



Business Plus Upgrade What's New in 22.4

End User Training




AGENDA - “What’s New”

- Log In Screen
- New Dashboard & Navigation
 - Schools/Department Tab (Workflow Approvals Box)
- Purchase Requisition
 - (Stock Layout, Attachment, Approval)
 - Sample Req (Grid Mode Setting/Editing)
- Budget Transfer
 - Sample Transfer
- GL 5000 Budget to Actual
 - Sample Report
- Goods Receipt
 - Sample Receipt
- PO 3001 PO Status Inquiry Report
- PunchOut Video (Demo)
- Questions?





Log In Screen

Welcome to
 **BusinessPlus**

Username

Password

[Forgot your Password?](#)

Log in

 **PowerSchool**

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**You can only sign into one device at a time there is no concurrent login. i.e. PC or Laptop
You can use any browser to log in to B+ 22.4.**





Dashboard & Navigation

After you login this is the **new home screen** you will see. You will need to select the **Schools/Departments Tab** to proceed.



Schools/Departments Tab

BusinessPlus ST LOUIS PS TEST

Menu

Schools/Departments

School Discretionary's Personal Dashboard General Ledger **Schools/Departments**

Purchase Requisitions, Ord...

- POUPPR Purchase Requests
- POUPRC Receiving Information
- POUPPP PunchOut Web Shopping

Contracts

- CMUPCM Contract Management
- CMUPTK Contract Tracking

Workflow Approvals

Go to Workflow Tasklist

No tasks

Refreshed at Thursday, March 16, 2023 8:18:17 In Office

Budget Transfers

- GLBUBAUB Create/Update BU Set

Reports

- PO3001: Purchase Order Status Inquiry
- GL5000_SLPS: General Budget to Actual ...



All of your activities in B+ will be conducted using the Schools/Departments Tab. Any tasks needing approval will appear in the “Workflow Approvals**” section for you to select and approve.**



Stock Layout Set Up – PR

The screenshot displays a software interface for setting up a Purchase Request (PR). On the left is a sidebar menu with options like 'Records', 'Reselect', 'Field Help', 'About', 'Threaded Notes', 'Screen Links', 'Attachments', 'Pending Tasks', 'Reload Record', 'Revert Changes', 'Save Changes', 'Export to Excel', 'Tools', and 'Layout Management'. The 'Layout Management' menu is expanded, showing 'Start Designer', 'Undo Layout', 'Remove Default Layout', and 'Manage Layouts', with 'Manage Layouts' circled in red. The main form contains fields for 'PR Number*', 'PO Number', 'Status*' (set to 'PR'), 'Security Code' (9780), 'Requested By' (Jason Davis), 'Date Requested' (05/25/2023), 'PO Total' (0.00), 'PR Total' (0.00), 'Vendor ID', 'Vendor Name', and 'Ship To ID' (9780). Below the main form is a 'Manage Layouts' dialog box. The dialog has a title bar with 'Manage Layouts' circled in red. It contains a 'Layout:' dropdown menu with 'School Sample' selected, a 'Name:' field with a dropdown menu showing 'Stock', 'Group Layouts', and 'School Sample', and a 'Default Layout:' checkbox which is checked. At the bottom of the dialog are buttons for 'Close', 'Save' (circled in red), 'Delete', 'Load', and 'New'. A speaker icon is visible in the bottom right corner of the dialog area.

Each user will have to manually set the “School Sample” layout upon entering a Purchase Req. This option is only available under the “Purchase Request” section on the Schools/Dept Tab. This function will set up the default Purchase Requisition entry screen.



Attachment – Purchase Req

The screenshot shows a software interface for managing Purchase Requests. On the left is a 'Menu' with various options. The main area displays a form for a Purchase Request with fields for PR Number, PO Number, Status, Requested By, Date Requested, Vendor ID, Vendor Name, Ship To ID, and FISCAL CONT OFFICER. The 'Attachments' section at the bottom has a dropdown menu set to 'Purchase Doc...' and a button labeled 'Add New Attachment'. A red circle highlights the 'Attachments' menu item, and another red circle highlights the 'Add New Attachment' button.

Menu

- Search
- Records
- Reselect
- Field Help
- About
- Threaded Notes
- Screen Links
- Attachments**
- Pending Tasks
- Reload Record
- Revert Changes
- Save Changes
- Export to Excel
- Tools
- Layout Management

Add

PR Number* PO Number Status* PR Security Code 9780

Requested By Jason Davis Date Requested 05/25/2023 PO Total 0.00

PR Total 0.00

Vendor ID Vendor Name

Ship To ID 9780 FISCAL CONT OFFICER

Attachments

Purchase Doc... Add New Attachment

Search (ex: pdf)

PR Number* PO Number Status* PR Security Code 9780

Requested By Jason Davis Date Requested 05/25/2023 PO Total 0.00

PR Total 0.00

Vendor ID Vendor Name

Ship To ID 9780 FISCAL CONT OFFICER

You will add an attachment (i.e. quote) to a Purchase Req in a manner similar to attaching a document to an email.



Pending Tasks – Approval

Menu ×

Search

Records

Reselect

Field Help

About

Threaded Notes

Screen Links

Attachments

Pending Tasks

Reload Record

Revert Changes

Save Changes

Export to Excel

Tools

Layout Management

PR Number* PO Number Status* PR Security Code 9780

Requested By Jason Davis Date Requested 05/25/2023 PO Total 0.00

PR Total 0.00

Vendor ID Vendor Name

Ship To ID 9780 FISCAL CONT OFFICER

Approvals

Purchase Doc...

✓ Accepted
ATHOMAS1
Group:
On: 05/05/22 07:35:54

✗ Not Accepted
JGRIFFIN9343
Group: L1500 Carnahan HS
On: 05/05/22 11:13:36

Approvals

Purchase Doc...

✓ Accepted
Jason Davis
Group:
On: 05/11/23 12:07:49

✓ Accepted
Jason Davis
Group: L4000 Adams ES
On: 05/11/23 14:17:14
Note: Test

✓ Accepted
ATAYLOR
Group: Finance Analyst 1
On: 05/12/23 10:08:08

✓ Accepted
MPADEN
Group: WF Fiscal
On: 05/12/23 10:20:22

✓ Accepted
DJOHNSON1
Group: WF Purchasing Buyer2
On: 05/15/23 07:46:34
Note: missing a quote

✓ Approve





✗ Reject

👉 Hold

↩ Forward



Pending Tasks – Approval

- a) To approve the requisition, click the  icon, the requisition will then route to the next line of approval.
- b) To decline the requisition, click the  icon, and the requisition will be rejected.
- c) To place the requisition on hold, click the  icon, and the requisition will be hold. **Finance Department use only.**
- d) To delegate or reassign the requisition, click the  icon, and the requisition will be forwarded to another user. **Finance Department use only.**





Schools/Departments Tab

BusinessPlus ? 🔍 SD

Menu ST LOUIS PS TEST

Schools/Departments

School Discretionary's Personal Dashboard General Ledger **Schools/Departments**

- Purchase Requisitions, Ord...**
 - POUPPR Purchase Requests**
 - POUPRC Receiving Information
 - POUPPP PunchOut Web Shopping
- Budget Transfers**
 - GLBUBAUB Create/Update BU Set
- Contracts**
 - CMUPCM Contract Management
 - CMUPTK Contract Tracking
- Workflow Approvals**
 - Go to Workflow Tasklist
 - No tasks
 - Refreshed at Thursday, March 16, 2023 8:18:17 In Office
- Reports**
 - PO3001: Purchase Order Status Inquiry
 - GL5000_SLPS: General Budget to Actual ...



All of your activities in B+ will be conducted using the Schools/Departments Tab



Purchase Requisition Overview

BP **BusinessPlus**
Purchase Requests (POUPPR) ? 🔍 JD

Menu ✕

- 🔍 Search
- 📄 Records
- 🔄 Reselect
- 📖 Field Help
- 📄 About
- 📄 Threaded Notes
- 🔗 Screen Links
- 📎 Attachments
- 📄 Pending Tasks
- 🔄 Reload Record
- 🔄 Revert Changes
- 📄 Save Changes
- 📄 Export to Excel
- 🔧 Tools ▶
- 📄 Layout Management ▶

☰ < > + 🗑️
Edit 1 of 9 📄

PR Number* ⚡

Requested By

Vendor ID 📄

Vendor Name

PO Number ⚡

Date Requested 📅

Ship To ID 📄

FISCAL CONT OFFICER

Status*

Security Code

PO Total

PR Total

Details

Board Res

Bid Number 📄

Deliver To

PO Type* ▾

Blanket Amt

Vend Account

Contract Number

Buyer 📄

Requisition Codes

Req Code 1 ▾

Req Code 2 ▾

☰ + 🗑️
Edit 📄

☑️ ▾	Item Number	Catalog Number	Account	Unit Price	Units	Quantity
✎	0001		GL 150-2191-641101-9720-423000-22	25.00000	EA	1.00



Purchase Requisition

BusinessPlus Purchase Requests (POUPPR) ? Q JD

☰ ↶ Add

PR Number*	<input type="text"/>	PO Number	<input type="text"/>	Status*	PR	Security Code	9780
Requested By	Jason Davis	Date Requested	05/25/2023	PO Total	0.00		
Vendor ID	<input type="text"/>	PR Total	0.00				
Vendor Name	<input type="text"/>			Ship To ID	9780	FISCAL CONT OFFICER	

This page is accessed using the Schools/Departments Tab "Purchase Requisition Section"
There is no longer a line item restriction on Purchase Requisitions.(You can have more than 10 lines)



Purchase Requisition cont'd

Details

Board Res	<input type="text"/>	Vend Account	<input type="text"/>
Bid Number	<input type="text"/>	Contract Number	<input type="text"/>
Deliver To	<input type="text"/>	Buyer	<input type="text"/>
PO Type *	<input type="text" value="P"/>	Blanket Amt	<input type="text" value="0.00"/>

Requisition Codes

Req Code 1	<input type="text"/>	Req Code 2	<input type="text"/>
------------	----------------------	------------	----------------------



This page is accessed using the Schools/Departments Tab "Purchase Requisition Section"



Purchase Requisition cont'd

Items Notes

☰ + 🗑 Edit

☑	Item Number	Catalog Number	Account	Unit Price	Units	Quantity
	0001	700534	GL 150-2219-641101-8470-465010-18	31.95000	EA	48.00
	0002	211047	GL 150-2219-641101-8470-465010-18	1.00000	EA	48.00
	0003	253711	GL 150-2219-641101-8470-465010-18	16.95000	EA	48.00
	0004	2-5258	GL 150-2219-641101-8470-465010-18	9.95000	EA	48.00

Items Notes


☰ < > + 🗑 📄 Edit 1 of 6

Item Number Vendor Item No Quantity Units

Unit Price Extended Amt Catalog Number

Item Description

Guided Math



This page is accessed using the Schools/Departments Tab "Purchase Requisition Section". You can only make edits in the blue grid mode as displayed above. Entries are made in the expanded format on the lower portion of the display.



Purchase Requisition cont'd

[+ Add Account](#) Switch to: [Amount](#) Total: 100% Remaining: 0%

Account							Percent		
GL ▾	FUND	FUNC	OBJ	LOCN	PROJ	YEAR	...	100	Delete

Ship To ID PO Item Number [Lookup LOCN](#)
[Lookup Account](#)

GL Fully Qualified Add
GL Org Key-Object
GL Quick

Show Ledger
Show Job Ledger Side
Show Work Order



This page is accessed using the Schools/Departments Tab "Purchase Requisition Section" You will also have the option to look up the specific account information clicking the ellipsis.



Schools/Departments Tab(BT)

BusinessPlus

Menu

ST LOUIS PS TEST

Schools/Departments

School Discretionary's Personal Dashboard General Ledger **Schools/Departments**

Purchase Requisitions, Ord...

- POUPPR Purchase Requests
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Budget Transfers

- GLBUBAUB Create/Update BU Set**

Contracts

- CMUPCM Contract Management
- CMUPTK Contract Tracking

Workflow Approvals

Go to Workflow Tasklist

No tasks

Refreshed at Thursday, March 16, 2023 8:18:17 In Office

Reports

- PO3001: Purchase Order Status Inquiry
- GL5000_SLPS: General Budget to Actual ...

All of your activities in B+ will be conducted using the Schools/Departments Tab





Budget Transfer

Set Budget Adjustment

+

Set ID Status*

Create User Create Date

Update User Update Date

Set Totals

Total Dr	0.00	Total Cr	0.00	Net	0.00	Record Count	0
Reference Count	0	Budget Increase	0.00	Budget Decrease	0.00		



This page is accessed using the Schools/Departments Tab “Budget Transfer Section”



Budget Transfer cont'd

Main | Notes

☰ Add

Description* Fiscal Year* 2023 Date* 03/14/2023

Account* GL ▾ FUND FUNC OBJ LOCN PROJ YEAR OB ▾ ...

From GL ▾ FUND FUNC OBJ LOCN PROJ YEAR OB ▾ ...

Amount


Transaction Type* ▾ To Account Type From Account Type

Reason ▾ To Balance Type From Balance Type

Budget Version* ▾ Adjustment From Adjustment

Fund Type* ▾

Misc



This page is accessed using the Schools/Departments Tab "Budget Transfer Section"



Schools/Departments Tab (GL5000)

BusinessPlus ? Q SD

Menu ST LOUIS PS TEST

Schools/Departments

School Discretionary's Personal Dashboard General Ledger **Schools/Departments**

Purchase Requisitions, Ord... ↻ 🔒 ▲

- POUPPR Purchase Requests
- POUPRC Receiving Information
- POUPPP PunchOut Web Shopping

Contracts ↻ 🔒 ▲

- CMUPCM Contract Management
- CMUPTK Contract Tracking

Workflow Approvals ↻ 🔒 ▲

Go to Workflow Tasklist

No tasks

Refreshed at Thursday, March 16, 2023 8:18:17 🔌 In Office

Budget Transfers ↻ 🔒 ▲

- GLBUBAUB Create/Update BU Set

Reports ↻ 🔒 ▲

- PO3001: Purchase Order Status Inquiry
- GL5000_SLPS: General Budget to Actual ...**



All of your activities in B+ will be conducted using the Schools/Departments Tab



GL 5000 Budget to Actual

 BusinessPlus

GL5000_SLPS: General Budget to Actual with Encumbrances

Selection Criteria

Enter the Report Date:



Enter the Default Budget Version:

Excel Output ? (Y or N)

Fund (Key Part 01)

Funds to exclude:

Function (Key Part 02):

Location (Key Part 03)

Project (Key Part 05)

Year (Key Part 06)

Object

This page is accessed using the Schools/Departments Tab "Reports Section"



Schools/Departments Tab (Goods Rec)

All of your activities in B+ will be conducted using the Schools/Departments Tab





Goods Receipt

Purchase Order

PO Number*	<input type="text" value="p0026476"/>	Vendor	<input type="text" value="REALLY GREAT READING COMPANY LLC"/>
End Use	<input type="text"/>	Ship To	<input type="text" value="4990"/>

Receiving Information

Date Received*	<input type="text" value="03/14/2023"/>	Carrier	<input type="text"/>	Freight	<input type="text"/>	Packaging	<input type="text"/>
Remarks	<input type="text"/>						

**This page is accessed using the Schools/Departments Tab “Purchase Requisition Section-
“Receiving Information” This lets the system know you have received your order and
Accounts Payable can process payment to the vendor.**





Goods Receipt

Purchase Order Items

Expand All

▶ PO Item: 0001 thinking putty Quantity to Receive: 0 Quantity to Reject: 0 Amount to Receive: 0

▶ PO Item: 0002 sensory balls-3 pk Quantity to Receive: 0 Quantity to Reject: 0 Amount to Receive: 0

**This page is accessed using the Schools/Departments Tab “Purchase Requisition Section-
“Receiving Information”**





Goods Receipt

▼ PO Item: 0001 thinking putty Quantity to Receive: 0 Quantity to Reject: 0 Amount to Receive: 0

PR #	R0038005	PR Item	0001	Notes		Units	EA	Manual
Received To Date	2	Amount To Date	0.00	Quantity Ordered	2	Amount Ordered	7.98	Fully Receive
Serial #		Asset ID		Tag		Brand		
Location				Product		Ship ID		
Catalog	SS7372	Required Date	12:00:00 AM	Requested By	Lisa Brown			
Warehouse								

**This page is accessed using the Schools/Departments Tab “Purchase Requisition Section-”
“Receiving Information”**





Goods Receipt

Receiving Information - Item No: 0001

Quantity Accepted

Quantity Rejected

Amount Accepted

Warehouse

Complete

Done

This page is accessed using the Schools/Departments Tab "Purchase Requisition Section" - "Receiving Information" You can use negative (-) numbers in the quantity rejected field.





Schools/Departments Tab (PO 3001)

BusinessPlus ? 🔍 SD

Menu ST LOUIS PS TEST

Schools/Departments

School Discretionary's Personal Dashboard General Ledger **Schools/Departments**

Purchase Requisitions, Ord... 🔄 🔒 ⬆️

- POUPPR Purchase Requests
- POUPRC Receiving Information
- POUPPP PunchOut Web Shopping

Budget Transfers 🔄 🔒 ⬆️

- GLBUBAUB Create/Update BU Set

Contracts 🔄 🔒 ⬆️

- CMUPCM Contract Management
- CMUPTK Contract Tracking

Workflow Approvals 🔄 🔒 ⬆️

Go to Workflow Tasklist

No tasks

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Reports 🔄 🔒 ⬆️

- PO3001: Purchase Order Status Inquiry**
- GL5000_SLPs: General Budget to Actual ...



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Purchase Order Status Inquiry



 BusinessPlus

PO3001 SLPS: Purchase Order Status Inquiry

Selection Criteria ▼

Enter the Purchase Requisition or Purchase Order Number:

Vendor ID:

Vendor Name:

From Date:

To Date:

Cancel

Submit



This page is accessed using the Schools/Departments Tab “Reports Section” This will allow users to check on the status of the requisition, goods receipt, and if payment has been sent.



Schools/Departments Tab (PunchOut)

BusinessPlus

Menu ST LOUIS PS TEST

Schools/Departments

School Discretionary's Personal Dashboard General Ledger Schools/Departments

Purchase Requisitions, Ord...

- POUPPR Purchase Requests
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- POUPPP PunchOut Web Shopping**

Budget Transfers

- GLBUBAUB Create/Update BU Set

Contracts

- CMUPCM Contract Management
- CMUPTK Contract Tracking

Workflow Approvals

Go to Workflow Tasklist

No tasks

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Reports

- PO3001: Purchase Order Status Inquiry
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PunchOut- New Feature

PunchOut Web Shopping (POUPPP) ? 🔍 JD

PunchOut Vendors

Shop	Vendor ID	Vendor Name
	V60000098	LAKESHORE LEARNING MATERIALS
	V600001131	SCHOOL SPECIALTY LLC
	V600010887	OFFICE ESSENTIALS INC
	V600019065	AMAZON CAPITAL SERVICES INC

Finance Defaults

Account: *

Ship To ID:

Product Code:


Tax Code:

Fixed Asset?:

Ship To Addr:

Security Code: Fiscal Cont Officer

Warehouse:



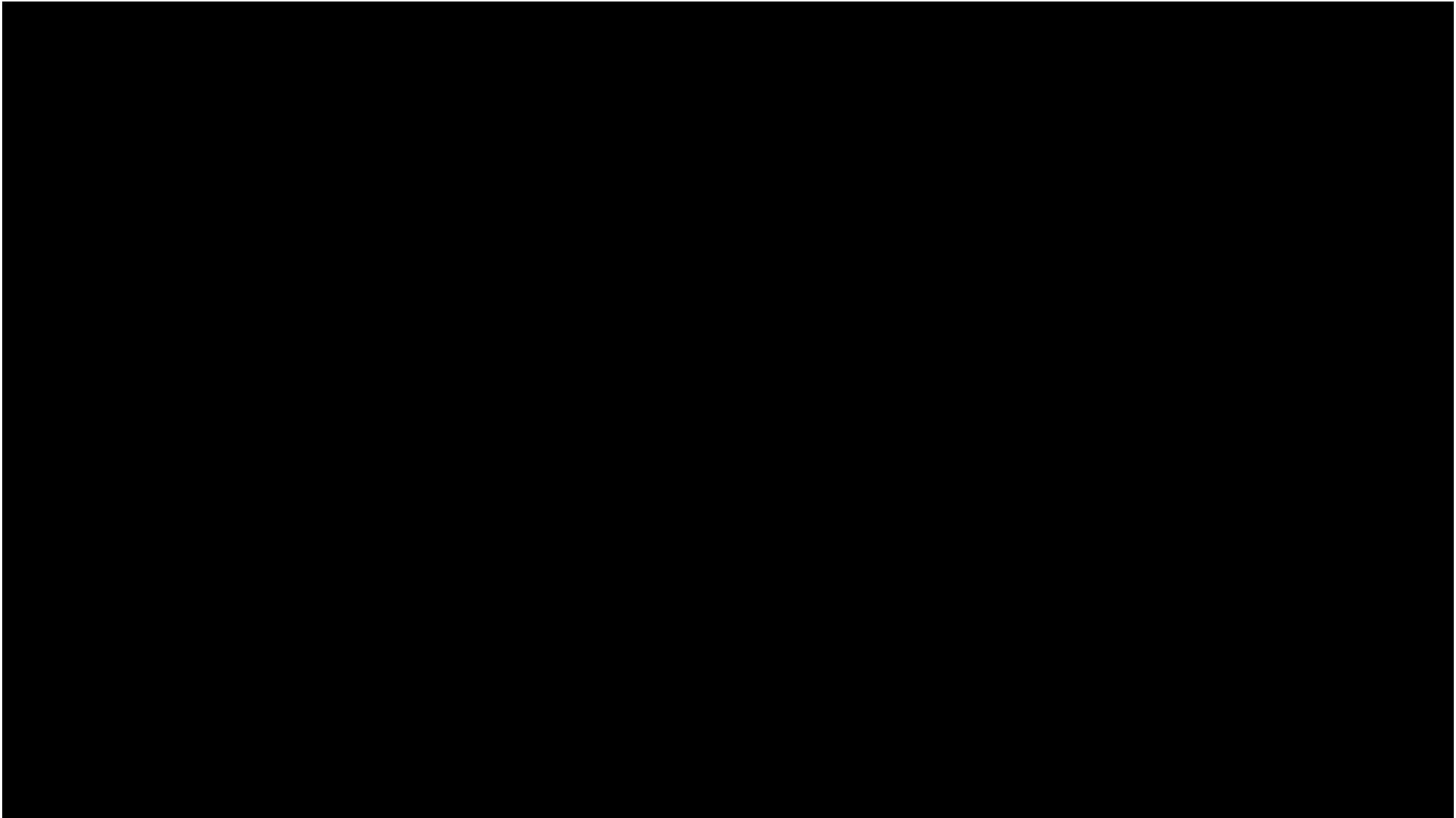
This page is accessed using the Schools/Departments Tab “Purchase Requisition Section”-
“PunchOut Web Shopping”



PunchOut Rules

PunchOut orders can only be ordered by one Object Code i.e. (General Supplies). If you have items that fall under a different object code i.e. (Tech Supplies) then you need to generate a separate PunchOut order. PunchOut orders cannot be changed or edited after you have exited the vendor's site. Finance will reject the Purchase Requisition if you have multiple object code items on a PunchOut order.

PunchOut Video





QUESTIONS?

