

HOW TO CREATE A PO FOR A CONTRIBUTION

New Item

Policy: Carson PO Payment Request P...

Type: Goods

Vendor: SUTHERLIN HIGH SCHOOL BASEI
EUGENE, OR 97402
jolona@carsonsteam.com

Expense Type: 8130-000 Contributions

Business Entity: 1 (010) WECCO

Site: 2 (0046) Sutherlin Admin

Name Category: (Charity Contribution) 05

Sub-Category: Branch

Detail: Local

Description: Baseball Jersey's

Item No: [Empty]

Quantity: 1

Unit Price: 500

Currency: USD-US, Dollar

Total: 500.00

Needed By: [Empty]

Unit Of Measure: Each

Notes To Supplier: [Empty]

Buttons: Save, Cancel

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8	Vendor	Charity Name
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13		
14	Expense Type	Contributions
15	Bus Entity	Company
16	Site	Branch/Division
17	Name Category	Charity Contribution
18	Sub-Category	Branch or Corporate
19	Detail	Type of Charity
20	Description	More detail
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1. In Concur, complete the fields above. Refer to the spreadsheet on right for what type of information to include in each section. Click Save.

NOTE: If the vendor isn't already in Concur, request a W-9 and send to Samantha Davis or Josh Olona in Accounting so they can be added.

2. Click the Request button at the bottom

PURCHASE DETAILS

Policy: Carson PO Payment Request Policy

Employee: OLONA, JOSH

Description:

Notes To Supplier:

Comment:

Business Entity:

Site:

Ship To Address

CECO, Inc.
3125 North West 35th Avenue
Portland, OR 97210 US

Make this location my default

Bill To Address

CECO, Inc.
PO BOX 6030
Portland, OR 97228 US

Not Submitted

PURCHASE REQUEST #2374

[Image Gallery](#) [Comments](#) [Audit Trail](#) [Approval Flow](#)

PURCHASE DETAILS

Policy: Carson PO Payment Request Policy
Employee: OLONA, JOSH
Description: Baseball Jersey
Notes To Supplier:

Ship To Address

CECO, Inc.
3125 North West 35th Avenue
Portland, OR 97210 US
Bill To Address

CECO, Inc.
PO BOX 6030
Portland, OR 97228 US
Back to Business System

REQUEST ITEMS

Show Distributions

Baseball Jersey's Quantity: 1 Each Total: \$500.00
Expense Type: 8130-000 Contributions Unit Price: 500

SUTHERLIN HIGH SCHOOL BASEBALL
No address
EUGENE, OR 97402

Business Entity: (010) WECO Site: (0046) Sutherlin Admin
Name Category: (Charity Contribution) 05 Sub-Category: Branch
Detail: Local

Show Comments

Account Code	Distribution Code	Percentage	Net Amount
8130-000	010-0046-Charity Contribution-Branch-Local [System Default]	100	\$500.00

Total: \$500.00

3. Add more details in the Description box.
 4. Click Save
 5. Click the Actions button to upload the backup documentation.
 6. Then click the submit button.
7. This will be sent to James Haselhofer and Matthew Benz for approval. Once approved, you will receive a PO number from Concur. To facilitate payment for cash donations, follow standard invoice submission process by emailing the invoice (or alternative*) to acctspay@carsonteam.com.

**You may not always have an invoice in donation/sponsorship situations. In that case, acceptable alternatives would be a request letter, or similar document, that outlines payment information, including how a check should be addressed and where it should be mailed to.*