

# Introduction to IMOs (Intramural Orders) – Suppliers

## Last Updated April 12, 2006

### Overview

Intramural Orders (IMOs) are for a single, one-time purchase. An IMO should be used to record sales of goods or services provided by University service centers.

### Filling/Supplying an IMO

#### Document create 1

Fill document 10\_\_\_\_\_ exactly as ordered.

We will use account 215555-0800 as the supplier account number and sub code.

#### From the menu select:

Financial, Documents, Work on Existing Documents, IMO Supplier Fill

All documents available for you to fill will be listed.

IMO Supplier Fill

FMISF056 Financial Management Information System Page 1 of 1

Document #:  (If full document number is selected, the rest of the selection criteria will be ignored.)

Account #:  Subcode:  Ordered by Dept #:

Enter any field or fields. Partial fields may be entered. If nothing is entered, all supplier documents will be listed.

| Doc #  | Ordered by Name | Ordered by Dept   | Start Date | Status   |
|--------|-----------------|-------------------|------------|----------|
| 101220 | TRAIN1          | TRAINING DEPT 122 | 11/14/2005 | Approved |
| 101221 | TRAIN1          | TRAINING DEPT 122 | 11/15/2005 | Approved |
|        |                 |                   |            |          |
|        |                 |                   |            |          |
|        |                 |                   |            |          |
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### Document Search

\*\*If there is a long list of documents, you can search using the top ¼ of the screen:

**Document #:**  (If full document number is selected, the rest of the selection criteria will be ignored.)

**Account #:**  **Subcode:**  **Ordered by Dept #:**

Enter any field or fields. Partial fields may be entered. If nothing is entered, all supplier documents will be listed.

**To view a specific document** – input the document number or portion of the number in the DOCUMENT # field and press PROCESS SEARCH button.

**To view documents for a specific account** – input the entire account number OR a portion of the account number in the ACCOUNT # field. (Example: to view document on accounts 135000 – 135999, input 135). Press the PROCESS SEARCH button.

**To view documents for a specific sub code** – input the entire sub code OR a portion of the sub code in the ORDERED BY DEPT field. Press the PROCESS SEARCH button.

**To view documents from a specific department** – input the department number OR a portion of the department number in the ORDERED BY DEPT field, press the PROCESS SEARCH button.

When you find the appropriate document, highlight, and then click on the Process Document button. Page 1 of the document will appear.

Fill IMO Order

FMISF054 Financial Management Information System Page 1 of 2

Doc #: 101219 Date Created: 11/14/2005 08:49:03

Prepared by

| Name   | Dept | Phone         |
|--------|------|---------------|
| TRAIN1 | 8023 | (970)491-5916 |

Ordered by

| Name   | Dept | Phone         |
|--------|------|---------------|
| TRAIN1 | 2029 | (970)491-5916 |

Deliver to Information

| Name          | Dept | Phone         |
|---------------|------|---------------|
| Not delivered | 2029 | (970)491-0000 |

Line 1:  Line 2:   
Line 3:  Line 4:

City: Campus State: CO Zip: 80523 Country: USA

Tolerance: 20.0000 Start Date: 11/14/2005  Verify?  Priority?  Comments?

Enter Comments Page 2

See box on page 3 for information pertaining to the Deliver to Information, Tolerance and Start Date.



## Introduction to IMOs (Intramural Orders) – Suppliers

### Last Updated April 12, 2006

#### Document Create 2

Fill document 10\_\_\_\_\_ over tolerance.

This document has 0% tolerance.

The supplier unit price should be input as double the ordered cost (\$20).

Use account 215555-0800 as the supplier account number and sub code.

After completing the IMO, press the FINISHED ORDER button.

A popup box will appear.

See note below on OVER TOLERANCE-SELLERS. Read this information and decide whether to accept or reject the over tolerance.

#### **OVER TOLERANCE - SELLERS**

If you process a document that is over tolerance, you're given the choice to either accept this condition or reject it.

**Accepting** means taking the risk that the buying department will accept the overage. The ordering department will need to re-approve these documents. Your account will not receive any revenue until they do. (This sends it back to buyer – Documents – Act on Pending)

**Rejecting** means that the document stays on your screen until you contact the buying department and make the necessary changes. This gives you a chance to discuss the situation with them before finishing the process.

#### Document Create 3

Fill document 10\_\_\_\_\_ with more than one account number.

This document has one ordered line with one account number.

You want to put the revenue in two accounts.

- Fill line 1 with the supplier quantity as 5 (1/2 the order).
- The supplier unit price should be the same as the ordered unit price.
- Use account 215555-0800 as the supplier account number and sub code on line 1.
- Go to line 2 and press the shift-F6 key to duplicate line 1.
- Change the sub code on line 2 to 0801.
- On this exercise, you put ½ the order in one account and ½ in another.  
On an actual IMO, you can split the revenue in 2 (or more) accounts as you need to.
- After completing the IMO, press the FINISHED ORDER button.

#### **Filling to More Than One Account:**

You may wish to split the revenue from one ordered line, into two lines. First fill in info for line that needs to be split, and then place your cursor on the line below the line you wish to split.

Press the shift F6-key to copy the line. Save.

Make the changes to the fields - supplier quantity, unit price and/or revenue account. Save.

To split the revenue into a third account, repeat the above steps.

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## Last Updated April 12, 2006

### Other Issues

#### **Zero Fill (Can't Fill Line or Entire IMO) – Seller:**

From the Documents, Work on Existing Documents, IMO Supplier Fill screen, select your document to process:

- Enter zero as the supplier quantity.
- Enter zero as the supplier unit price.
- Enter the supplier account and sub code.
- Click on the FINISHED ORDER button.

#### **Cheat Sheet:**

You may wish to create a “cheat sheet” for your buyers.

This could contain:

- contact names, phone numbers, email addresses
- where walk in orders should be placed
- your business hours
- how to obtain current prices for the goods and services you sell
- what information you want displayed in the description field
- special text information you want input in the “COMMENTS” area of the document
- other information pertinent to your area

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## Last Updated April 12, 2006

### Inquiry

Go to Financial, Documents, Inquire/Print...Documents, IMO Inquiry

From this screen you can inquire on IMO's by entering information into the boxes in the top portion, checking one or more of the boxes below, then clicking the Process Selections button.

| FMISF068  | Financial Management Information System    | Page 1 of 1                         |
|---|--|-------------------------------------|
| <b>IMO Search Criteria</b>                          |  |                                     |
| Document Number:                                    | <input type="text"/>                       |                                     |
| Account #:  | <input type="text"/>                       |                                     |
| Date Created:                                       | <input type="text"/> ↓                     | to <input type="text"/> ↓           |
| Dept #:   | <input type="text"/>                       |                                     |
| Ordered By:   | <input type="text"/>                       |                                     |
| Prepared By:  | <input type="text"/>                       |                                     |
| Deliver To:   | <input type="text"/>                       |                                     |
| Supplier Name:                                      | <input type="text"/>                       |                                     |
| <b>Inquire About</b>                                |  |                                     |
| <input type="checkbox"/> Approval History           | <input type="checkbox"/> Document Comments |                                     |
| <input type="checkbox"/> Approvals Pending          | <input type="checkbox"/> Print Document    |                                     |
| <input type="checkbox"/> Document                   | <input type="checkbox"/> Status History    |                                     |
| <input type="button" value="Process Selection(s)"/> |  | <input type="button" value="Exit"/> |

From this screen you can inquire on:

**Approval History** – see who approved an IMO and when

**Approvals Pending** – see a listing of people who can approve an IMO

**Document** – see a copy of an IMO

**Document Comments** – see comments or add comments to an IMO. To add a comment, start a new line.

**Print Document**

**Status History** – see who created, approved, or filled an IMO