Shopper/Requestor

Creating a Catalog Requisition
1. Catalogs are contracts where special pricing has been negotiated either by the College or the Tennessee Board of Regents.

2. There are 2 types of catalogs:
   A. Hosted: the items and pricing in the catalog are stored within PelliBiz.
   B. Punch-out: the vendor has provided a link to a version of their website that reflects the contract pricing, much like Stapleslink.com
3. Click on the Staples sticker to open the Punch-out Catalog.
4. Use Categories on the left or enter the item number in the Search Bar at the top to navigate the site.
5. If you buy certain items on a regular basis, they can be added to a list by opening the Your Shopping Lists drop down menu and selecting Create New List.
6. Create a name for the list and add a description.
7. Type the item number(s) in the space provided, click the Add to List Button and click the Save List button
8. To search for items using the Categories, hold the cursor over the appropriate category.
9. Click on the subcategory to view specific items.
10. Select an item, change the quantity if necessary and click the add to cart button.
11. An Item Added to Cart Box will appear each time you add an item. It isn’t necessary to Close the box because it will disappear.
12. After all the items have been selected, Click the Checkout button.
13. Confirm the items and quantities in your cart.
14. Scroll to the bottom of the page and click submit. This will pull the cart into PelliBiz.
15. Once the cart is in PelliBiz:
   A. Shoppers: Click the Assign Cart button and send it to the appropriate person. This is the Shopper’s last step.
   B. Requestors: Click the Proceed to Checkout button.
16. To complete the Shipping Address, click the edit button.
17. Enter Shipping/Receiving in the space provided.
18. Click Save.
19. Click on the Accounting Codes Tab:
   A. Shoppers cannot enter Accounting Codes; therefore, they must click the Assign Cart Button to send it to their Requestor. This is their last step.
   B. Requestors will click the edit button to open the Accounting Codes box.
20. After accessing the Accounting Codes box, click on Select from profile values to open the drop down menu of Index codes to select the correct code. Notice the Fund, Organization and Program automatically populate.
21. Click on the Select from all values to select the correct Account number.
22. To search for an account code, use the Value field if searching by a number (ex. 74505) or the Description field if searching by a word or phrase (ex. Office Supplies). Partial numbers or descriptions may be used.

23. Click Search.
24. Click Select for the correct code.
25. After completing the Accounting Codes, Click Save.
26. Once all of the boxes in the Tool Bar have green checkmarks, click the Submit Requisition button.
27. The Submission Confirmation page will appear with important information including: the Requisition Number, Quick View for a printable view of the order and the Approvals Tab.
28. Click the Approvals Tab.
29. This shows the process of approvals the requisition must follow before it will be completed as a Purchase Order.

30. Click on the view approvers button to view the approvers in each queue. Their contact information is provided if you have any question.