



OMNI - Auxiliary AR / Billing - Postal Services

Placing an Order

Purchase orders must be established prior to using the [Postal Services Charge Slip App](#)*. 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 FedEx or postal services).

* Use this option to send FedEx **only** if you are **not** set up in the FedEx Ship Manager online system. Frequent shippers should email [FSU Postal Services](#) to request a FedEx Ship Manager invitation. If using FedEx services, the department will need to sign up with FedEx and create an account. **Departments can go to the [FSU Postal Website](#) or contact Postal services at postal@fsu.edu for any questions on setting up an account with FedEx.

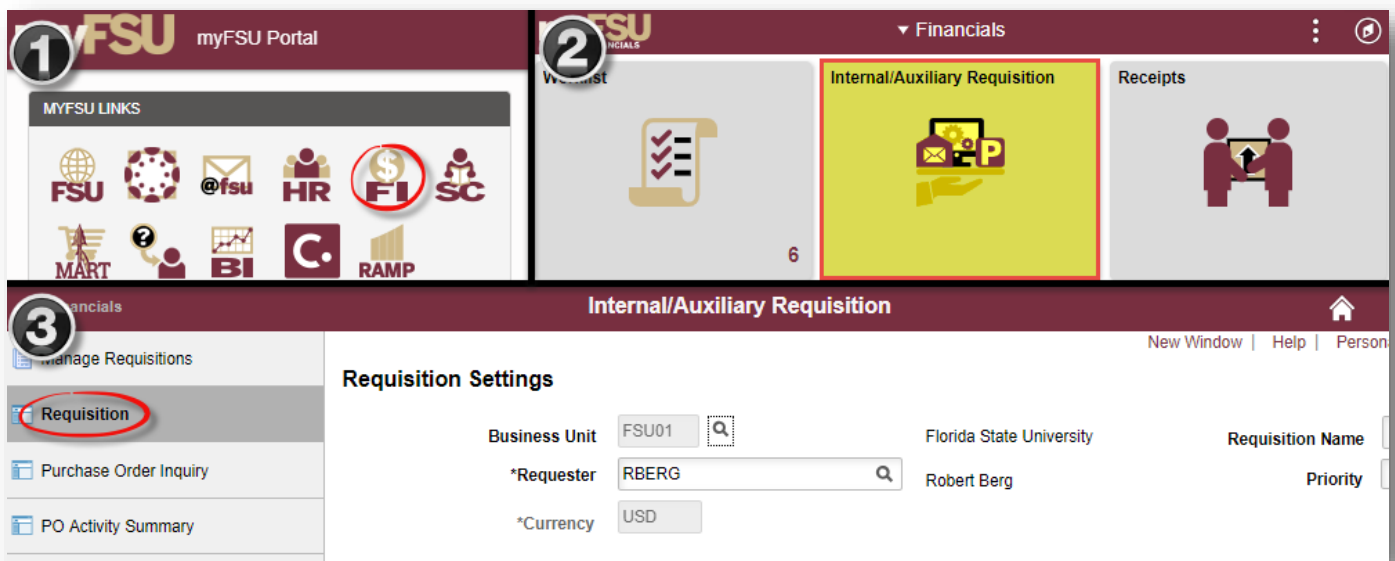
Creating a Requisition: Overview

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.
- 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.

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” > Internal/Auxiliary Requisition > Requisition 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: RBERG Robert Berg 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: SFAB220 Add One Time Address

Due Date: Attention:

Accounting Defaults

Chartfields1 | Details | Asset Information

Dist	Percent	Location	GL Unit	Dept	Fund	PC Bus Unit	Project	Activity	Source T
1	<input type="text"/>	SFAB220 <input type="text"/>	FSU01 <input type="text"/>	196000 <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 & 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 “AUX000003 | OBS Postal Services”

Supplier Search

Supplier ID: AUX

Name:

Short Supplier Name:

Alternate Supp Name:

City:

Country: State:

Postal Code:



Search Results

		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input type="radio"/>	1	AUX0000002	OBS Copy Program	001	Main	Florida State University	Tallahassee	FL	
<input checked="" type="radio"/>	2	AUX0000003	OBS Postal Services	001	Main	Florida State University	Tallahassee	FL	
<input type="radio"/>	3	AUX0000006	FSU Card Center	001	Main	Florida State University	Tallahassee	FL	
<input type="radio"/>	4	AUX0000007	Parking and Transportation	001	Main	Florida State University	Tallahassee	FL	
<input type="radio"/>	5	AUX0000008	Warehouse	001	Main	Florida State University	Tallahassee	FL	

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

*Requester: RBERG Robert Berg

*Currency: USD

Requisition Name:

Priority:

Line Defaults

Supplier: AUX0000003 Category:

Supplier Location: 001 Unit of Measure:

6. Choose a Unit of Measure. **Always choose "EA" for internal requisitions.**

Requisition Settings

Business Unit: FSU01 Florida State University

*Requester: RBERG Robert Berg

*Currency: USD

Requisition Name:

Priority:

Line Defaults

Supplier: AUX0000003 Category:

Supplier Location: 001 Unit of Measure: EA



- 7. Enter a due date. For year-long, open ended PO's such as what would be typical for this line of business, use **06/30** of the appropriate fiscal year.

Requisition Settings

Business Unit: FSU01 Florida State University Requisition Name: _____
 *Requester: RBERG Robert Berg Priority: _____
 *Currency: USD

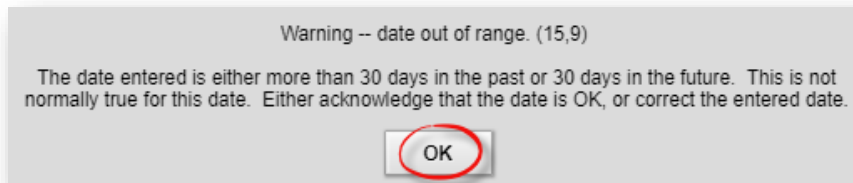
Line Defaults

Supplier: AUX0000025 Category: _____
 Supplier Location: 001 Unit of Measure: EA

Shipping Defaults

Ship To: SFAB220 Add One Time Address: _____
 Due Date: 06/30/2019 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 Requests" 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).

Create Requisition

Welcome Robert Berg

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options

Enter search criteria or select from the menu on the right to begin creating your requisition.

Special Requests
Create a non-catalog request

Favorites
Browse Favorite Items and Services

ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials



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 plan to spend for the PO duration
 - ii. Quantity: 1 – **Note: quantity should always equal 1**
- c. **Search for your Category Code(s).** Type “AUX_MAIL” into the Category field & select the magnifying glass to search for the category code. It is very important that you select the appropriate internal category code.
 - i. For this requisition, choose from the following Category Codes as shown below:

Category Code	Description	Expense Account
AUX_MAIL000001	Domestic Mail (Charge slip mail, domestic)	741501
AUX_MAIL000002	International Mail (Charge-slip mail, international)	741502
AUX_MAIL000003	FedEx (FedEx mail through a Department’s FedEx Account)	741503
AUX_MAIL000004	Standard Mail Prep (for special batch mailings)	741504
AUX_MAIL000005	Business Reply (when you request that recipients return items to you at your cost)	741507
AUX_MAIL000006	Return Mail (items returned to you due to incorrect address/undeliverable)	741508
AUX_MAIL000007	Standard Postage (used with batch mailings; postage for batch mail jobs)	741506

IMPORTANT: In order for a department to print charge-slips for domestic mail, international mail, and/or FedEx, the requisition must have a line with the corresponding category code.

- d. If needed, add notes in the “Additional Information” field. This will be for your research purposes only.

The screenshot shows the 'Special Requests' form with the following fields filled out:

- Item Details:**
 - *Item Description: Domestic Mail
 - *Price: 100
 - *Quantity: 1
 - *Category: AUX_MAIL000001
 - *Currency: USD
 - *Unit of Measure: EA
 - Due Date: (calendar icon)
- Supplier:**
 - Supplier ID: AUX0000003
 - Supplier Name: OBS Postal Services
 - Supplier Item ID: (empty)
- Additional Information:** (empty text area)
- Options:**
 - Send to Supplier
 - Show at Receipt
 - Show at Voucher
- Buttons:** Add to Cart

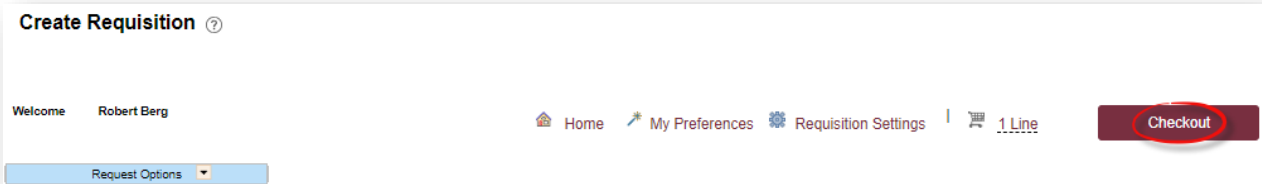


12. When you are ready, select “Add to Cart” at the bottom of the page.



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 & you are ready to check out, select “Checkout” at the top of the page:



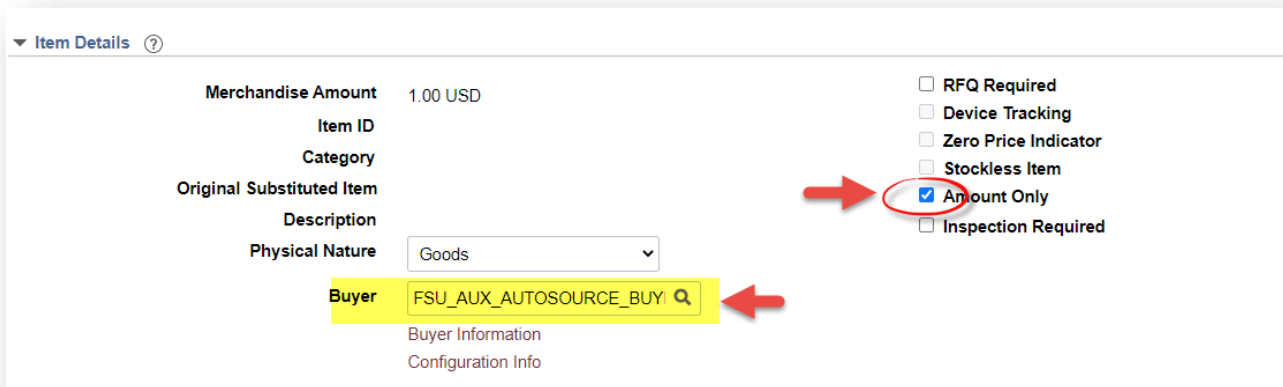
15. You will be returned to the **Checkout – Review & Submit** page.

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:

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Domestic Mail		OBS Postal Services	1.0000	Each	100.0000	100.00		Add	

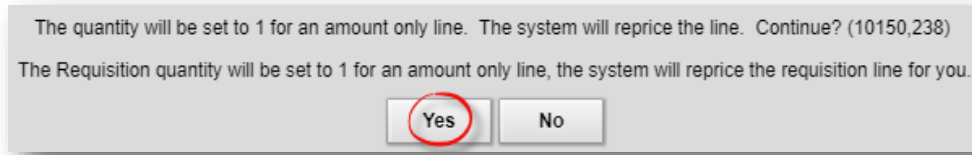
b. On the “Line Details” page, select the checkbox for “Amount Only.” Additionally, the Buyer field **MUST** remain as “FSU_AUX_AUTOSOURCE_BUYER.”



c. Scroll to the bottom of the page & 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) through (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 & then select the “Chartfields2” tab:

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Domestic Mail		OBS Postal Services	1.0000	Each	100.00000	100.00	

Shipping Line 1

*Ship To: SFAB220

Address: FINE ARTS BLDG, 540 W CALL ST, TALLAHASSEE, FL 323061150

Attention To: Robert Berg

Due Date: [Calendar Icon]

Accounting Lines

*Distribute By: Amt

SpeedChart: [Search]

Accounting Lines

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

Dept	Fund	PC Bus Unit	Project	Activity	Source Type
[Search]	[Search]	[Search]	[Search]	[Search]	[Search]

b. Enter the appropriate department ID, fund & project combination in the Chartfields2 tab.

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

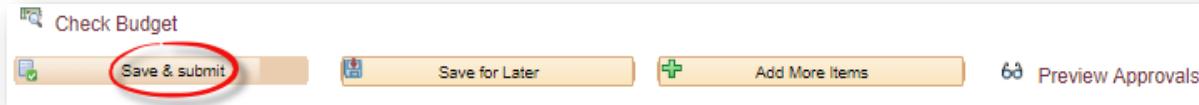
ii. A requisition can include multiple non-project combinations (including optional chartfields).

Dept	Fund	PC Bus Unit	Project	Activity	Source Type
196000	110				

c. Repeat steps (a) & (b) for all lines.



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



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