

MyFloridaMarketPlace Requisitioning 101 Workshop



Agenda

- MyFloridaMarketPlace Overview
- Purchasing Overview
- Creating Requisitions
- Approving Requisitions
- Receiving Goods
- Creating Invoices
- Approving Services
- System Searches
- Vendor Performance Tracking (VPT)
- Resources

- **Prerequisite:** [System Overview Online Training](#)
- **Covered:**
 - Navigating MyFloridaMarketPlace (MFMP) applications
 - Dashboard setup
 - Password reset
 - Delegation of authority
 - Changing email notification preferences
 - System searches

Do you have any questions?

- MyFloridaMarketPlace (MFMP) is the State of Florida's eProcurement system and has been in operation since 2003
- The system is a source for centralized procurement activities; streamlining interactions between vendors and state government entities and providing tools to support innovative procurement for the State of Florida



MyFloridaMarketPlace provides:

- Centralized procurement data for state and agency departmental purchasing
- Web-based, paperless application with 24/7 access
- All applications have a similar look and feel
- Electronic quoting features
- Reduced error rates
- Faster order processing time
- Electronic, automated approval flows
- Storage of all content related to the transaction in one place

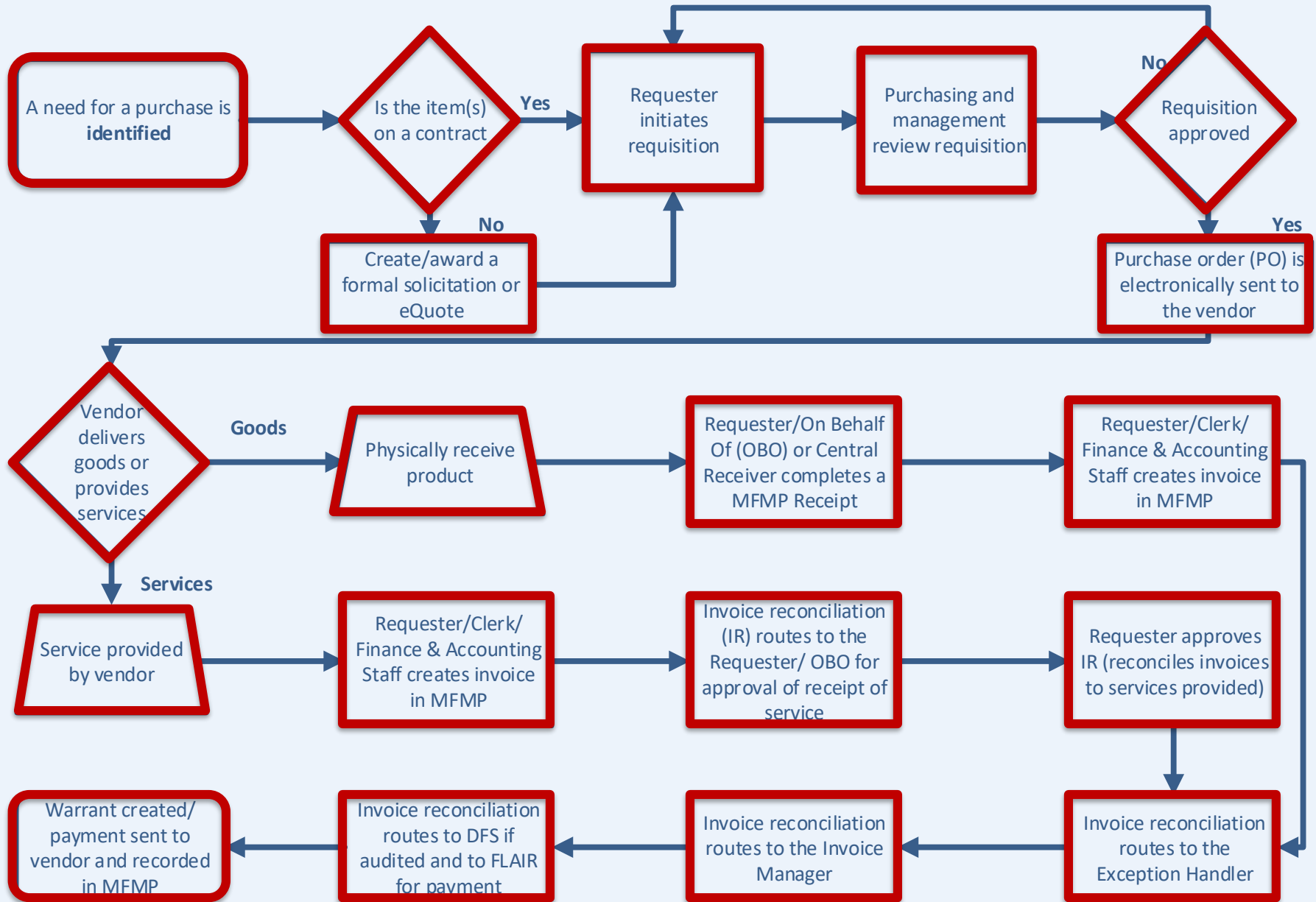
Upon completion of this training, you will be able to:

- Describe the MFMP procure-to-pay process
- Create a requisition, invoice, and receipt
- Recognize when to use an MFMP catalog and when to create a non-catalog item
- Identify the difference between receiving a commodity and approving a service
- Access Vendor Performance Tracking (VPT) surveys

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Procure-to-Pay Process



What is a Requisition?

A requisition (PR) is a request to purchase a commodity and/or service for the State of Florida. Once the requisition is approved, MFMP will generate a purchase order and transmit it to the vendor.

Things to know:

- A purchase order (PO) is a contract between the state and the vendor
- Set up a PO the same way the vendor will invoice it
- Use the unit price
- Include information to meet audit requirements
- Setting up your requisition properly may prevent:
 - Confusion for the vendor
 - Payment issues
 - Delayed receipt of products/services
 - Problems with change orders



What are the different prefixes?

- PR – Original purchase request
- A or B – Encumbered orders
- PO – Unencumbered orders
- RC – Auto-generated receipts
- INV – Invoices
- IR – Invoice Reconciliations

Things to know:

- Federal and state laws prohibit customers from including confidential information directly related to an individual within MFMP
- Examples of confidential information include :

Client/employee addresses	Email addresses
Client/patient names	Telephone numbers
Social Security numbers	Medical record numbers
Account numbers	Certificate/license numbers
Health plan beneficiary numbers	Dates (birth date, date of death, admissions date, etc.)

For more information on confidential information, view the [MFMP Buyer Manual](#).

What are State Term Contracts?

State Term Contracts (STC) are formal agreements that were competitively procured by the Department of Management Services (DMS), Division of State Purchasing. These contracts between the state and a specific set of vendors, permit state agencies to purchase specific goods and/or services, at a predetermined price or discount, for a defined period. Agency customers are required to utilize STCs, in accordance with section 287.056, Florida Statutes.

What are Alternate Contracts Sources?

Alternate Contract Sources (ACS) are federal, state, or local government contracts that have been determined by DMS to be cost effective and in the best interest of the state.

Things to know:

- A Method of Procurement (MOP) indicates the statutory authority an agency customer must have to make a purchase
- Florida provides several different procurement methods to state agencies to purchase commodities and services
- Agencies must follow procurement rules when determining which procurement method they will need to use

Commonly used MOPs:

- State Term Contracts (MOP A or B)
- Alternate Contract Sources (MOP C)
- PRIDE (MOP N)
- RESPECT (MOP M)
- Discretionary Spend (MOP E)
- Purchases under Category II threshold that require informal quotes (MOP F)

To see a full list of MOPs, view the [MFMP Buyer Manual](#).

Things to know:

- Florida uses the [United Nations Standard Products and Services Codes \(UNSPSC\)](#) for commodity and service classification for state purchases
- UNSPSC codes are eight-digits long, with a four-level hierarchy:
 - * Segment – 00XXXXXX
 - Family – 0000XXXX
 - Class – 000000XX
 - + Commodity - 00000000

Hierarchy	Code	Description
Segment	47000000	Cleaning Equipment and Supplies
Family	47120000	Janitorial equipment
Class	47121700	Waste containers and accessories
Commodity	47121701	Trash bags

Things to know:

- Florida uses a six-digit code that represents a uniform classification of expenditures for use by all state agencies in the Florida Accounting Information Resource (FLAIR)
- MyFloridaMarketPlace populates an object code based on the commodity code selected

Commodity Code	Object Code
80161801: Photocopier Rental or Leasing Service	442000: Equipment Rental – Copier
14111511: Writing Paper	341018: Supplies Office Consumable
27152500: Tires and Tire Tubes	241038: Repairs/Maintenance – Commodities Vehicles

What is an Encumbrance?

An encumbrance is a portion of a budget set aside in a state's accounting system for spending, with the goal of reducing budgetary overages.

In Florida, once an encumbered requisition is fully approved in MFMP, the encumbrance is created in FLAIR, the state's accounting system, and funds are removed from the agency's budget and placed aside for that specific transaction. When an invoice is paid against an order, the associated encumbrance is reduced by the amount of the payment.

Things to know:

- The *Encumber Funds* box defaults based on the preferences of the customer's agency
- When an invoice is processed through MFMP, all or part of the encumbrance is released in FLAIR
- The MFMP order number and the FLAIR encumbrance number are the same

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Requester



- Creates requisitions
- Creates change orders
- Completes receipts (most agencies)
- Creates invoices (most agencies)
- First approver for service-based invoices
 - Validates that the services listed on the invoice were performed

Catalogs vs Non-Catalog Purchases

Catalog

- Purchases created from MFMP catalogs that are auto-populated with state term contract information
 - All catalogs are based on STC/ACS contracts
- MFMP offers customers two types of catalogs:
 - Line item
 - Punchout

VS

Non-Catalog

- Purchases created when items are not listed on an MFMP catalog
- Agency customers will need to manually enter the purchase information

Punchout Catalogs

Are used to locate line items through a vendor's online catalog; customers "punchout" from MFMP to the vendor's website.

Examples:

Office Depot
PRIDE Enterprises

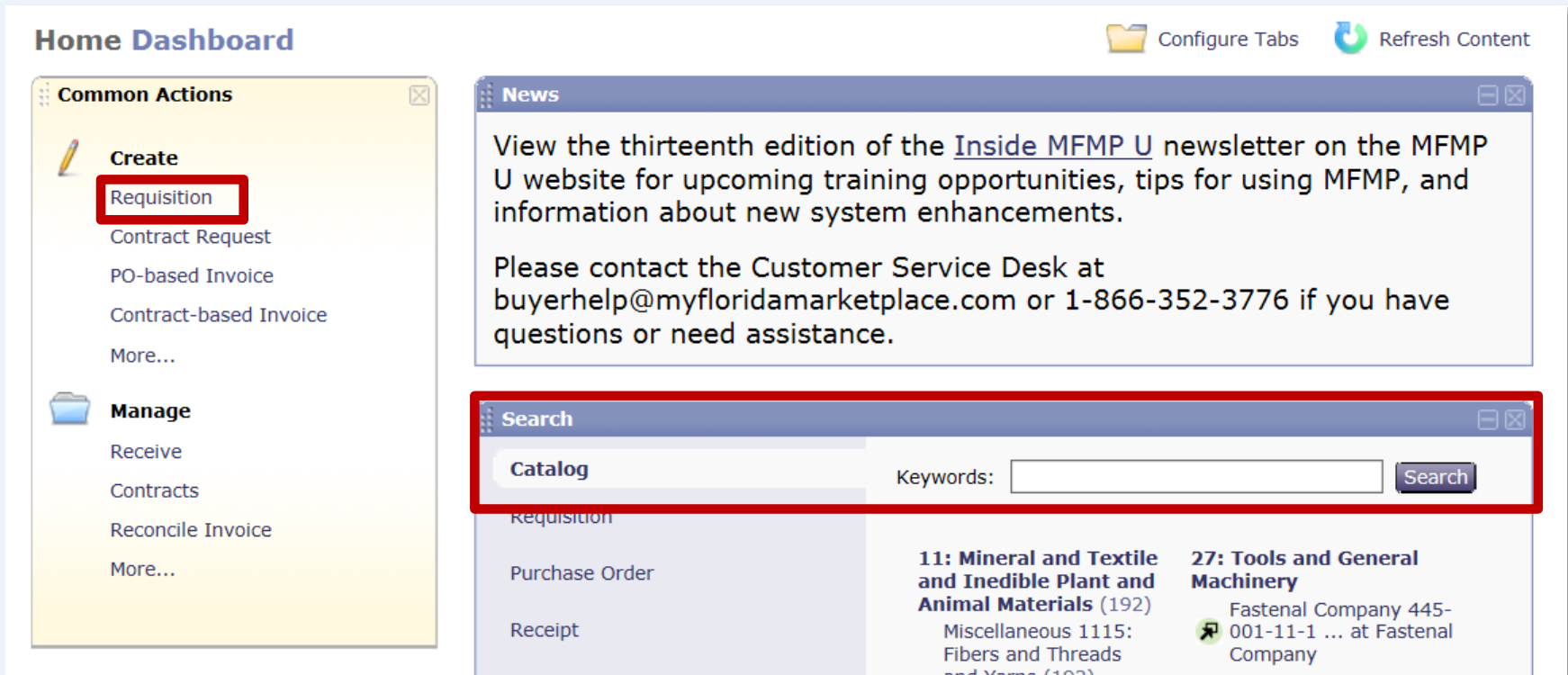
Line Item Catalogs

Are catalogs of preloaded line items with the supplier's location, vendor name, commodity code, unit price and part number.

Examples:

Pitney Bowes
Verizon Wireless

- Search for an MFMP catalog by either:
 - Searching the catalogs in the **Search** portlet
 - Clicking *Requisition* under **Create** in the **Common Actions** section




The screenshot displays the Home Dashboard interface. In the top right corner, there are links for 'Configure Tabs' and 'Refresh Content'. On the left side, the 'Common Actions' portlet is visible, with the 'Create' section expanded and 'Requisition' highlighted with a red box. Below 'Create', there are options for 'Contract Request', 'PO-based Invoice', 'Contract-based Invoice', and 'More...'. The 'Manage' section includes 'Receive', 'Contracts', 'Reconcile Invoice', and 'More...'. The main content area features a 'News' portlet with a message about the 'Inside MFMP U' newsletter and contact information for the Customer Service Desk. Below the news, the 'Search' portlet is highlighted with a red box, showing a 'Catalog' dropdown menu and a search input field with a 'Search' button. The search results display a list of catalogs, including '11: Mineral and Textile and Inedible Plant and Animal Materials (192)' and '27: Tools and General Machinery'.

Fields that auto-populate are:

- Vendor information
- Commodity Code
- Method of Procurement
- Item description
- Item unit price
- Supplier part number
- State Term Contract number

- Refine the MFMP catalog search by:
 - Applying search filters
 - Using keywords

Contract

- Recent Choices - 


Supplier


American Body Armor (1186)
 Gulf States ... (74)
 Northgate Limited, ... (2)
 PRIDE Enterprises (1)
 Qualpath, Inc. (203)
 Show All ...


Language

English (16360)


Favorites

- Recent Choices - 

PR10181829:  **Items:0 Total: \$0.00000 USD** [Checkout](#) [Exit](#)

Add items to your requisition from the catalog, and optionally select catalog items you've identified as your ... 










Catalog Home

Catalog  [Options](#)

Contract ID:

Browse By: [Categories](#) | [Suppliers](#)

[Create Non-Catalog Item](#)

<p> <u>11: Mineral and Textile and Inedible Plant and Animal Materials</u> (192) Miscellaneous 1115: Fibers and Threads and Yarns (192)</p> <p> <u>14: Paper Materials and Products</u> (2) 1411: Paper Products (2)</p> <p> <u>23: Industrial Manufacturing and Processing Machinery and Accessories</u> (34) 232416: Metal Cutting Tools (34)</p> <p> <u>26: Power Generation and Distribution Machinery and Accessories</u> (3) 261117: Batteries and Cells and Accessories (3)</p> <p> <u>27: Tools and General Machinery</u> Fastenal Company 445-001-11-1 ... at</p>	<p> <u>46: Defense and Law Enforcement and Security and Safety Equipment and Supplies</u> (6793) 4610: Light Weapons and Ammunition (2846) 461115: Bombs and Grenades (12) 4615: Law Enforcement (2300) More ...</p> <p> <u>47: Cleaning Equipment and Supplies</u> (729) 471216: Floor Machines and Accessories (706) 471318: Cleaning and Disinfecting Solutions (23)</p> <p> <u>49: Sports and Recreational Equipment and Supplies and Accessories</u> (3) 491316: Hunting Products (3)</p> <p> <u>52: Domestic Appliances and</u></p>
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Click the *Thumbnails* link to view multiple line item catalog products at once.

Refine your results

Contract

- Recent Choices -

Keyword

carrier (124)
armor (115)
iiaa (103)
tactical (52)
concealed (30)

Show All ...

Price

\$10.00000 - ... (30)
\$100.00000 - \$1,000 ... (106)
\$1,000.00000 - ... (56)

Favorites

- Recent Choices -

PR10181829: 🛒 **Items:0 Total: \$0.00000 USD** [Checkout](#) [Exit](#)

Add items to your requisition from the catalog, and optionally select catalog items you've identified as your favorites. You can also enter details for non-catalog items.

Catalog Home

11: Mineral and Textile and ... [Search](#) [Options](#) [Create Non-Catalog Item](#)

Contract ID:

Your search path: [All Categories](#) > 11: Mineral and Textile and Inedible Plant and Animal Materials

192 items found Show: 20|50|100 results per page Sort By: [Relevance](#) | [Price](#) | [Best selling](#) | [Name](#) View: [Details](#) | **Thumbnails**

[Add to Cart](#) [Compare](#) [Add to Favorites](#) Page 1

<input type="checkbox"/> 10x12 F7 Female Rigid Plate \$150.75000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites	<input type="checkbox"/> 10x12 L7 Semi Rigid Plate \$150.75000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites	<input type="checkbox"/> 5x8 F7 Female Rigid Plate \$74.25000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites
<input type="checkbox"/> 5x8 L7 Semi Rigid Plate \$74.25000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites	<input type="checkbox"/> 5x8 Steel Plate \$36.00000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites	<input type="checkbox"/> 5x8 Soft Trauma Pac \$51.75000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites

- Compare line item catalog products to determine the best value
- Select the items to consider and click *Compare*

Refine your results

Contract

- Recent Choices -

Keyword

carrier (124)
armor (115)
iia (103)
tactical (52)
concealed (30)

Show All ...

Price

\$10.00000 - ... (30)
\$100.00000 - \$1,000 ... (106)
\$1,000.00000 - ... (56)

Favorites

- Recent Choices -

PR10181829: 🛒 **Items:0 Total: \$0.00000 USD** **Checkout** **Exit**

Add items to your requisition from the catalog, and optionally select catalog items you've identified as your favorites. You can also enter details for non-catalog items.

Catalog Home

11: Mineral and Textile and ... **Search** [Options](#) **Create Non-Catalog Item**

Contract ID:

Your search path: [All Categories](#) > 11: Mineral and Textile and Inedible Plant and Animal Materials




192 items found Show: 20|50|100 results per page Sort By: **Relevance** | Price | Best selling | Name View: [Details](#) | [Thumbnails](#)

Add to Cart **Compare** Add to Favorites Page 1

<input type="checkbox"/> 10x12 F7 Female Rigid Plate \$150.75000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites <input style="font-size: 0.8em; border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/>	<input type="checkbox"/> 10x12 L7 Semi Rigid Plate \$150.75000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites <input style="font-size: 0.8em; border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/>	<input type="checkbox"/> 5x8 F7 Female Rigid Plate \$74.25000 USD Qty: <input type="text" value="1"/> Add to Cart Add to Favorites <input style="font-size: 0.8em; border: 1px solid #ccc; padding: 2px 5px;" type="button" value="?"/>
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Compare Line Item Catalog items

- You can compare additional details for multiple items at a time
- When you make your selection, update the quantity and click *Add to Cart*

Compare Items Done			
	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>	Qty: <input type="text" value="1"/> <input type="button" value="Add to Cart"/>
Item Image			
Price	\$150.75000 USD	\$150.75000 USD	\$74.25000 USD
Product Description	10x12 F7 Female Rigid Plate	10x12 L7 Semi Rigid Plate	5x8 F7 Female Rigid Plate
Supplier	Survival Armor, Inc	Survival Armor, Inc	Survival Armor, Inc
Supplier Part #	10x12 F7 Plate	10x12 L7 Plate	5x8 F7 Plate
Manufacturer	Survival Armor Inc	Survival Armor Inc	Survival Armor Inc
Manufacturer Part #	10x12F7	10x12L7	5x8F7
Available in	30 Day(s)	30 Day(s)	30 Day(s)
Contract ID	46151504-NASPO-17-ACS	46151504-NASPO-17-ACS	46151504-NASPO-17-ACS
More Info on Supplier's Website:	http://www.survivalarmor.com	http://www.survivalarmor.com	http://www.survivalarmor.com
More Info on Manufacturer's Website:	http://www.survivalarmor.com	http://www.survivalarmor.com	http://www.survivalarmor.com
View Contract			
Recycle			
MyGreenFlorida			
MyGreenFlorida Certification			
Commodity Code			

What should the Requester do?

Your Purchasing Director asked you to order a specific part for the printer. You don't know if this item is on a State Term Contract. What should you do first?



A: Search the State Contracts and Agreements home page for an STC/ACS that fits the criteria.

B: Search the MFMP line item or punchout catalogs.

C: If the item is not available in either place, then create a non-catalog requisition.

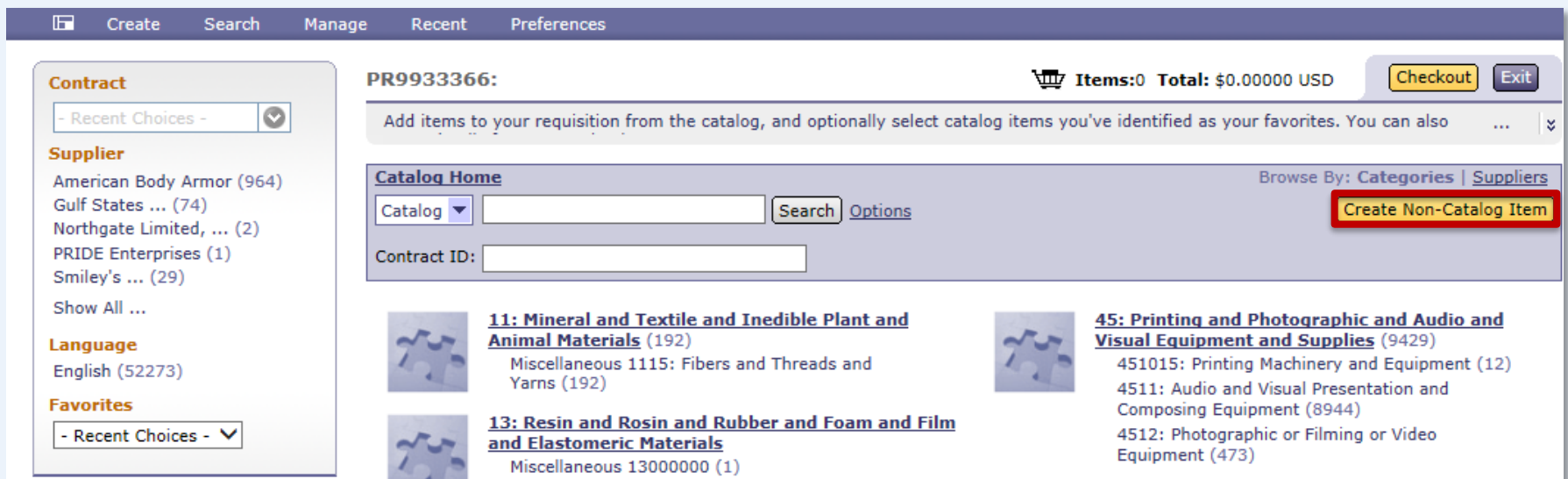
Demo and Practical Exercise

I will now demonstrate how to create a catalog requisition in the MFMP Buyer Training Environment.

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3. **Creating Requisitions**
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Follow along by completing Exercise 1 of the Requisitioning 101 Practical Exercise

- Non-catalog requisitions are created if an item is:
 - Not on a MFMP catalog
 - On an STC that requires a Request for Quote (RFQ)
 - Not available on a STC
- Create non-catalog requisitions by clicking the *Create Non-Catalog Item* button and manually entering the information



The screenshot shows the MFMP requisition creation interface. At the top, there is a navigation bar with tabs for 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. Below this, the contract number 'PR9933366:' is displayed, along with a shopping cart icon showing 'Items:0' and a total of '\$0.00000 USD'. There are 'Checkout' and 'Exit' buttons. A message prompts the user to 'Add items to your requisition from the catalog, and optionally select catalog items you've identified as your favorites. You can also ...'. Below this is a 'Catalog Home' section with a search bar and a 'Create Non-Catalog Item' button highlighted in red. The main content area displays a grid of catalog items, including '11: Mineral and Textile and Inedible Plant and Animal Materials (192)', '13: Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials', '45: Printing and Photographic and Audio and Visual Equipment and Supplies (9429)', and '451015: Printing Machinery and Equipment (12)'. On the left side, there are sections for 'Contract', 'Supplier', 'Language', and 'Favorites'.

Creating a Non-Catalog Line Item

Tax Or Other Charge:

Full Description: *

Commodity Code: *

Supplier: (No Preference)

Vendor Location:

Supplier Part Number:

Method of Procurement: *

State Contract ID:

Supplier Auxiliary Part ID:

Quantity:

Unit of Measure:

Price: * USD

Amount: \$0.00000 USD

- Add a *Full Description*
- Select a *Commodity Code*
- Select a *Vendor Location*
- Select a *Method of Procurement*
- Add a *Quantity*
- Update the *Unit of Measure* (if applicable)
- Add a *Price*
- Click *Update Total*
- Click *OK*

Summary | Approval Flow

Title: * Janitorial Services

On Behalf Of: Tammy Clark

Delay Purchase Until: [] []

PO Start Date: [] []

PO End Date:

Fiscal Year:

PUI:

Encumber Funds:

Requester OLO:

Requester Site Code:

P Card Order:

Do Not Send Purchase Order To Vendor?

Link to MFMP Sourcing:

Reset MFMP eQuote Event:

My Labels: [] [Apply Label...](#)

Line Items (1)

<input checked="" type="checkbox"/>	No.	Type	Description
<input checked="" type="checkbox"/>	1	[]	Kitchen and Break Ro

[Edit] [Copy] [Delete] | [Add from ...] [Add from ...]

Total Cost: \$12,000.00000 USD
[Update Total]

- Add a *Title*
- Check the line item's header box to mass edit all lines at once (check each line to edit individual lines)
- Click the *Edit* button in the **Line Item** section
- In the **Accounting – By Line Item** section review and update:
 - Organization code (Org code)
 - Expansion option (EO)
 - Object code

Things to know:

- The **Summary** tab is the same for catalog and non-catalog requisitions
- Requesters can select whether or not comments and attachments are visible to the vendor
- Attachments have to be added one file at a time
- Requesters are required to check a box, certifying that attachments do not contain confidential information

Correct Line Item Setup

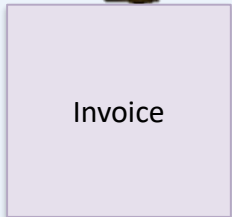
Customer creates a purchase order for **2,080hr@\$75/hr=\$156,000**

Vendor creates an invoice for 1 month of service **(160hr@\$75/hr) = \$12,000**

Amount remaining on purchase order is **(1,920hr@\$75/hr) = \$144,000**

PO is sent to Vendor

Staff Augmentation Purchase Example



2080hr / \$75

Invoice is sent to customer



Incorrect Line Item Setup

Customer creates a Purchase Order for **1yr@\$156,000**

Vendor creates an invoice for 1 month of service **160hr@\$75 = \$12,000**

Units of Measure do not match

PO is sent to Vendor



PO
1yr@
\$156,000

Invoice



Invoice is sent to customer



Demo and Practical Exercise

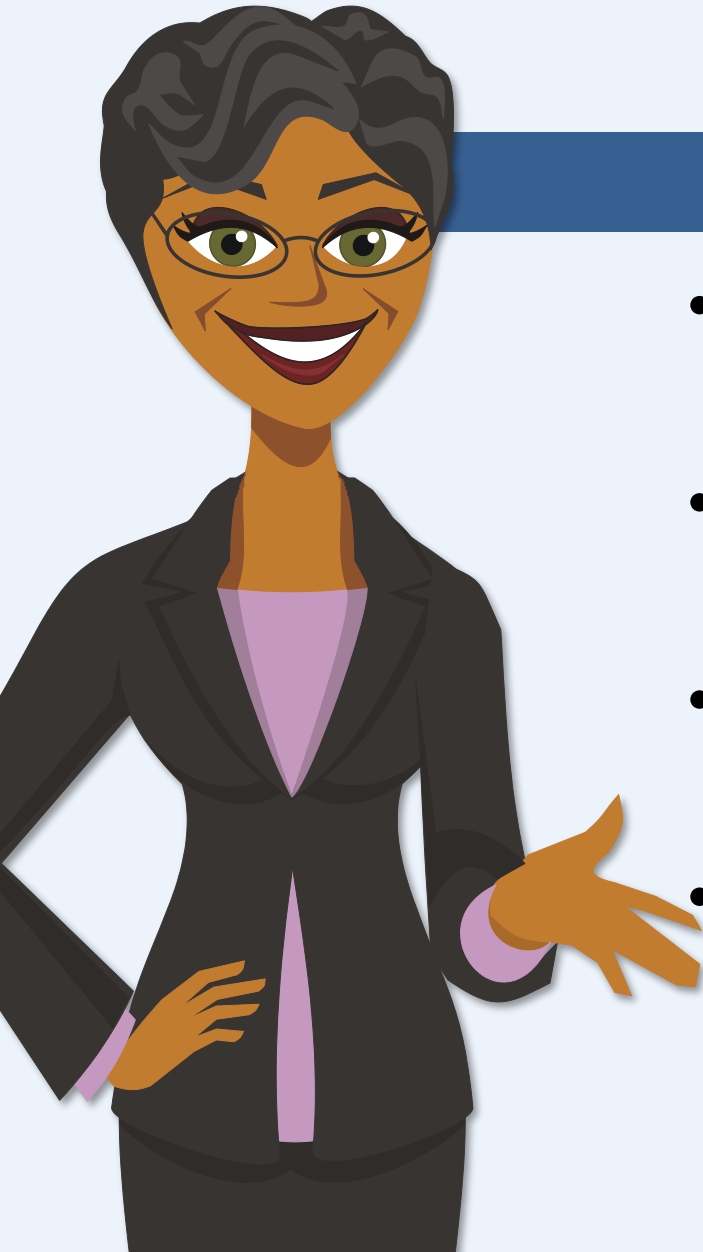
I will now demonstrate how to create a non-catalog requisition in the MFMP Buyer Training Environment.

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Follow along by completing Exercise 2 of the Requisitioning 101 Practical Exercise

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Requisition Approver

- Reviews to confirm that requisitions are appropriate
- Edits and makes changes to requisitions
- Approves/denies requisitions for management or budgetary purposes
- Validates that purchases adhere to purchasing rules and regulations

Things to know:

- Review that the request is necessary and appropriate. Review should include:
 - Justification
 - Commodity Code and Object Code
 - Method of Procurement
 - State Term Contract number
 - Attachments and comments
- After reviewing the requisition, approvers can approve, edit or deny the requisition
- MyFloridaMarketPlace sends denied requests back to the Requester
 - Approvers should include a comment about why the request was denied

I will now demonstrate how to approve a requisition in the MFMP Buyer Training Environment.

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To acknowledge acceptance of goods and/or services in MFMP, agencies must complete receipts for delivered goods and approve services rendered within five working days, in accordance with section 215.422, Florida Statutes.

Receiving Goods

MyFloridaMarketPlace offers two types of receiving: desktop receiving and central receiving.

Desktop	Central
The Requester or On Behalf Of (OBO) completes the receipt of goods	Customers with the 'Central Receiving' role can complete the receipt of goods

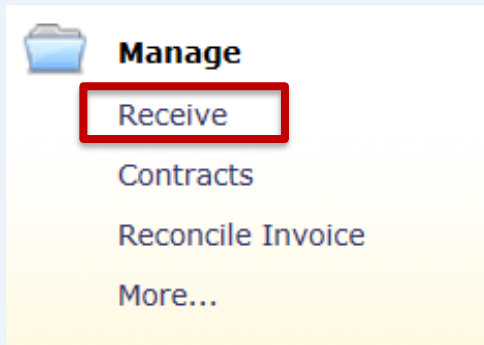
Approving Services

MyFloridaMarketPlace routes invoices for services to the Requester or OBO for approval to confirm receipt of services prior to the invoice reconciliation (IR) being routed to Finance & Accounting.

Things to know:

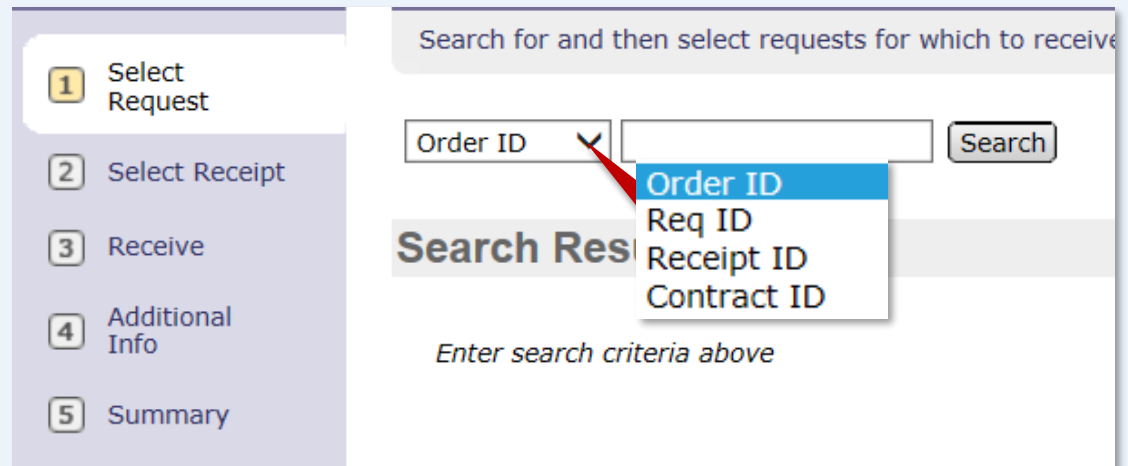
- MyFloridaMarketPlace places a blank receipt in 'Composing' status when an order is approved
- Partially receiving a purchase causes the order to remain open until the Requester or Central Receiver:
 - Receives the order in full
 - Selects the *Close Order* radio button
- When a partial receipt is completed, a new receipt is placed in 'Composing' status
- When a receipt is completed, the order reflects a status of 'Receiving' or 'Received' in the system

- Initiate a receipt by:
 - Selecting *Receive* under **Manage** on the Dashboard or
 - Clicking the *Receive* button on the requisition





- On the **Receiving Steps** page, search for the order by using the:


- Order ID
- Requisition ID
- Receipt ID
- Contract ID




- In the **Line Items – Quantity Receiving Needed** section:
 - Enter the number of items received
 - Enter the number of items rejected, if applicable
 - Enter the date the items were received
- If the order needs to remain open, keep the default selection *No* for the *Close Order* radio button

Order ID: [MA56952-R152](#) Date: Today, 11:31 AM
 Order Title: State Purchasing - Staples Processing Status: Receiving
 My Labels:  [Apply Label...](#)

Line Items - Quantity Receiving Needed 

No.	Quantity	Description	Prev. Accepted ↓	Accepted	Rejected	Date Received
1	1	Duracell Coppertop AAA Alkaline Batteries, 20/Pk	0	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="Today, 11:31 AM"/> 

Close Order:  Yes No

What should the Requester do?

What is the common reason(s) why a Requester cannot complete a receipt?
(select all that apply)



A: The purchase order has a service-based commodity code.

B: The receipt needs to be completed by a customer within Central Receiving.

C: The requisition was not approved.

I will now demonstrate how to receive goods in the MFMP Buyer Training Environment.

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What is an invoice?

A document, written or electronic, delivered to the agency's *Bill To* address indicated on the purchase order that itemizes the goods and/or services the vendor provided, any associated costs and the total costs.

Things to know:

- There are three types of invoices in MFMP:
 - PO-based
 - Contract-based
 - Electronic (eInvoices)
- Requesters, clerks and Finance and Accounting staff are responsible for creating an invoice
- Agency customers should create the invoice in MFMP when they receive it from the vendor
- Creating the invoice in MFMP begins the review and/or payment process by generating an invoice reconciliation

Things to know:

- Each MFMP invoice must match the paper invoice the vendor sent
- The Department of Financial Services (DFS) requires customers to attach a copy of a paper or emailed invoice
 - Invoice attachments are not required for eInvoices
- For service-based invoices, DFS requires:
 - Service start and end dates
 - Attached timesheet

In the **Common Actions** queue, under **Create**, click *PO-based Invoice*.

Home Dashboard Configure Tabs Refresh Content

Common Actions

Create

- PO-based Invoice**
- Contract-based Invoice
- Contract Request
- Cancel Requisition
- More...

Manage

- Receive
- Reconcile Invoice
- Contracts
- More...

News

Watch [this short video](#) for some tips on how to search MFMP Catalogs.

Please contact the Customer Service Desk at buyerhelp@myfloridamarketplace.com or 1-866-352-3776 if you have questions or need assistance.

To Do

ID ↓	Date	From	Status	Title	Required Action
IRT154545-4623134	8/3/2017	Debbie Burch	Reconciling	IRT154545-4623134	Reconcile

[View List ...](#) (1)

My Documents

ID	Title	Date ↓	Status
PR10181845	test test eQuote	7/28/2017	Submitted
PR10181844	Test of integrated IT Staff eQuote template	7/28/2017	Composing
PR10181843	Test eQuote I3for New IT Staff Aug Template	7/28/2017	Composing
PR10181842	Test eQuote II for New IT Staff Aug Template	7/28/2017	Composing
PR10181837	Test Integrated eQuote with IT Template	7/28/2017	Composing
PR10181825		7/25/2017	Composing
PR10181821		7/24/2017	Composing

[View More ...](#) (821)

Recently Viewed

- PR10181844 T...ote template
- PR10181843 T... Aug Template
- IR1616-2-461...616-2-4611511
- PR10175104 D...fice Supplies

- To create an invoice, complete the following fields:
 - Supplier Invoice Number and Date
 - Vendor Location
 - Purchase Order
 - Invoice Received Date
 - Service Start and End Dates

INV4623135: INV4623135

Items:0 Total: \$0.00000 USD

Next ▶ Exit

Direct Invoicing

- 1 Create Header
- 2 Add Items
- 3 Summary

On Behalf Of: MFMP Support

Supplier Invoice #: *

Supplier Invoice Date: *

Supplier: *(no value)


Vendor Location: *(no value) [select]

Purchase Order: *(no value) [select]

Invoice Received Date: *

Service Start Date: *

Service End Date: *

My Labels:  [Apply Label...](#)

- On the **Add Items** page, MFMP generates invoice line items where customers can:
 - Edit, copy or delete the line item(s)
 - Add taxes and supplementary charges

INV4623136: Copy of INV2017ci-269-4612159

Items:1 Total: \$2,790.00000 USD Add More Items Summary

This is a summary of the item(s) you have added.

Line Items Show Details


<input type="checkbox"/>	No.	Description	Order	Qty	Unit *	Price *	Amount	
<input type="checkbox"/>	1	Color advertisements in Florida Trend's ...	B154CA	<input type="text" value="1"/>	each	\$2,790.000 USD	\$2,790.00000 USD	Add Taxes & Charges
Edit Copy Delete Update Total								


Subtotal: \$2,790.00000 USD
 Total Tax: \$0.00000 USD
 Total: \$2,790.00000 USD

- On the invoice **Summary** page, customers should:
 - Review the invoice header information and line item(s)
 - Add any applicable comments or required attachments

TITLE - INVOICE

Buyer Contact:	Tammy Clark	Order:	ADF698
ID:	INVT456132-4623139	Supplier:	Konica Minolta Business Solutions U.S.A., Inc.(F131921089)
Supplier Invoice #:	TT456132	Vendor Location:	Konica Minolta Business Solutions U.S.A., Inc.(098_Konica Minolta, 06-1 and 11-1)
Supplier Invoice Date:	Tue, 1 Aug, 2017	Invoice Received Date:	Tue, 8 Aug, 2017
		Service Start Date:	
		Service End Date:	

My Labels:  [Apply Label...](#)

Line Items [Show Details](#) 

<input type="checkbox"/>	No.	Description	Order	Qty	Unit *	Price *
<input type="checkbox"/>	1	State Purchasing FY 15-16 - Konica Minolta ...	ADF698	1	each	\$97.73000 USD \$97.73

[Edit](#) [Copy](#) [Delete](#) [Update Total](#)

COMMENTS - ENTIRE INVOICE

[Add Comment](#)

ATTACHMENTS - ENTIRE INVOICE

[Add Attachment](#)

[Prev](#) [Submit](#) [Exit](#)

I will now demonstrate how to create an invoice in the MFMP Buyer Training Environment.

1. MFMP Overview
2. Purchasing Overview
3. Creating Requisitions
4. Approving Requisitions
5. Receiving Goods
6. **Creating an Invoice**
7. Approving Services
8. System Searches
9. Vendor Performance Tracking
10. Resources

Agenda

- MyFloridaMarketPlace Overview
- Purchasing Overview
- Creating Requisitions
- Approving Requisitions
- Receiving Goods
- Creating Invoices
- Approving Services
- System Searches
- Vendor Performance Tracking (VPT)
- Resources

Things to know:

- Requesters must approve the IR to indicate that services have been rendered
 - This applies to all requisitions that contain a service-based commodity code (begins with 70-94)
- When approving services, Contract Managers must comply to all DFS rules, which include attaching one of the following:
 - FACTS Contact Summary Form
 - Contract Manager Statement

For more information, see the [DFS CFO Memorandum 2012-2013 01](#).

- Click the *IR link* from the **To Do** queue or click on the link in the email notification
- Click *Open*
- Review the IR details
- Enter applicable comments
- Upload required attachments
- Click *Submit* to approve the IR

Exceptions

[Approval Flow](#)
[Invoice](#)
[Order](#)
[Receipts](#)

Display: All line items ▼

Invoice Date: Tue, 30 Sep, 2014 Order:

Transaction Date: Wed, 1 Oct, 2014 Supplier:

Invoice: [INVSI268387-3324984](#) Contact:

Payment Completed in FLAIR: On Behalf Of

Audit in Progress? Reason Code

Returned by DFS: Site Code:

My Labels: i [Apply Label...](#)

Line Items

<input type="checkbox"/>	No. ↑	Qty	Description	Price
<input type="checkbox"/>	1	1	Annual renewal of Symantec software and ...	\$2,767.37000 USD
Matched To: Item 1 Part #: Not Available Unit of Measure: lot				

L

I will now demonstrate how to approve a service in the MFMP Buyer Training Environment.

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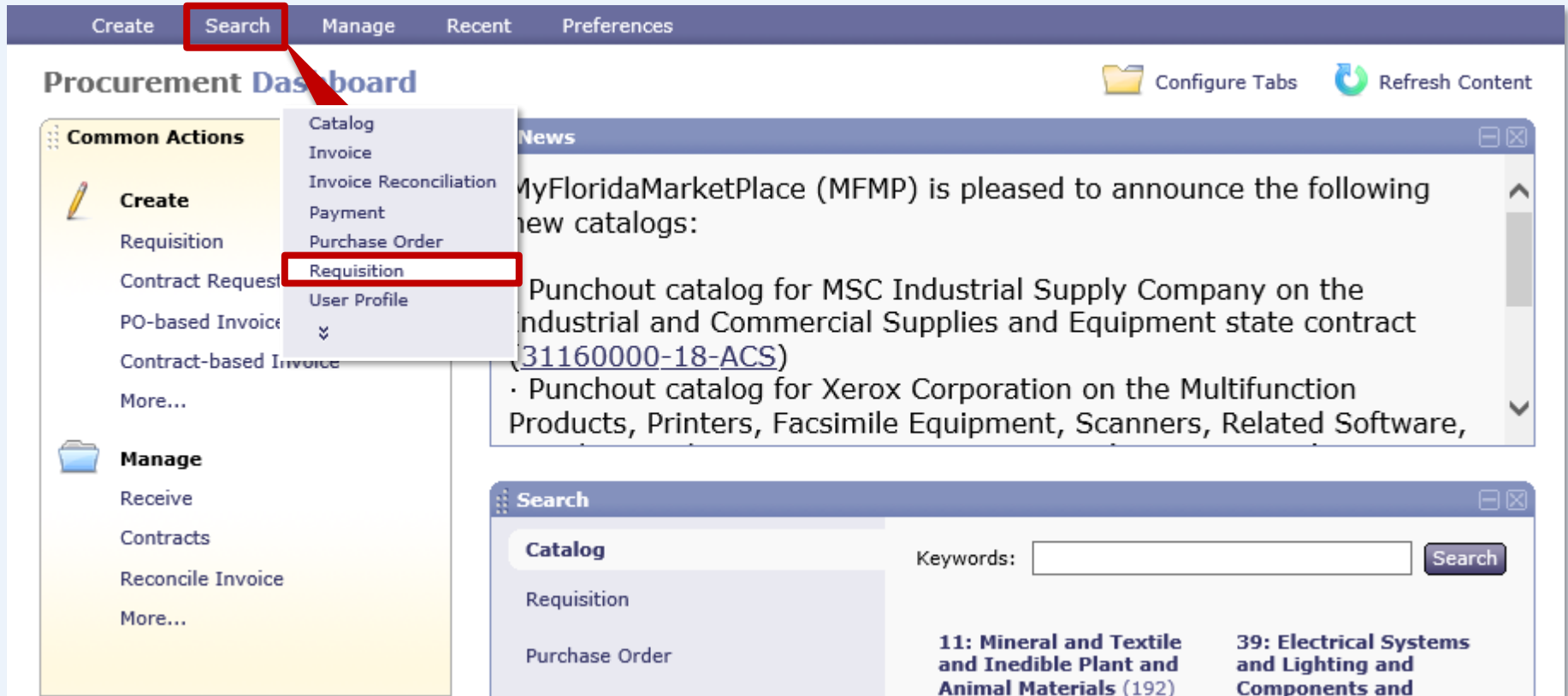
Agenda

- MyFloridaMarketPlace Overview
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Things to know:

- Any MFMP customer can conduct a system search within MFMP Buyer
- To see enterprise-wide transactions, customers will need the 'Query' group
- MyFloridaMarketPlace recommends that customers use a minimum of three search filters such as, Date Created, Purchasing Unit Identifier (PUI) and Requester
- Customers can save system searches that they frequently use
- Customers can export search results to Microsoft Excel

To conduct a system search, click *Search* and select the applicable transaction.



The screenshot displays the Procurement Dashboard interface. At the top, a navigation bar includes 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Search' button is highlighted with a red box, and a red arrow points to a dropdown menu. This menu lists several transaction types: 'Catalog', 'Invoice', 'Invoice Reconciliation', 'Payment', 'Purchase Order', 'Requisition' (highlighted with a red box), and 'User Profile'. Below the navigation bar, the dashboard is divided into sections. On the left, there are 'Common Actions' for 'Create' (Requisition, Contract Request, PO-based Invoice, Contract-based Invoice) and 'Manage' (Receive, Contracts, Reconcile Invoice). On the right, there is a 'News' section with an announcement about new catalogs from MyFloridaMarketPlace (MFMP), including one for MSC Industrial Supply Company and another for Xerox Corporation. At the bottom right, a 'Search' panel is visible, showing a 'Catalog' search filter selected, a 'Keywords' input field, and a 'Search' button. Below the search panel, there are two columns of results: '11: Mineral and Textile and Inedible Plant and Animal Materials (192)' and '39: Electrical Systems and Lighting and Components and'.

Select a transaction type

Type:

Fill in the applicable search filters

Change the search criteria and then click **Search**. Click the expand button on the right to s

Search Filters

[Search Options](#)

ID:

Date Created: From: Sun, 1 Jan, 2017 To: Sun, 31 Dec, 2017

Date Ordered:

Date Received:

Date Submitted:

Order ID (any line item):

Price (any line item): To: [USD](#)






PUI of Requester: (select a value) [[select](#)]

Requester: [Tammy Clark](#) [[select](#)]

Status:

Search Results

Found 54 items

<input type="checkbox"/>	Type	ID	Title	Status	Date Created	Total ↑
<input type="checkbox"/>		PR10195603		Composing	Mon, 24 Jul, 2017	\$0.00000 USD
<input type="checkbox"/>		PR10288316	DMS - State Purchasing - FY17/18 - Office Depot - Office Supplies	Received	Tue, 17 Oct, 2017	\$8.10000 USD
<input type="checkbox"/>		PR10031315	DMS-State Purchasing - FY16/17 - Office Depot - Office Supplies	Received	Mon, 20 Mar, 2017	\$13.78000 USD
<input type="checkbox"/>		PR10007440	DMS-State Purchasing - FY16/17 - Office Depot - Office Supplies	Received	Wed, 1 Mar, 2017	\$13.78000 USD
<input type="checkbox"/>		PR10234319	DMS - State Purchasing - FY17/18 - PRIDE - Replacement Key	Received	Thu, 24 Aug, 2017	\$16.00000 USD

View the search results

|

Demo and Practical Exercise

I will now demonstrate how to conduct a system search in the MFMP Buyer Training Environment.

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Follow along by completing Exercise 3 of the Requisitioning 101 Practical Exercise

Agenda

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Things to know:

- Vendor Performance Tracking (VPT) is a survey that customers complete to track vendor performance per transaction
- MyFloridaMarketPlace generates a VPT survey after an IR moves to 'Paid' status
- Surveys will generate for the following transactions:
 - State Term Contracts (STC)
 - Agency Term Contracts
 - Transactions greater than or equal to \$2,500 (including governmental entities)

Subject: Rate the Vendor

You are designated as the requester or MFMP Contract contact on one or more recently completed MyFloridaMarketPlace transactions.

To access a Vendor Performance Rating (VPT) you can take the following steps:

- * Login to Ariba Buyer at <https://buyer.myfloridamarketplace.com/Buyer/Main>
- * Click Manage
- * Choose Vendor Performance
- * Click "Submit Pending Vendor Ratings"

Submitting the Vendor Performance Rating is optional, but is greatly encouraged to support vendor performance management and informed vendor selection for future business. You have 30 days to submit your Vendor Performance Rating for this transaction, after which the rating request will be purged.

This is an auto-generated email message. Please do NOT reply to this email.

If you have any questions regarding this email or Vendor Performance Tracking, please use the links provided below for general information and FAQ's:

[Vendor Performance Tracking Fact Sheet and FAQ](#)

Thank you for addressing this matter promptly.

This screen shot is an example of the email notification that customers receive. After clicking the link, you'll be taken MFMP Buyer.

Things to know:

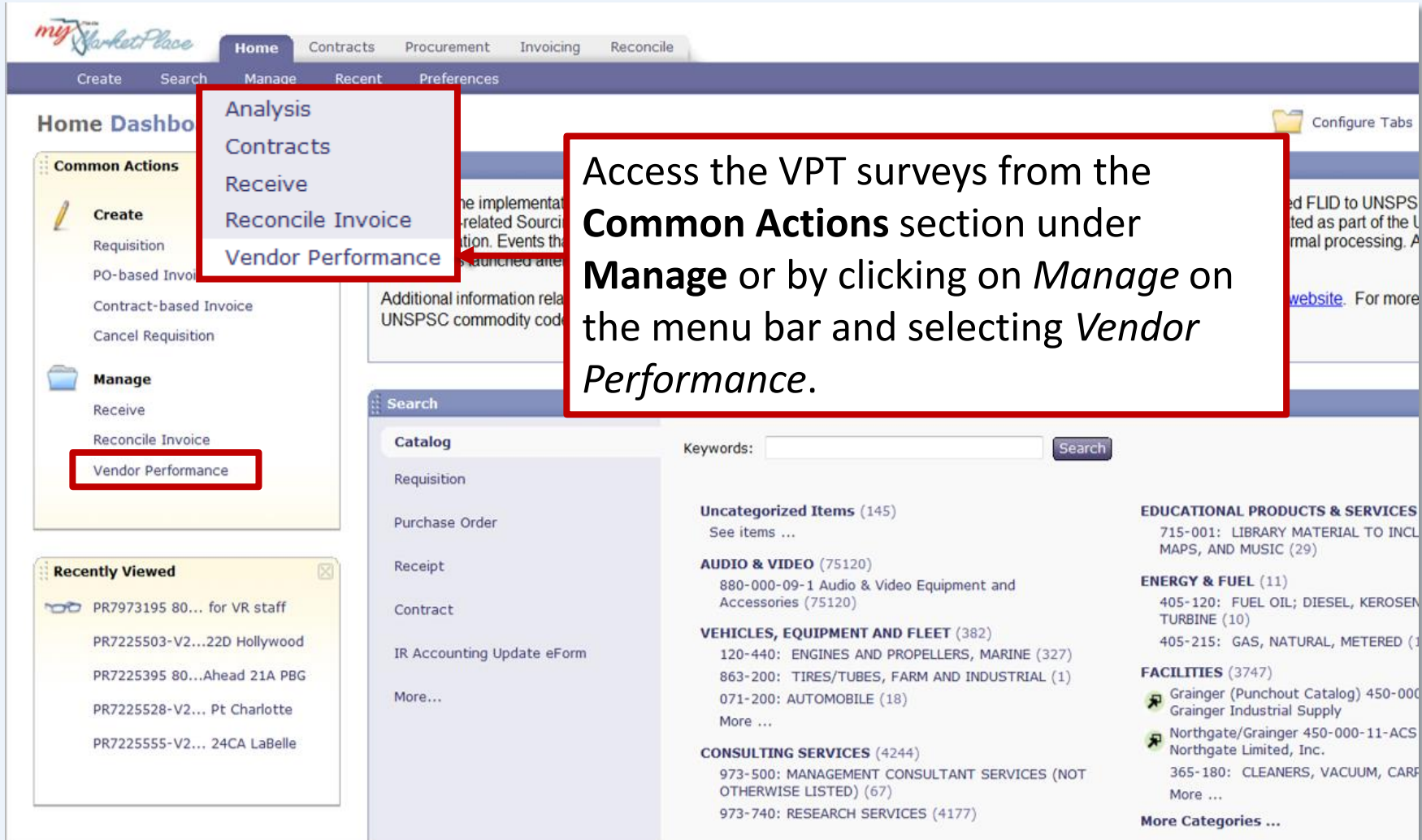
- MyFloridaMarketPlace sends an email for purchase orders or contracts to the:
 - Requester/OBO or
 - Contract manager/contact
- Agency customers will receive one email per day for all new pending surveys
- Surveys can be accessed through the **Common Actions** section on the dashboard
- Agency customers have 30 days to complete their VPT surveys

Choose Value for Vendor Location

Field:

Name ↑	LegacyID	Company	Street	City	State	Country	Woman-Owned / SDVBE Status	Vendor Designation	W9 Status	Pcard	ASB	Rating
Grainger, MD		Grainger, MD	Ste 310			States	SDVBE		on File			Rated
001_Grain Communications, LLC		Grain Communications, LLC	100 N. Washington Blvd., Suite 201	Sarasota	FL	United States	Non Woman-owned, Non-SDVBE	Black, Non-Certified	Valid W-9 on File	No	No	Not Rated
001_Main Office		Graingeco, LLC	12399 Belcher Rd S, Suite 110	Largo	FL	United States	Woman-Owned Non-Certified, Non-SDVBE	Non Minority	Valid W-9 on File		No	Not Rated
003_Grainger - West Palm Beach 482		Grainger Industrial Supply						Minority	Valid W-9 on File	Yes	Yes	Not Rated
005_Grainger - Jacksonville Brn 384		Grainger Industrial Supply						Minority	Valid W-9 on File	Yes	Yes	3.5
005_Sara Lee Baking Co, Mobile		Earthgrains Baking Company, Inc.	1201 W I65 Service Rd N	Mobile	AL	United States	Non Woman-owned, Non-SDVBE	Non Minority	Valid W-9 on File	Yes	No	3.4

Ratings display to the right when selecting a vendor. To see the vendor's rating by category and associated comments, click the *Rating*.



The screenshot displays the myMarketPlace interface with the following elements:

- Navigation Bar:** Home, Contracts, Procurement, Invoicing, Reconcile.
- Secondary Navigation:** Create, Search, Manage, Recent, Preferences.
- Home Dashboard:**
 - Common Actions:** Create (Requisition, PO-based Invoice, Contract-based Invoice, Cancel Requisition), Manage (Receive, Reconcile Invoice, **Vendor Performance**), Recently Viewed (PR7973195 80... for VR staff, PR7225503-V2...22D Hollywood, PR7225395 80...Ahead 21A PBG, PR7225528-V2... Pt Charlotte, PR7225555-V2... 24CA LaBelle).
 - Analysis Menu:** Analysis, Contracts, Receive, Reconcile Invoice, **Vendor Performance**.
- Search Section:** Search bar, Catalog (Requisition, Purchase Order, Receipt, Contract, IR Accounting Update eForm, More...), Keywords: Search.
- Product Categories:**
 - Uncategorized Items (145) - See items ...
 - AUDIO & VIDEO (75120) - 880-000-09-1 Audio & Video Equipment and Accessories (75120)
 - VEHICLES, EQUIPMENT AND FLEET (382) - 120-440: ENGINES AND PROPELLERS, MARINE (327), 863-200: TIRES/TUBES, FARM AND INDUSTRIAL (1), 071-200: AUTOMOBILE (18), More ...
 - CONSULTING SERVICES (4244) - 973-500: MANAGEMENT CONSULTANT SERVICES (NOT OTHERWISE LISTED) (67), 973-740: RESEARCH SERVICES (4177)
 - EDUCATIONAL PRODUCTS & SERVICES - 715-001: LIBRARY MATERIAL TO INCLUDE MAPS, AND MUSIC (29)
 - ENERGY & FUEL (11) - 405-120: FUEL OIL; DIESEL, KEROSENE TURBINE (10), 405-215: GAS, NATURAL, METERED (1)
 - FACILITIES (3747) - Grainger (Punchout Catalog) 450-000 Grainger Industrial Supply, Northgate/Grainger 450-000-11-ACS Northgate Limited, Inc., 365-180: CLEANERS, VACUUM, CARPET, More ...

Access the VPT surveys from the **Common Actions** section under **Manage** or by clicking on *Manage* on the menu bar and selecting *Vendor Performance*.

Pending Vendor Rating Submissions

Click on a Vendor Name:

Vendor Name

VERIZON WIRELESS SERVICES, LLC

Vendor Transaction Performance Rating

Category	Fails to Meet Most Requirements (1 Point)	Fails to Meet Some Requirements (2 Points)	Meets Requirements (3 Points)	Exceeds Some Requirements (4 Points)	Exceeds Most Requirements (5 Points)
Performance to Specification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Invoicing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide comment if any rating is other than "Meets Requirements". (1000 characters)

Please note that Florida has a very broad public records law. Unless expressly exempted, all records are subject to public disclosure. See chapter 119, Florida Statutes.

You have 1000 characters left

Submit

Reset

To access the survey, click on the name of the vendor that you are rating.

Rating anything more or less than **Meets Requirements** requires a brief explanation.

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- [MyFloridaMarketPlace](#)
- [MyFloridaMarketPlace University Training Materials](#)
- [Agency Customer Training Registration](#)
- [State Contracts and Agreements](#)
- [Buyer **Production** Environment](#)
- [Buyer **Training** Environment](#)
 - Username: Customer's MFMP username
 - Password: "train30"
- [Vendor Information Portal](#)
 - Username and password: "publicuser"

Contact the MyFloridaMarketPlace Customer Service Desk:

Phone: 866-352-3776

Email: BuyerHelp@MyFloridaMarketPlace.com

Hours: Monday – Friday, 8:00 a.m. – 6:00 p.m.,
Eastern Time