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

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

School Discretionary's Personal Dashboard

School Discretionary's Personal Dashboard   Schools/Departments   General Ledger

Complete Menu

CM   Contract Management

GL   General Ledger

PO   Purchasing

SI   Stores Inventory

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

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

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

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

Pending Tasks – Approval

a) To approve the requisition, click the **✔ Approve** icon, the requisition will then route to the next line of approval.

b) To decline the requisition, click the **✖ Reject** icon, and the requisition will be rejected.

c) To place the requisition on hold, click the **🖐 Hold** icon, and the requisition will be hold. **Finance Department use only.**

d) To delegate or reassign the requisition, click the **➔ Forward** icon, and the requisition will be forwarded to another user. **Finance Department use only.**

Schools/Departments Tab

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

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Purchase Requisition Overview

Purchase Requisition

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		Vend Account	
Bid Number		Contract Number	
Deliver To		Buyer	
PO Type *	P	Blanket Amt	0.00

Requisition Codes

Req Code 1		Req Code 2

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

Purchase Requisition cont'd

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

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)

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

Budget Transfer

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

Budget Transfer cont'd

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

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Schools/Departments Tab (GL5000)

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

GL 5000 Budget to Actual

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*	p0026476	Vendor	REALLY GREAT READING COMPANY LLC
End Use		Ship To	4990

Receiving Information

Date Received*	03/14/2023	Carrier		Freight		Packaging	

Remarks

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_"

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Goods Receipt

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)

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

Purchase Order Status Inquiry

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)

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

PunchOut- New Feature

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

PunchOut Rules

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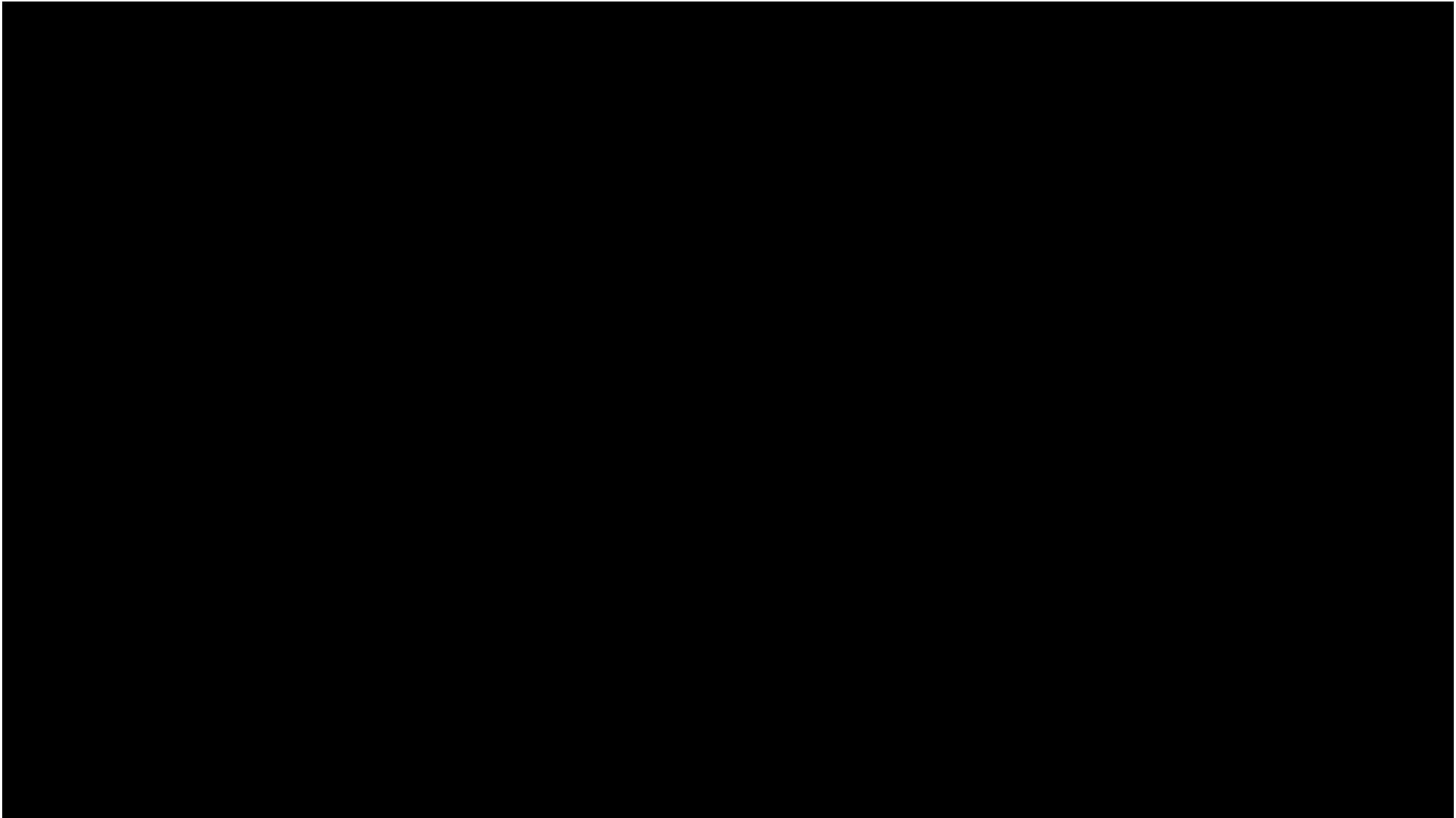bject code i.e. (Tech Supplies) then you need to generate a separate PunchOut order. PunchOut orders <u style="color:red">cannot</u> be changed or edited after you have exited the vendor's site. <u style="color:red">Finance will reject the Purchase Requisition if you have multiple object code items on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

PunchOut Video

QUESTIONS?