Procure to Pay

9.2 PantherSoft Financials

The **Procure to Pay** process begins with submitting a **Requisition** for goods/services in PantherSoft via the eProcurement navigation. There are TWO ways to shop for goods and services. The first, and the option you will want to ALWAYS choose first, is through the **myFIUmarket** and use the supplier’s catalogs. These vendors and all the items in their catalogs have been pre-approved for FIU purchasing. Your turn around time for ordering the goods will be much faster. When your Requisition is approved it will source right to a Purchase Order.

When what you are shopping for is not available in **myFIUmarket**, then use **“Special Requests – Create a Non-Catalog Request”**. Enter all the required information into a blank Requisition form – the item, supplier, accounting, etc.. After it’s been approved, the requisition automatically routes to a buyer to be sourced to a Purchase Order.

Once the goods/services are received, the department must create the **Receipt** in PantherSoft.

If a department receives **Invoices** from the supplier, they should be forwarded to Accounts Payable in a timely manner so the supplier can be paid.

---

**myFIUmarket**

1—After logging into PantherSoft Financials, navigate to **eProcurement -> Requisition**

2—Click **myFIUmarket**

When creating a requisition ALWAYS search the **myFIUmarket** first.

---

---

1—**Banner** - User Profile, Action Items, Notifications, Shopping Cart, Quick Search Option

2—**Navigation Bar** - Hover your mouse over each of the buttons to access a fly-out menu

3—**Shop** — Search the market suppliers

4—**Message Area** — messages from the Purchasing Department

5—**Product Showcase** — quick links for supplier catalogs
Launch directly to the supplier’s website by choosing a Supplier’s button (#5). Or use the Shop field (#3) to search all of the supplier’s sites for items. In this example we used the Shop field to lookup “paper towels”:

Select Order From Supplier next to the item you want and you will be re-directed to the supplier’s website.

NOTE* The exact steps to creating a shopping cart will vary with each supplier’s website. The basic steps are - add items to your shopping cart and then view the cart to checkout or submit. The items you selected will transfer into PantherSoft and myFIUmarket.

You can give the cart a name that is descriptive of what it contains.

Then click “Proceed To Checkout”

Click “Place Order”

Finish the Review & Submit page to complete the order (page 3).
1—**Requisition Settings**—Ship To & Accounting information can be updated for the entire requisition by clicking on Requisition Settings.

2—**Note** Ship To & Accounting can be adjusted at the **Line-Level** by clicking on the gray triangle next to the line selection box.

3—**Details**—Allows users to note details like: buyer info, Amount Only, RFQ

**Save & Submit** the requisition when finished. This triggers approval workflow. Be sure to Check Budget *after* submitting. Budget Checking before submitting the requisition will result in an error.
**Special Requests - Create a Non-Catalog Request**

To request a non-market item, choose "Special Requests – Create a Non-Catalog Request". Enter all the required information into a blank Requisition form – the item, supplier, accounting, etc. After it’s been approved, the requisition automatically routes to a buyer to be sourced to a Purchase Order.

---

1. After logging into PantherSoft Financials, navigate to eProcurement -> Requisition
2. Click Special Requests

When creating a requisition ALWAYS search the myFIUmarket first.

---

1. Complete all of the required fields
2. Click Add To Cart. Another blank Create Requisition page will open to add additional items to the cart. The items can be seen in the cart at the top of the screen.
3. Click Checkout when ready to complete.

Finish the Review & Submit page to complete the order (page 3).
Receiving

As soon as the goods/services are received, a Receipt should be completed in PantherSoft using the Purchase Order number. The original invoices must be sent to Accounts Payable. Finalizing the Three Way Matching—Purchase Order, Receipt and Invoice—is mandatory in order for a supplier to be paid.

1—Navigate to eProcurement -> Receive Items.
2—Click Add New Receipt.
3—Click Add.

1—Clear all of the search criteria except PO Unit FIU01
2—Click Search to view a list of open purchase orders
3—Select the purchase order to be received
4—Click OK

1—Enter the amount or quantity received
2—Click Save

This is an outline of the Requisition process. To understand the full process, users should attend Procure to Pay training and refer to the Proceed to Pay Manual.