

Purchase Orders for MEEOA & NEOA

For NEOA and MEEOA membership renewals and conference registrations, use the Check Request form in MSM. A check request can be submitted for each individual, or two or more people's payments can be lumped into one check. Procurement does **not** require invoices for check requests, which automates the process. Never attach the invoice!

When NEOA or MEEOA send mass emails for membership renewal or conference registration, each individual planning to renew or attend completes the online form, which generates an invoice. They forward their invoices to the person responsible for their purchasing.

Purchaser submits the check requests, using "Remittance Details" and "Handling Code" sections of the online form (instructions below) so checks are delivered to the purchaser, not directly to NEOA/MEEOA. Due to the volume of checks they receive from UMS constituents, they require that you print the invoice(s) to mail with the associated check(s).

Check Request Remittance Details and Handling Codes

On the Draft Requisition, locate "**Billing Options**", click the "**Edit**" button.

The screenshot shows the MarketPlace software interface. The top navigation bar includes 'home/shop', 'favorites', 'forms', 'carts', 'approvals', 'history/reports', 'vouchers/receipts', and 'more >>'. The main content area displays a requisition summary with tabs for 'General', 'Shipping', 'Billing', 'Accounting Codes', and 'Supplier Info'. The 'Billing' tab is active, showing the 'Billing Options' section. The 'Billing Options' section includes fields for 'Payment Terms Advice', 'Capital Asset', 'Depreciate', and 'Remittance Advice'. The 'Remittance Advice' field is circled in red, and a red arrow points to it. The 'Billing Options' section is also circled in red. The 'Handling Code' section is visible below, with a red arrow pointing to the 'Return Check' field.

This activates the "**Remittance Advice**" field. Enter information that will help the Supplier identify what the payment is for. Information will print on the payment remittance. (example below), Click **Save**.

The screenshot shows the 'Billing Options' dialog box. The 'Remittance Advice' field is circled in red, and a red arrow points to the 'Payment Terms Advice' field. The 'Remittance Advice' field contains the text 'Conf Reg for M Smith'. The 'Save' and 'Cancel' buttons are visible at the bottom.

Additional Options (noted **→** above) In "**Payment Terms Advice**" field type "Due Now".

*****To have the check delivered to you instead of to the supplier, use the Handling Code Section, click edit, then select "yes" from the dropdown menu and in the "Handling Code Advice" field enter your name. *****