PP No.: 602B
Section: Purchasing
Subject: Procedure, Order Non-D365 M&S
Approved By: Tony Massey
Effective Date: December 21, 2021
Last Reviewed Date: May 8, 2026
Policy Owner: Senior Director of Purchasing

PURPOSE

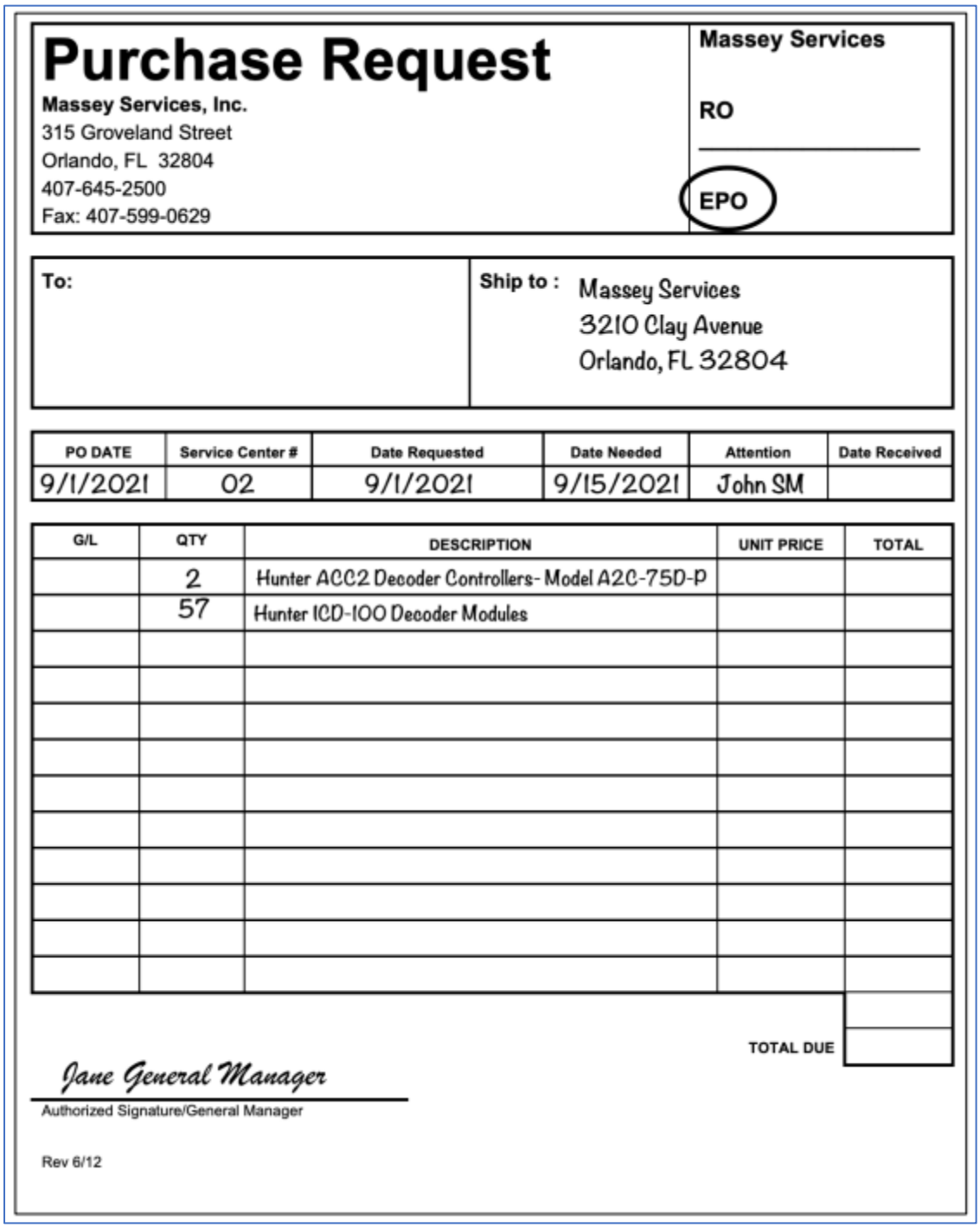
A service center may need to order materials and supplies (M&S) not available in Microsoft Dynamics 365 (D365). This requires the requisition process to be completed on paper outside of our Enterprise Resource Planning (ERP) system.

PROCEDURE

The procedure for filling out a Purchase Request form for M&S not in D365 is as follows:

1. RO/EPO box: Indicate if the order is a regular order (RO) or an emergency purchase order (EPO).
2. To: Enter the vendor's name. If you do not know, leave blank.
3. Ship To: Enter the service center delivery address. Do not use post office box addresses.
4. PO Date: Enter the date you are filling out the form.
5. Service Center: Enter the 3-digit service center number (include any leading zeroes).
6. Date Requested: Enter the date you originally requested the product(s). This is generally the same date you fill out the form.
7. Date Needed: When you need to have the product(s) arrive at the service center.
8. Attention: Print the name of the person receiving the order.
9. G/L: Enter the General Ledger code to be charged for this product.
10. Qty: Enter the quantity and unit of measure (UOM) required. For example, 1 case, 15 bags, or 3 boxes.
11. Description: Describe the product in detail, including container size, and product number or SKU if available.
12. Unit Price and Total Columns: Leave blank. The Purchasing department will fill in this information.
13. Authorized Signature: The EPO will not be processed without the general manager's signature.
14. Scan authorized EPO and forward to your purchasing agent.
15. The office manager will keep a copy of each document to be utilized when the product, packing slip, and invoice are received. (See Figure 1.)

Figure 1. Purchase Request form.



Purchase Request

Massey Services, Inc.
315 Groveland Street
Orlando, FL 32804
407-645-2500
Fax: 407-599-0629

Massey Services

RO _____

EPO

To:

Ship to : Massey Services
3210 Clay Avenue
Orlando, FL 32804

PO DATE	Service Center #	Date Requested	Date Needed	Attention	Date Received
9/1/2021	02	9/1/2021	9/15/2021	John SM	

G/L	QTY	DESCRIPTION	UNIT PRICE	TOTAL
	2	Hunter ACC2 Decoder Controllers- Model A2C-75D-P		
	57	Hunter ICD-100 Decoder Modules		

TOTAL DUE

Jane General Manager
Authorized Signature/General Manager

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