



# OMNI - Auxiliary AR / Billing - Postal Services

## Placing an Order

Purchase orders must be established prior to using the [Postal Services Charge Slip App](#) or the [UPS iShip system](#). In general, it will take 24 hours for a Purchase Order to become available in the Charge Slip App. Please be sure to plan ahead by creating your requisitions for Postal Services during the pre-entry window or at the start of the Fiscal Year (i.e. before you plan on needing UPS or postal services).

## Creating a Requisition: Overview

The following notes should be considered when creating your Postal Services requisition.

- When creating requisitions for mass mailings of any type it is important to encumber funds for returned mail. Departments are charged for all mail returned to the University. For additional information, including estimating returned mail expenses for a mailing, please contact Postal Services at [postal@fsu.edu](mailto:postal@fsu.edu).
- If your mail order includes any type of Business Reply request, you must encumber funds to pay returned postage which utilizes the University’s Business Reply permit.
- Items paid at the UPS Store on campus are not an internal purchase; those are paid to the operator of the UPS Store location and not to Business Services. Typically, those items are paid for with a University Purchasing Card or an external PO using a non-AUX vendor.

## Creating a Requisition: Detailed Steps

1. Determine your requisition amount as described separately. Your department’s Budget Account Manager may have already performed this task for you.
2. Navigate to page: <https://my.fsu.edu> > “FI” > Main Menu > eProcurement > Requisitions as shown below.





- You will land on the **Requisition Settings** page. Click the magnifying glass to the right of the “Supplier” field to look up your supplier.

**Requisition Settings**

Business Unit: FSU01  Florida State University Requisition Name:

\*Requester: HFORLONG  Heather Forlong Priority: Medium

\*Currency: USD

**Line Defaults**  ?

Note: The defaults specified below will be applied to requisition lines.

Supplier:   Category:

Supplier Location:   Unit of Measure:

**Shipping Defaults**

Ship To: SWJB1032   Add One Time Address

Due Date:   Attention:

**Accounting Defaults** Personalize | Find |   First 1 of 1 Last

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Sou
<input type="text"/>	SWJB1032 <input type="text"/>	FSU01 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

- Search for your supplier. All internal suppliers will begin with “AUX.” Type “AUX” in the Supplier ID field and select “Find.” The search results will show a list of internal suppliers. Select the appropriate supplier.
  - You must enter a supplier that begins with AUX. For this requisition, the appropriate supplier is:
    - AUX0000003 OBS Postal Services

**Supplier Search**

Supplier ID: AUX   Find  Reset

Name:

Short Supplier Name:

Alternate Supp Name:

City:

Country:   State:

Postal Code:



**Search Results** Personalize | Find | View All | [Print] [Calendar] First 1-6 of 6 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
1	AUX0000002	OBS Copy Program	001	Main	Florida State University	Tallahassee	FL	[Print]
2	AUX0000003	OBS Postal Services	001	Main	Florida State University	Tallahassee	FL	[Print]
3	AUX0000006	FSU Card Center	001	Main	Florida State University	Tallahassee	FL	[Print]
4	AUX0000007	Parking and Transportation	001	Main	Florida State University	Tallahassee	FL	[Print]
5	AUX0000008	Warehouse	001	Main	Florida State University	Tallahassee	FL	[Print]
6	AUX0000009	FSU Information Technology Service	001	MAIN	296 Champions Way	Tallahassee	FL	[Print]

OK Cancel Refresh

5. The system will bring you back to the **Requisition Settings** page with the supplier information included.

**Requisition Settings**

Business Unit: FSU01  Florida State University Requisition Name:

\*Requester: HFORLONG  Heather Forlong Priority: Medium

\*Currency: USD

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**Line Defaults**

Supplier: AUX0000003  Category:

Supplier Location: 001  Unit of Measure:

---

**Shipping Defaults**

Ship To: SWJB1032  Add One Time Address:

Due Date:  Attention:

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**Accounting Defaults** Personalize | Find | [Print] [Calendar] First 1 of 1 Last

Chartfields1 | Details | Asset Information

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source
<input type="text"/>	SWJB1032 <input type="text"/>	FSU01 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh



6. Choose a Unit of Measure. For internal requisitions, always choose "EA."

**Requisition Settings**

Business Unit  Florida State University Requisition Name

\*Requester  Heather Forlong Priority

\*Currency

**Line Defaults**

Supplier  Category

Supplier Location  **Unit of Measure**

**Shipping Defaults**

Ship To  [Add One Time Address](#)

Due Date  Attention

**Accounting Defaults** Personalize | Find | First 1 of 1 Last

Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source
<input type="text"/>	<input type="text" value="SWJB1032"/>	<input type="text" value="FSU01"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OK Cancel Refresh

7. Enter a due date. For year-long, open ended PO's such as what would be typical for this line of business, use 6/30 of the appropriate fiscal year.

**Requisition Settings**

Business Unit  Florida State University Requisition Name

\*Requester  Heather Forlong Priority

\*Currency

**Line Defaults**

Supplier  Category

Supplier Location  Unit of Measure

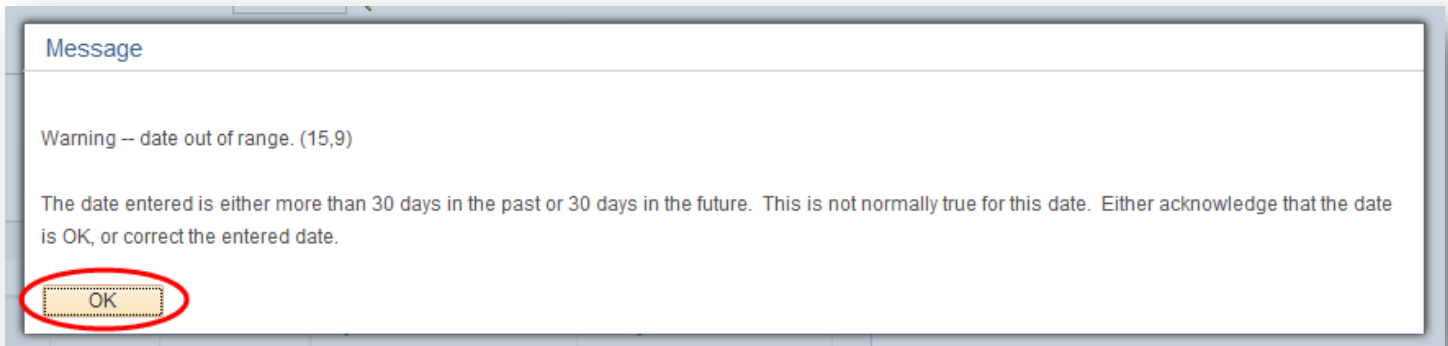
**Shipping Defaults**

Ship To  [Add One Time Address](#)

Due Date  Attention

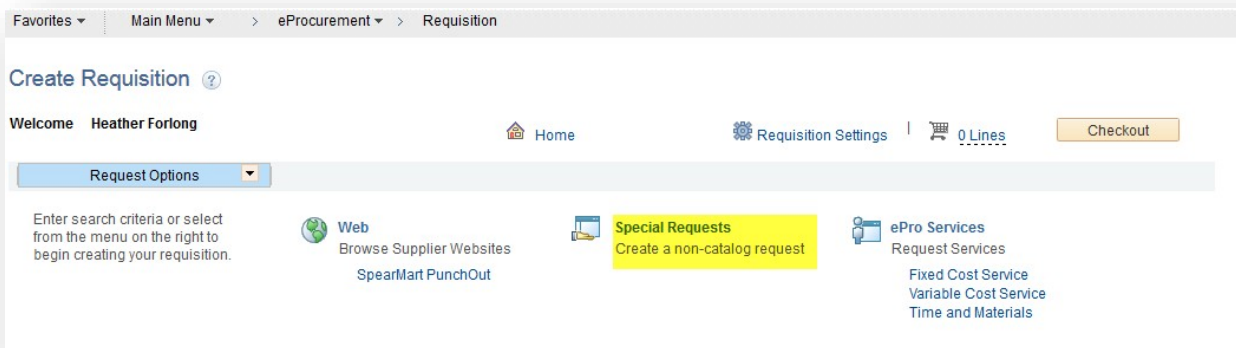


8. If you receive the following warning message after entering the date, click “OK”:



9. Select “OK” at the bottom of the page.

10. You will be returned to the **Create Requisition** Page. Select “Special Request” to begin adding the individual lines for your requisition (if you are directed to the Requisition Settings page again after selecting Special Requests, click “OK” to proceed).





11. Create line(s) for your services as appropriate.

- a. Enter the item description as desired.
- b. Enter Price & Quantity:
  - i. Price: equal to the amount you expect to spend in the category for the PO duration
  - ii. Quantity: 1 – **Note: quantity should always equal 1**
- c. Category Codes: select from the category codes listed below.
  - i. *Contact Postal Services ([postal@fsu.edu](mailto:postal@fsu.edu)) with questions about what each category code is for.*
  - ii. *Contrary to instructions given in June 2016, you do not need to populate all lines using \$0 amounts when not using, nor are you required to put the lines in any specific order (updated October 2016).*

Category Code	Description
AUX_MAIL0000001	Domestic Mail (Charge slip mail, domestic)
AUX_MAIL0000002	International Mail (Charge-slip mail, international)
AUX_MAIL0000003	UPS (UPS mail through iShip or charge-slip, not UPS store)
AUX_MAIL0000004	Standard Mail Prep (for special batch mailings)
AUX_MAIL0000005	Business Reply (when you request that recipients return items to you at your cost)
AUX_MAIL0000006	Return Mail (items returned to you due to incorrect address/undeliverable)
AUX_MAIL0000007	Standard Postage (used with batch mailings; postage for batch mail jobs)

- d. Add notes as needed in the “Additional Information” field. This information is for your research purposes only.



**Create Requisition** ?

Welcome Heather Forlong Home Requisition Settings | 0 Lines Checkout

Request Options

All Request Options

**Special Requests**

ePro Services

- Fixed Cost Service
- Variable Cost Service
- Time and Materials

**Special Requests** ?

Enter information about the non-catalog item you would like to order.

**Item Details**

\*Item Description

\*Price  Currency USD

\*Quantity  \*Unit of Measure

\*Category  Due Date

**Supplier**

Supplier ID

Supplier Name  OBS Postal Services Suggest New Supplier

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

Add to Cart

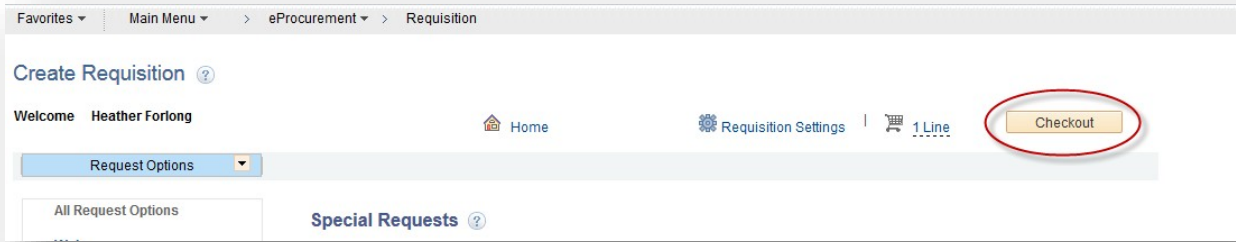
12. When ready, select "Add to Cart" at the bottom of the page.



13. You will see a screen for a new, blank line. Create additional lines as needed for other Postal Services category codes. For example, add a line for returned mail or add lines for additional budgets under your area of responsibility (note: projects must be on their own requisitions).



14. When lines for all applicable postal services have been added and you are ready to check out, select “Checkout” at the top of the page:



15. You will be returned to the **Checkout – Review and Submit** page.

16. Flag all of the requisition lines as “Amount Only” as shown below. **This is important: without this step, your PO encumbrance will not be correct after your PO is expended.**

a. Select the icon in the “Details” column for the line:

Expand lines to review shipping and accounting details + Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	Domestic Mail		OBS Postal Services	1.0000	Each	1500.0000	1500.00		ⓘ Add	🗑
▶ <input type="checkbox"/> 2	Returned Mail		OBS Postal Services	1.0000	Each	500.0000	500.00		ⓘ Add	🗑

b. On the “Line Details” page, select the checkbox for “Amount Only.”

**Line Details**

Line Details ?

No Image      Line      1 Domestic Mail      Line Status      Open

▼ Item Details ?

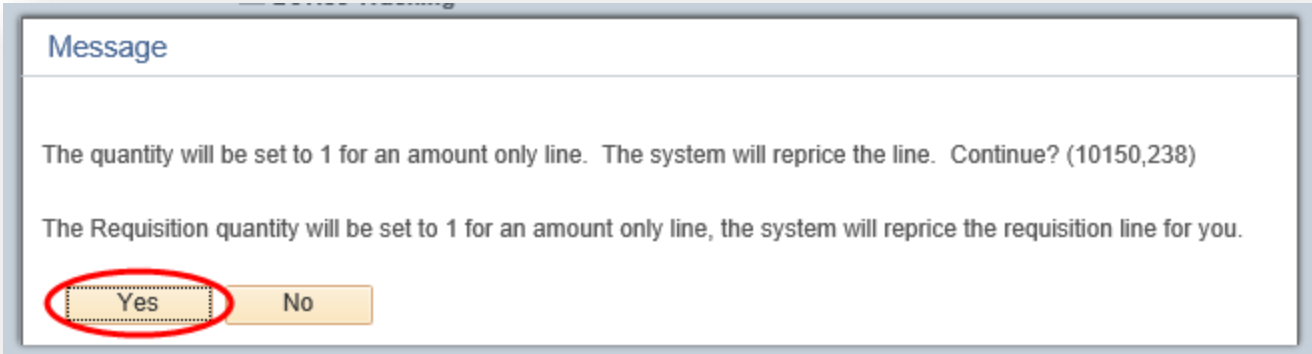
Merchandise Amount	1500.00 USD	<input type="checkbox"/> RFQ Required
Item ID		<input type="checkbox"/> Device Tracking
Category	AUX_MAIL0000001	<input type="checkbox"/> Zero Price Indicator
Original Substituted Item Description		<input type="checkbox"/> Stockless Item
Physical Nature	Goods <span>▼</span>	<input checked="" type="checkbox"/> Amount Only
Buyer	CRAYNE <span>🔍</span>	<input type="checkbox"/> Inspection Required

[Buyer Information](#)  
[Configuration Info](#)





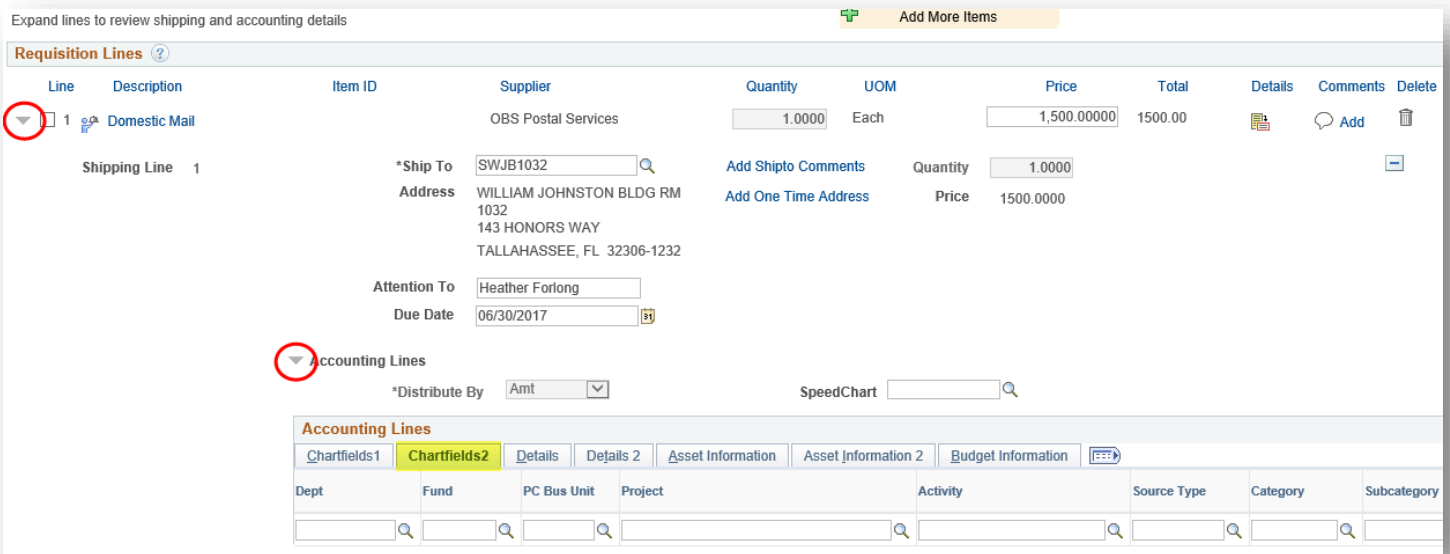
- c. Scroll to the bottom of the page and select "OK."
- d. A message will pop up indicating that your quantity will be set to 1; this is ok. Select "Yes."



- e. Repeat steps a – d for all lines.

17. Enter your accounting information (department ID, fund, project) as shown below:

- a. Expand all lines using the small grey arrows and then select the "Chartfields 2" tab:





b. Enter the appropriate department ID, fund and project combination in the Chartfields 2 tab.

i. **NOTE: A project must be on its own requisition. A requisition can not include multiple projects or a project and multiple non-project funds.**

ii. A requisition can include multiple non-project combinations (including optional chartfields).

Expand lines to review shipping and accounting details Add More Items

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total
1	Domestic Mail		OBS Postal Services	1.0000	Each	1,500.00000	1500.00
Shipping Line 1		*Ship To	SWJB1032	Add Shipto Comments		Quantity	1.0000
		Address	WILLIAM JOHNSTON BLDG RM 1032 143 HONORS WAY TALLAHASSEE, FL 32306-1232	Add One Time Address		Price	1500.0000
		Attention To	Heather Forlong				
		Due Date	06/30/2017				

Accounting Lines

\*Distribute By: Amt SpeedChart

**Accounting Lines**

Chartfields1 | **Chartfields2** | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information

Dept	Fund	PC Bus Unit	Project	Activity	Source Type
197000	110				

c. Repeat steps a and b for all lines.

18. Review your requisition.

19. When reviewed and ready to submit for approval, click **Save and Submit** at the bottom of the page:

Check Budget

**Save & submit** | Save for Later | Add More Items | Preview Approvals

20. The standard approval workflow will be initiated. Once the requisition is fully approved, it will become a purchase order and will be dispatched to the vendor when the applicable system processes run throughout the day.