & Requisitions

Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.

Punchout, Hosted Catalogs and Non-catalog Items

- **Punchout Suppliers**: After clicking on the supplier, you will be directed to the supplier’s site to shop. Locate the items you need and add them to your cart. When done, you will check out and be taken back to Falcon’s Purch.
- **Hosted Catalog Suppliers**: After clicking on the supplier, you are prompted to type a product you are shopping for in a search bar.
- **Non-catalog item**: This option is used when the supplier isn’t listed on the homepage. You’ll need to obtain a quote that you will attach to the order.

When you are done shopping, click on the shopping cart icon. You have the option to View My Cart or Checkout.
View My Cart. From here you can Empty Cart or select a specific line to take action on by checking the box for the line you want to select. Click on Perform an action on (# items selected), select the action you want to take. You can now either Proceed to Checkout or Assign Cart to a requestor.

Proceed to Checkout: Review the requisition before submitting. If you see a red triangle, then you need to enter required information. Clicking the Red Triangle will take you to the place on the requisition that needs modified. Below you will see that I need to enter a room for the Ship To address. If this is a blank order (your unit of measure is USD) be sure to mark the box under the General tab as a Blanket PO (used when processing multiple invoices/orders on one purchase order). To change or split the accounting codes (see below) go to Requisition > Accounting Codes tab. When complete Submit Requisition or Assign Cart.

Splitting Between Multiple Budgets

Click on the Accounting Codes tab.
Scroll down to Product Description, click on edit under the dollar amount for the line you want to split with another budget.

Scroll all the way to the right and click on “add split.” Click on the drop down to split by either quantity (enter number of items) or amount (enter a dollar amount).

Scroll to the left to select the Speedcharts for each line. If the speedchart is not in your profile values, click on Select from all values... Be sure scroll to the right to add the account and program code (if applicable).

Click Save to save the changes or Cancel to clear them.

If the amount is greater than $999, you will need to enter a receipt after the purchase order has been created.
Foundation Budgets

*Please know that the Amazon punchout in Falcon’s Purch currently can’t be used for Foundation purchases. To purchase from Amazon you will have to charge the expense to your department budget and then submit a Foundation Disbursement Request Form to allocate to the Foundation budget.

Set up your Foundation Accounts in your profile by click on your name in the upper right corner of Falcon’s Purch, selecting View My Profile.

From the left navigation, select Custom Field and Accounting Code Defaults. Click on the Codes header. Click on Edit for the Business Unit GL and then Edit.
Click on Create New Value. Checkmark BGFDN and Add Values.

To setup your Foundation speedcharts, go back to the Codes tab and click Edit for the Speedchart.
Select BGFDN as the Business Unit GL. Click on Create New Value and enter the speedchart in the Value field click Search.

Selecting the Foundation Business Unit and your Speedcharts

From the Requisition > Summary tab, click Edit and select BGFDN to use a Foundation account.

Scroll down to the Accounting Codes and click on Edit.

Now that you have your default values set, you can create your requisition or payment request as you normally would.

If you have BGFDN in your profile, choose Select from profile values... Otherwise, Select from all values...Save.

* If your speedchart is not available, contact Purchasing.
Select the Business Unit GL (BGFDN) and your Speedchart. The rest of the accounting string for the speedchart will auto populate.

Scroll all the way to the right to enter an Account and Program Code (program code is optional). Save.
Non-Catalog Item

Select non-catalog item from the home page.

Next fill in the necessary information – skip the product size section. If you don’t have a Catalog No. enter N/A or 0. You can create this as a regular requisition using EA as the UOM or a blanket order using USD. If you have multiple lines to enter click on Save and Add Another. After you have entered your lines, click on Save and Close.

Then go to the upper right hand corner and click on your shopping cart and Checkout. Make sure you attach the quote to the requisition.
Creating Blanket POs

A Blanket Purchase Order (PO) is used when the order will be received in several shipments, will be paid from several invoices, and is ordered from a non-catalog supplier. You will estimate the amount you will need. If you underestimate, an increase can be put in place. If you overestimate, the funds will be released back to your budget once the PO is closed.

From the Home/Shop screen click on non-catalog item.

![Non-catalog item selection](image1)

Fill in the product description, enter 0 or NA for catalog no., use quantity of 1, fill in the price for the PO, always select USD for the unit of measure and enter a commodity code. Click Save and Close.

![Product details](image2)

Click on your cart in the upper right hand corner of the screen. Click Checkout.

![Cart checkout](image3)
Click the Summary tab and then Edit in the General area. Check mark the Blanket PO box.

If you see a red triangle, click on the tab and enter the required information.

If you need to change the budget codes, click on the Accounting Codes tab and then Edit.

Click Submit Requisition or Assign Cart to a specific requestor. The requisition will then go to the proper approvers and the PO will be created once all approvals have been completed.
Receipts – Quantity or Cost

Receipts are required for all purchase orders (PO) that are greater than $999. You should not enter a receipt until after the goods/services have been received. You will receive a weekly notification to enter a receipt, please disregard the notice until all goods/services have been received. Multiple receipts can be entered. For example, if you receive part of the order, you can receive for those items.

Creating a Quantity Receipt – used when the Unit of Measure is not USD.

Locate the PO. Go to Available Actions and select Create Quantity Receipt from the dropdown menu then hit Go.

Scroll down to the Receipt Lines. If you are only receiving against one PO line, you must first delete the lines you WILL NOT be receiving against. To delete a line click on Remove Line.
Enter the amount of items you have received for each line. Click on Save Update and then click Complete.

Creating a Cost Receipt – is used when the UOM is USD.

Locate the PO. Go to Available Actions and select Create Cost Receipt from the dropdown menu then click Go.

Scroll down to Receipt Lines. Enter the dollar amount of the items that have been received. Click on Save Updates and then Complete.
Payment Request Form

When paying a vendor for services/goods that have already been provided, you will need to submit the electronic payment request in Falcon’s Purch.

From the home page, scroll down to the bottom of the page and click on Payment Request.

Below is the first section of the form. Please note that the Supplier Inv # field can contain only numbers, letters, forward slash (/) and hyphen (-). If you don’t have an invoice number, you can enter the date services were provided in this field. If you don’t have an invoice date, enter the date of service/event.

Form Instructions

By clicking on the ? in upper right hand corners you will see directions for each section.

University departments should utilize this form to pay vendors to expedite the creation of a requisition and purchase order. You must have the invoice or receipt to use this form. If your reimbursement falls under the Single Pay guidelines, see information located in the upper right corner.

Supplier Inv # (only 1 invoice per request)

Invoice Date

*If your invoice does not have an invoice number, use the date of service/event for the invoice number.
Click on Supplier Search to locate the vendor that needs to be paid. **Be sure to select the same address that is shown on the suppliers invoice.**

**Regular Pay Vendor - Only To Be Used For Vendors In Our Vendor Database**

Enter Supplier  

or  

Supplier Search

*To select a specific remit to address, click on Supplier Search.

**Single Pay Vendor**

If the request is for a single payment to reimburse a student or to give a prize or award to a non-employee and the amount is under $300, the payment should be processed through Chrome River. Please contact Accounts Payable at 2-2311 if you have not yet utilized Chrome River for single payments. If you are paying an individual for services, regardless of the amount, you must go through the Independent Contractor process. The paper Single Payment Request should only be used for payments being directed to a balance sheet or revenue account.

https://www.bgsu.edu/purchasing/vendor-data-forms.html


Enter the amount to be paid and the quantity.

**Invoice Amount**

**Invoice Information**

Price  

UOM  

Quantity

Select the Type of Payment and enter a Handling Code for the check distribution. If there are no specific instructions for Handling Code, select RE Regular Payments.
Enter the Business Purpose for the payment, this includes who, what, why, where and when. Attach supporting documentation, and select a commodity code.

After you have filled out the form, scroll to the top of the page to Add and go to Cart. Proceed to checkout or assign cart.

If you need to change the budget the payment is being directed to, click on Accounting Codes and then Edit.

If you need to split the payment between multiple budgets, scroll down to the Product Description and click on edit.
Scroll all the way to the right and select Add Split.

Select the speedchart for each line. Selecting from profile values will provide only the speedcharts you have added to your profile. To select from all University budgets, select from all values.

Make sure your account and if applicable program code are correct for each line. You can split by amount or quantity (amount is most commonly used). You can also click on add split again if you need additional lines.

Scroll back up to the top of the page and either Submit Requisition or Assign Cart to a requestor. After the requisition has been approved, it will turn into a purchase order, but it will NOT be sent to the vendor.
Search and Export

Hover over the Documents icon and click on Search Documents. Select the documents you would like to search for.

Select your criteria and then click on Search. The example below will locate all open POs that were prepared by Kim Griner.

Receipt Status
- No Receipts
- Fully Received
- Partially Received
- Over Received

Invoice Status
- No Invoices
- Fully Invoiced
- Partially Invoiced
- Over Invoiced

Matching Status
- Partially Matched
- Fully Matched
- No Matches

AP Status
- Open
- Soft Closed
- Closed
If you would like a spreadsheet of the search results, click on Export Search.

Enter a File name and select the Request Export Template. Click Submit.

Click on the Download Exports tab to refresh the page. Click on the File Name when the Export Status is Completed.

Click Go to Page: Download Export Files.
Click OK to open the zip folder.

Click on the first Excel workbook.
## Support

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