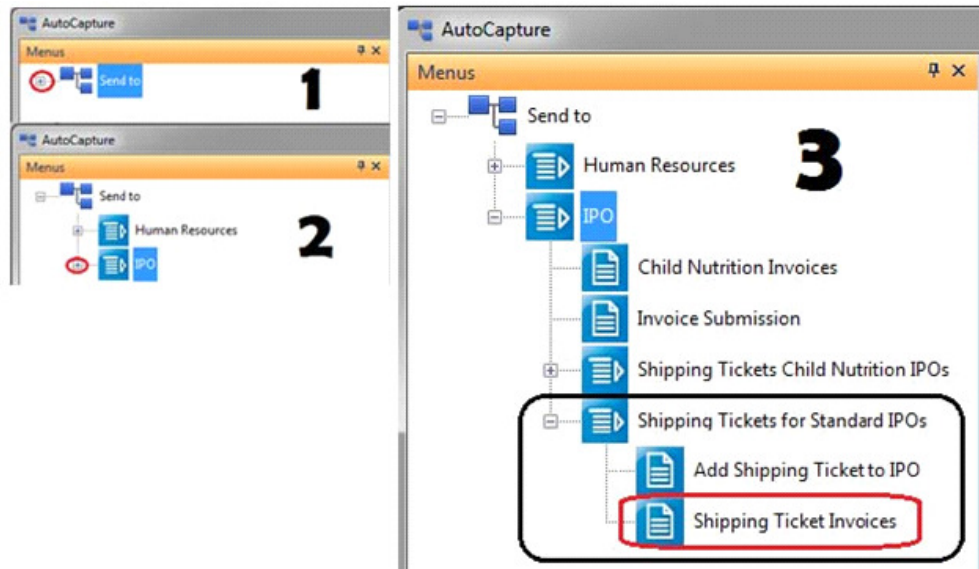


Shipping Tickets

IPOs that are in the Shipping Ticket (New) Folder

not starting with CN Shipping Tickets and Invoices

1. Open Send to
2. Open IPO
3. Open Shipping Ticket for Standard IPOs-Choose Shipping Ticket Invoices
4. Enter IPO into Search Field
5. Click Search and Choose IPO in Results Field
6. Fill in the Invoice Number, Invoice Amount, Actual Invoice Amount, Invoice Date and put initials in Notes



Appears In: Shipping Tickets (New)

Title
ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079
Appears In: Shipping Tickets (New)
Content snippet:
Internal Purchase Order Request Brooke Myers Notes: Invoice Number 0.00 Invoice Amount 24927
160781 Employee ID ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079 Invoice Title I

Invoice Submission

Search Field

2017116339

Search

Invoice Submission

Search Field

2017116339

Search

INFORMATION

IPO Info Retrieved

Results

2017116339 - CONROE WELDING 38000211, 66.99

IPO Number

2017116339

Title

CONROE WELDING 38000211 WO# 250391 20171163:

Invoice Number

CT852515

Invoice Amount

66.99

Actual Invoice Amount

66.99

Invoice Date

11/30/2017

Vendor/PO Number

CONROE WELDING 38000211

Work Order Number

250391

Notes

BM

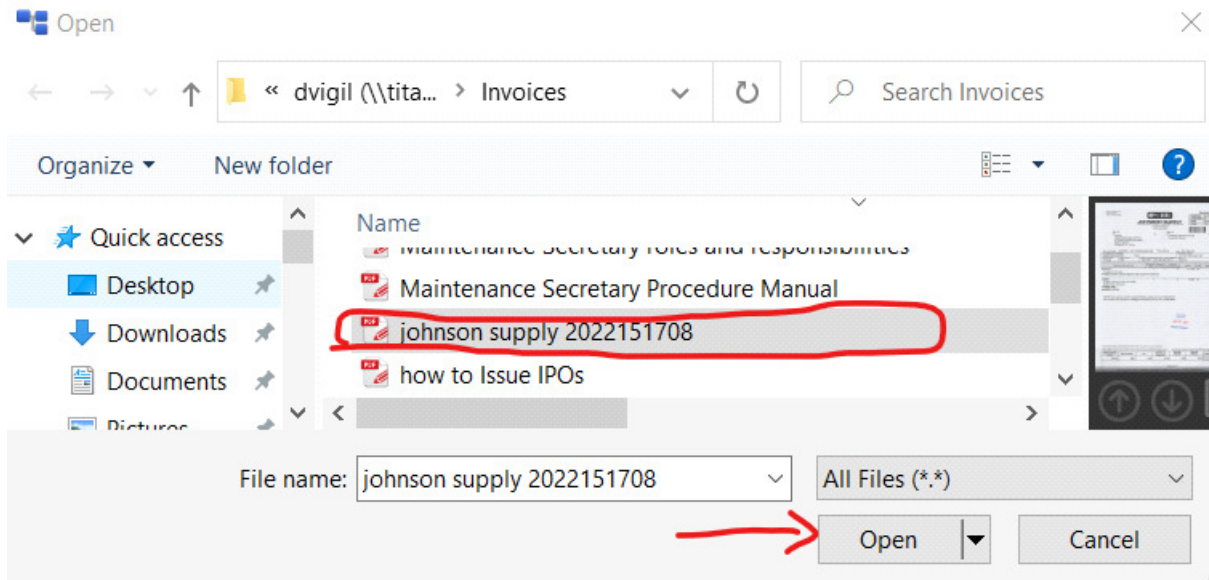
Employee ID

7. Go down to the file box Choose the new box

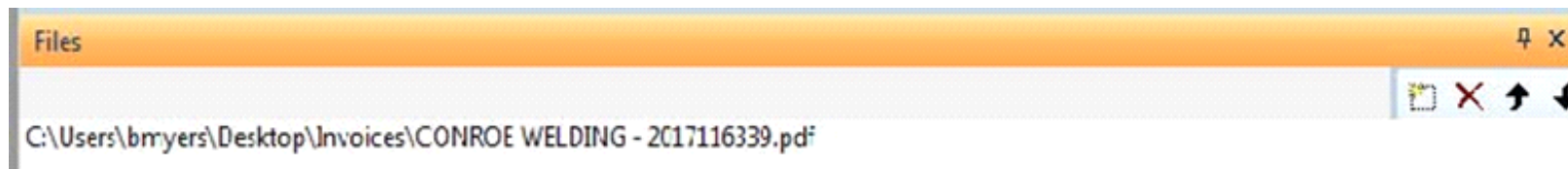
8. Once you click on the box, click on the 3 dots box to add invoice



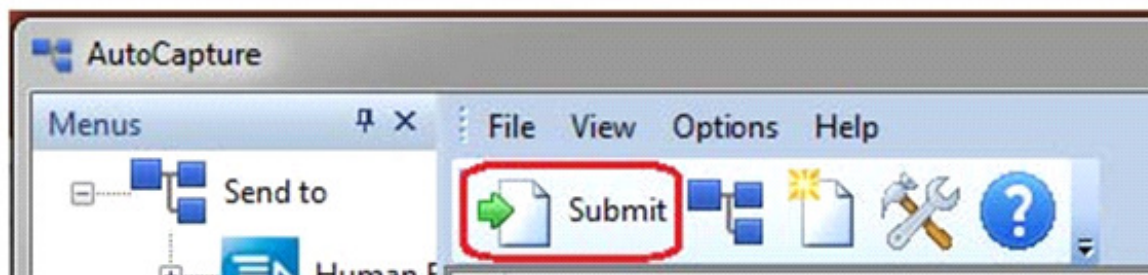
9. Window will open select invoice click Open



10. Window will close and file will appear in box

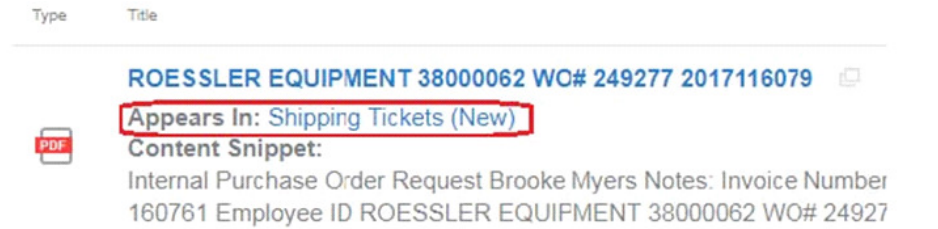


11.Hit Submit

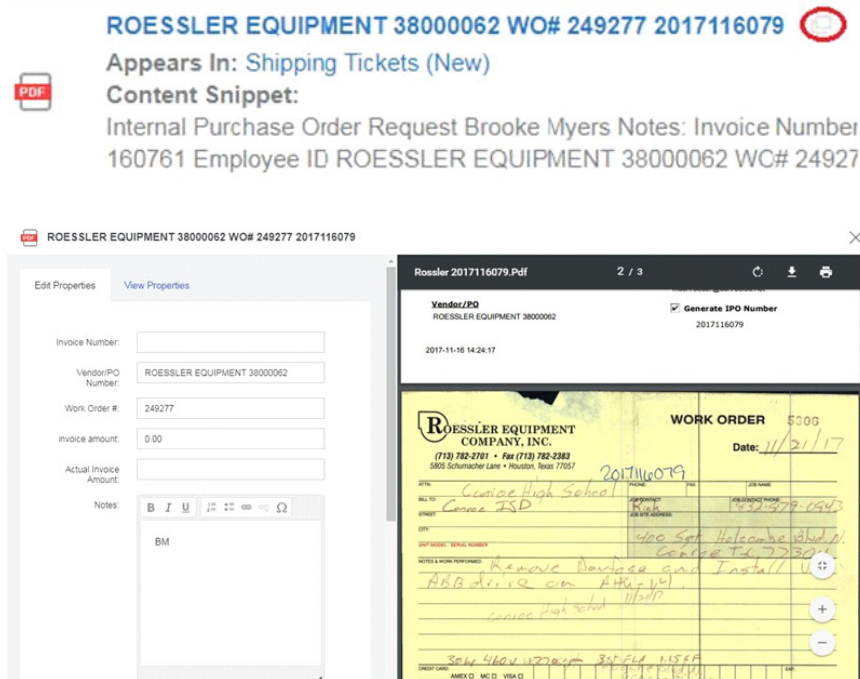


12. Double Check your IPO in DocuShare

Make sure your Shipping Ticket submitted correctly it **will not and should not** move folders.




13. Open the document to check if Ship ticket or Invoice uploaded (if not re-save invoice by printing file as a CutePDF Writer and save to invoice folder and repeat steps)



if you attached a shipping ticket
(NOT AN INVOICE)
this is the final step
until the invoice comes in

Repeat steps 1-13 once Invoice comes in and proceed to Step 14

14. Make sure your Invoice is Attached to the file.
Open the document to check it there

ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079 

Appears In: Shipping Tickets (New)

Content Snippet:

Internal Purchase Order Request Brooke Myers Notes: Invoice Number 0.00 Inv
Employee ID ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079 Inv

15. Make sure all your information is correct


Invoice Number: 661166

Vendor/PO Number: ROESSLER EQUIPMENT 38000062

Work Order #: 249277

Invoice amount: 5732.00

Actual Invoice Amount: 5732.00

Notes: 
BM

16. Scroll down passed the notes section in Approval Response choose Shipping Ticket IPO Complete Update and close

ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079


Invoice Number: 661166

Vendor/PO Number: ROESSLER EQUIPMENT 38000062


Work Order #: 249277

Invoice amount: 5732.00

Actual Invoice Amount: 5732.00

Notes: 
BM

Approval Response: Shipping Ticket IPO Complete



ROESSLER EQUIPMENT CO., INC.
5805 SCHUMACHER LN
HOUSTON TX 77067
Phone: 713-782-2701
Fax: 713-782-2383

00008394 Invoice

DATE: 11/29/2017 INVOICE #: 661166

BILL TO: CONROE IRS
1200 W. DAVIS
CONROE, TX 77384

SHIP TO: CONROE IRS
400 SUTHERLAND BLVD N
CONROE, TX 77384

P.O. NO.	TERMS	REP	SHIP DATE	SHIP VIA	OUR ORDER NO.
2017-116079	Net 30	NA	11/21/2017	Our Truck	51794

QTY	ITEM	DESCRIPTION	PRICE EACH	AMOUNT
1	4888	40 HP VFD - INSTALL FOR WORK ORDER 249277---VFD INSTALL ON 4888.14	5,732.00	5,732.00

Shipping Ticket IPO Complete

☐ Yes ☒ No

☐ Yes ☒ No


☐ Yes ☒ No

****Do not do approval response if attaching Shipping Ticket**

ONLY FINAL INVOICE

17. Go back and make sure invoice routed correctly

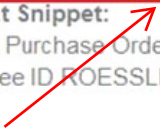
Title

ROESSLER EQUIPMENT 38000062 WO# 249277 2017116079  **NEW**

Appears In: KENNETH WELCH

Content Snippet:

Internal Purchase Order Request Brooke Myers Notes: Invoice Number 0.00 Invoice Amount
Employee ID ROESSLER EQUIPMENT 38000062 WO# 249277 **2017116079** Invoice Title Re



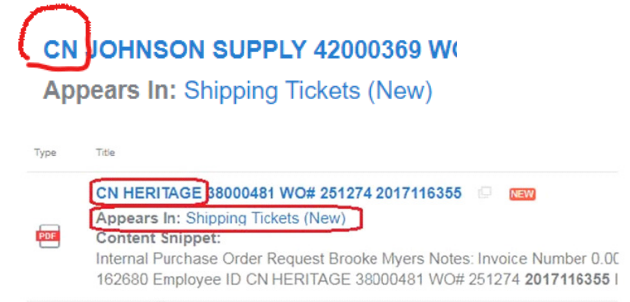
Should appear in a Supervisor, Asst. Director, or Directors folder

Child Nutrition Shipping Ticket

IPOs that title starts with CN and are in the Shipping Ticket (New) Folder

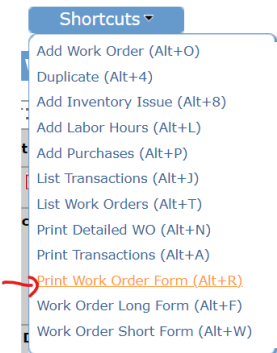
*All Child Nutrition should be shipping tickets

Child Nutrition Invoices require a copy of the work order to be attached to invoice.

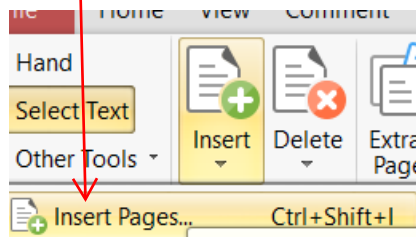
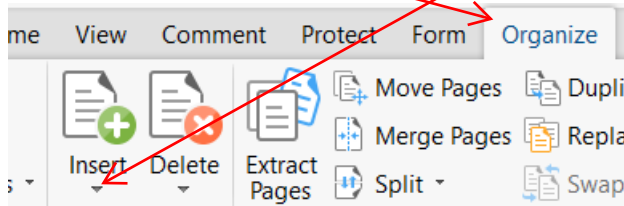


HOW TO ATTACH WORK ORDER FORM TO INVOICE

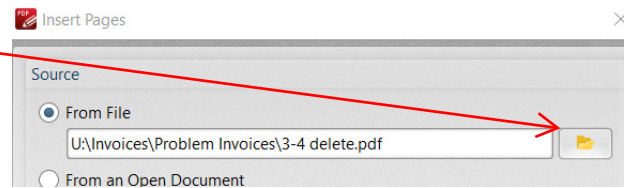
1. Open School dude Maintenance Direct
2. search work order number
3. click short cut menu and select print work order form



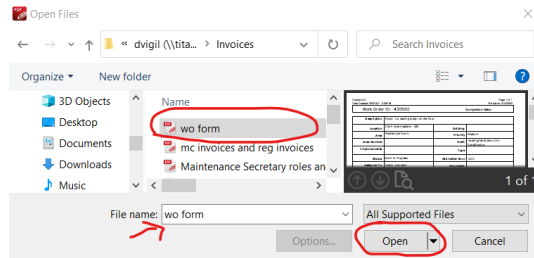
4. A new tab will open with Work Order form. Click the Printer button top right corner. Print to acute PDF Writer and save.
5. Open PDF of Invoice in your PDF Xchange Editor
6. Go to Organize tab> Click insert + drop down> Select insert Pages...



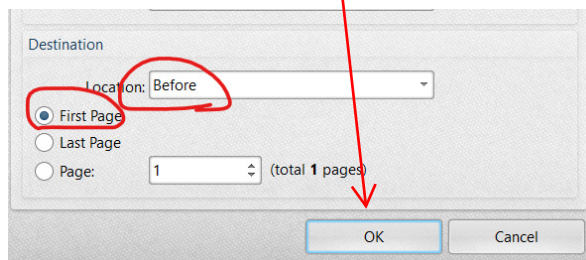
7. Insert Pages window will open click yellow folder



8. Select saved PDF of Work Order Form select Open



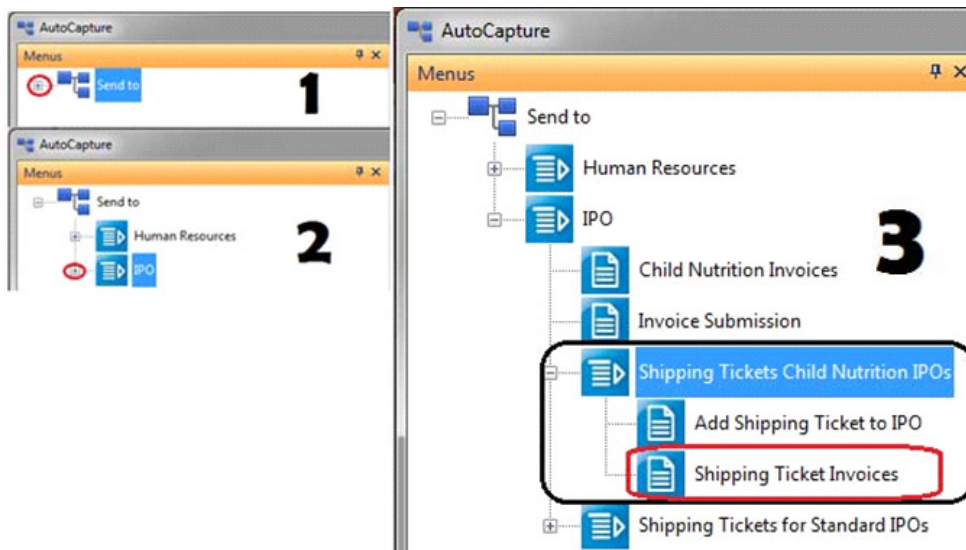
9. Insert Page window will show selected file, At the bottom of the page under Destination select Before from the drop down menu and click First Page and click OK



10. Save File

NOW PROCESS SAVED FILE

1. Open Send to
2. Open IPO
3. Open Shipping Ticket Child Nutrition IPOs-Choose Shipping Ticket Invoices
4. Enter IPO into Search Field
5. Click Search and Choose IPO in Results Field
6. Fill in the Invoice Number, Invoice Amount, Actual Invoice Amount, Invoice Date and put initials in Notes



Invoice Submission

Search Field
2017116339

Search

Invoice Submission

Search Field
2017116339

Search

INFORMATION
IPO Info Retrieved

Results
2017116339 - CONROE WELDING 38000211, 66.99

IPO Number
2017116339

Title
CONROE WELDING 38000211 WO# 250391 2017116339

Invoice Number
CT852515

Invoice Amount
66.99

Actual Invoice Amount
66.99

Invoice Date
11/30/2017

Vendor/PO Number
CONROE WELDING 38000211

Work Order Number
250391

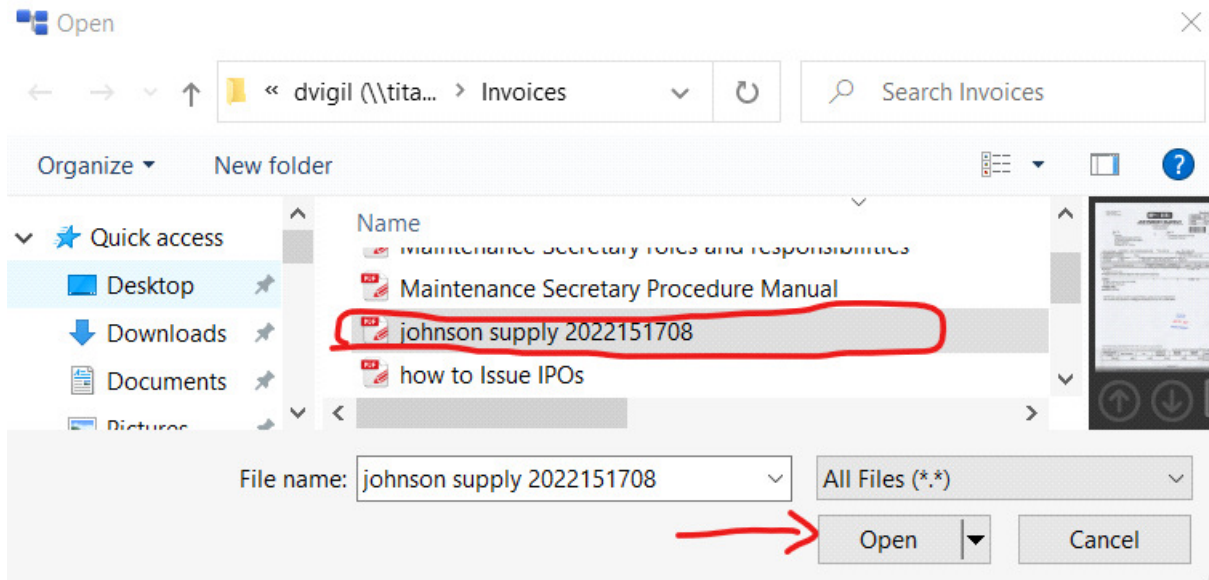
Notes
BM

7. Go down to the file box Choose the new box

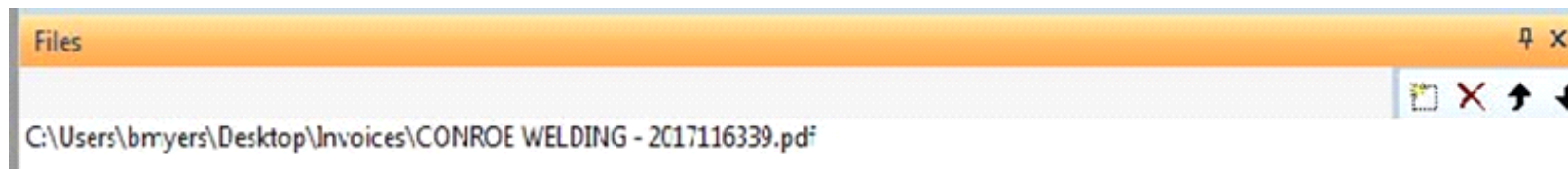
8. Once you click on the box, click on the 3 dots box to add invoice



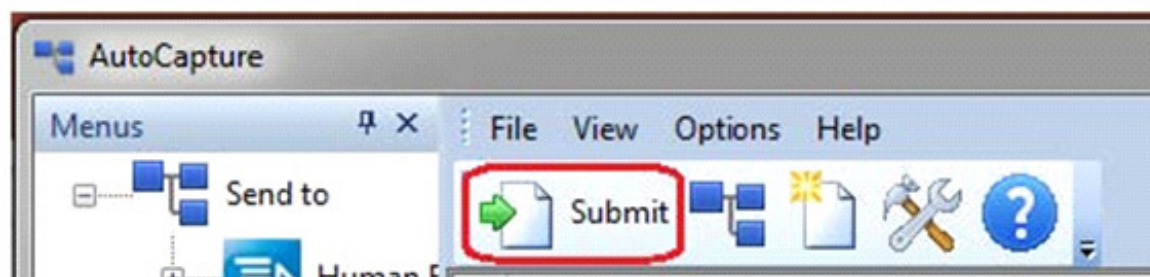
9. Window will open select invoice click Open



10. Window will close and file will appear in box



11.Hit Submit

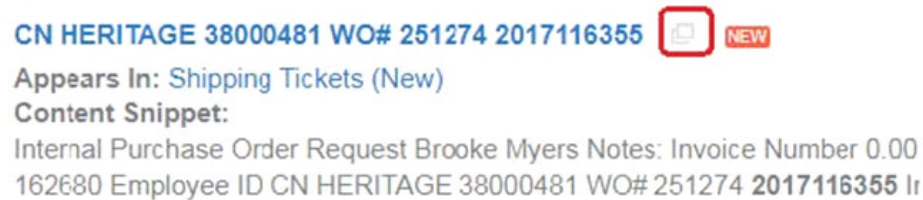


12. Double Check your IPO in DocuShare

Make sure your Shipping Ticket submitted correctly it **will not and should not** move folders.



13. Open the document to check if Ship ticket or Invoice uploaded (if not re-save invoice by printing file as a CutePDF Writer and save to invoice folder and repeat steps)



CN HERITAGE 38000481 WO# 251274 2017116355

Edit Properties View Properties

Invoice Number:

Vendor/PO Number: CN HERITAGE 38000481

Work Order #: 251274

Invoice amount: 0.00

Actual Invoice Amount:

Notes: BM 269.04

Department: 930

Director: MARSHALL SCHROEDER
mschroeder@convoisid.net

Vendor/PO: CN HERITAGE 38000481

Generate IPO Number: 2017116355

2017-12-05 07:12:26

HeritageParts.com

CALL 800-538-5593 MON-FRI 7:30AM - 6PM ET / SAT: 8AM - 3PM ET

Michael Nelson
The details of your order can be found in your [order history](#).

Did you know you can research, verify, and buy online at [HeritageParts.com](#)? Finding what you need online is as easy as talking with your Parts Expert. Give it a try today.

Purchase Order Number: 38000481

Part #	Description	Your Price	QTY	Total
WELLS44485	WELLS ELEMENT PAN ASSEMBLY	134.52	2	269.04

SUBTOTAL: \$269.04
SAVINGS: \$144.92
SHIPPING: TBD*

if you attached a shipping ticket
(NOT AN INVOICE)
this is the final step
until the invoice comes in

Repeat steps 1-13 once Invoice comes in and proceed to Step 14

14. Make sure your Invoice Attached to the file.

Open the document to check it there

CN HERITAGE 38000481 WO# 247279 2017115975  NEW

Appears In: Shipping Tickets (New)

Content Snippet:

Internal Purchase Order Request Brooke Myers Notes: Invoice Numt

Employee ID CN HERITAGE 38000481 WO# 247279 2017115975 Ir

15. Make sure all your information is correct

Invoice Number:	661166
Vendor/PO Number:	ROESSLER EQUIPMENT 38000062
Work Order #:	249277
Invoice amount:	5732.00
Actual Invoice Amount:	5732.00
Notes:	<div><div>B I U</div><div>BM</div></div>

16. Scroll down passed the notes section in Approval Response choose Shipping Ticket IPO Complete Update and close

CN HERITAGE 38000481 WO# 247279 2017115975

BM

Approval Response: Shipping Ticket IPO Complete

Requires Revision: ☐ Yes ☒ No

Send to AP: ☐ Yes ☒ No

Accounts Payable Coordinator:

Processing Complete: ☐ Yes ☒ No

UPDATE

CLOSE


Technician Name: www.schoolbute.com MaintenanceDirect

Date:

Confirmation:

Date:

Printed by Brooke Myers



Heritage Food Service Group, Inc.

5130 Executive Blvd

Fullerton, IL 60130

800-455-5593

Sold To:

1845 1 MB 0422 01/17/2018 0038 0000000481 01/18/2018 0001 0005

CONROE USD

ACCOUNTS PAYABLE

3005 W DAVIS ST

GOODYEAR, IL 61704-2000

Ship To:

CONROE USD

23075 DEFFERT WRIGHT

ATTN: R. CRUMES-WO247279

Burling Tr 77305

Invoice Number: 0004579479-IR

Date: 11/13/17

Sales Person: Connet

Customer: HFE35596

Page: 1 of 1

Customer P.O.:

2017115975

Ship Via:

UPS

F.O.B.:

DESTINATION

Terms:

NET 15

Shipping Ticket IPO Complete

☐ Yes ☒ No

☐ Yes ☒ No

☐ Yes ☒ No

UPDATE

CLOSE

****Do not do approval response if attaching Shipping Ticket**

ONLY FINAL INVOICE

17. Go back and make sure invoice routed correctly

CN HERITAGE 38000481 WO# 247279 2017115975  **NEW**

Appears In: 2.1 Child Nutrition First Approval



Content Snippet:

Internal Purchase Order Request Brooke Myers Notes: Invoice Nu

Employee ID CN HERITAGE 38000481 WO# 247279 201711597

SHOULD APPEAR IN 2.1 Child Nutrition First Approval

This is an example of incorrect routing



CN HERITAGE 38000481 WO# 247279 2017115975

Appears In: KENNETH WELCH



Content Snippet:

Internal Purchase Order Request Brooke Myers Note:

Employee ID CN HERITAGE 38000481 WO# 247279

If this happens give Doc
U Share a minute to
Route, If it doesn't email
Luis Mendoza to Correct

CONTRACTED SERVICES

EGordian

IPOs for Contracted Work
INVOICES FROM CONTRACTORS

Regular IPO and Ship Tickets

Appears In: 1 - IPO Requests

Appears In: Shipping Tickets (New)

After receiving invoice-look up IPO in Doc u Share to see what folder it is in. If title starts with "G" it should have a Gordian IPO. TO FIND BOTH IF NOT LINKED Search by Work Order number.

GORDIAN GROUP 38000113 WO# 245755 2017115644

Appears In: 1 - IPO Requests

Content Snippet:

Internal Purchase Order Request WM Notes: Invoice Number 0.00 Invoice #
Employee ID GORDIAN GROUP 38000113 WO# 245755 2017115644 Invoi

G ABLE GLASS (CONTRACT) 38000078 WO# 245755 2017115643

Appears In: 1 - IPO Requests

Content Snippet:


Internal Purchase Order Request WM Notes: Invoice Number 0.00 Invoice #
Employee ID G ABLE GLASS (CONTRACT) 38000078 WO# 245755 20171

1.Login into eGordian

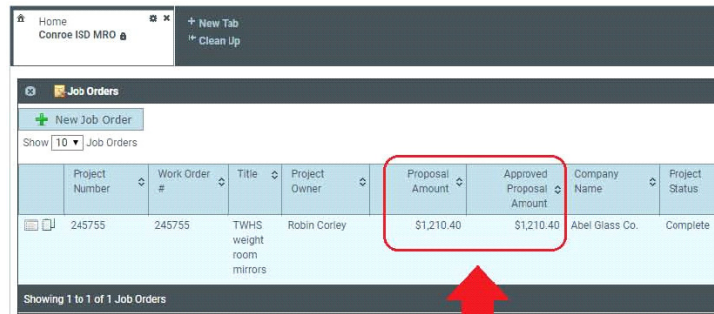


2. Search Work Order Number

Search for: 

 Grouping  Clear

3. Job will come up verify proposal amount and approved proposal amount match invoice



The screenshot shows a web browser window with the 'Job Orders' section. A table lists job orders, with one entry highlighted. A red box highlights the 'Proposal Amount' and 'Approved Proposal Amount' columns for the selected job order, and a red arrow points to them from the text below.

Project Number	Work Order #	Title	Project Owner	Proposal Amount	Approved Proposal Amount	Company Name	Project Status
245755	245755	TWHS weight room mirrors	Robin Corley	\$1,210.40	\$1,210.40	Abel Glass Co.	Complete

These 2 numbers need to match total on invoice.

4. click on job and open

5. Scroll down to the Job Order Misc and fill out.

Contractor IPO

WOID

Gordian IPO

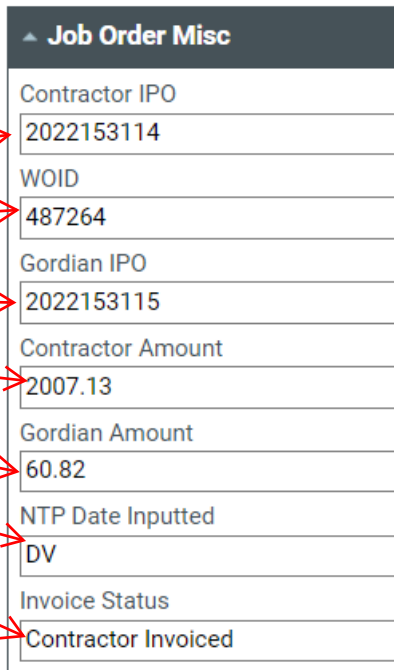
Contractor Amount

Gordian Amount =

(contractor amount x 3.03%)

NTP date inputted= Initials

Invoice status= Contractor Invoiced



The screenshot shows the 'Job Order Misc' form. Red arrows point from the labels on the left to the corresponding fields in the form.

Job Order Misc	
Contractor IPO	2022153114
WOID	487264
Gordian IPO	2022153115
Contractor Amount	2007.13
Gordian Amount	60.82
NTP Date Inputted	DV
Invoice Status	Contractor Invoiced

6. To the Left under In Actions find Tracking Dates Click on open

Actions

Follow this Job Order

Populate with Project Info

Job Order Sent to Contractor

Contractor: [Send Job Order to Contractor](#)

* Select "View History" for all previous Job Order activity.

Job Order Components:

Estimates

Evaluation

Related Links

Invoices

Locations (1)

Logs

Meetings

People (1)

Proposal Review (1)

Price Proposals (1)

Specialty Schedule

Subcontractors

Tracking Dates

7. Find Notice to Proceed Issued Fill in Actual Date

Description	Planned Date	Adjusted Date	Actual Date
Construction Start			
Construction Complete			
Estimate Prepared			
Identification Date			
JOC Start			
Joint Scope			
Notice to Proceed Issued			
Project Entered			
Proposal Approved			
Proposal Due			
Proposal Received			
RFP Issued			

8. close tab in Gordian



After this is done process your invoice according to the folder it is in

EGordian

IPOs for Gordian

INVOICES FROM GORDIAN

Regular IPO and Ship Tickets

Appears In: 1 - IPO Requests

GORDIAN GROUP 38000113 WO# 251053 2017116371 

Appears In: 1 - IPO Requests

Content Snippet:

Internal Purchase Order Request tr Notes: Invoice Number 0.00 Invoice A
Employee ID GORDIAN GROUP 38000113 WO# **251053** 2017116371 Inv

After receiving invoice-look up IPO in Doc u Share to see what folder it is in. Search by Work Order number to make sure Contractor Invoice is processed it will appear in a supervisor, asst.direct, director,...etc. folder.

G ALLY ROOFING 38000065 WO# 251053 2017116370  **NEW**

Appears In: ROBIN CORLEY

Content Snippet:

Internal Purchase Order Request tr Notes: Invoice Number 0.00 Invoice A
Employee ID G ALLY ROOFING 38000065 WO# **251053** 2017116370 Inv

GORDIAN GROUP 38000113 WO# 251053 2017116371 

Appears In: 1 - IPO Requests

Content Snippet:

Internal Purchase Order Request tr Notes: Invoice Number 0.00 Invoice A
Employee ID GORDIAN GROUP 38000113 WO# **251053** 2017116371 Inv

1. Login into eGordian



2. Search Work Order Number

Search for:

3. Job will come up verify the work is entered in Invoice Status should say: Contractor Invoiced

New Job Order

How Job Orders

Project Number	Work Order #	Title	Project Owner	Proposal Amount	Approved Proposal Amount	Company Name	Project Status	Date Created	Display Name	Contractor IPO	WOID	Gordian IPO	Contractor Amount
480678pl	480678pl	Reaves roof drain repair	Wayne McRorie	\$1,034.74	\$1,034.74	Burke Family Plumbing LLC	Construction Complete	3/9/2022	Plumbing	2022152788	480678	2022152789	1034.74

4. click on job and open

5. Scroll down to the Job Order Misc and verify information is filled out and Change Invoice Status Invoice status= Processed initials

Job Order Misc

Contractor IPO
2020139093

WOID
384345

Gordian IPO
2020139094

Contractor Amount
620.00

Gordian Amount
18.79

NTP Date Inputted
BR

Invoice Status
PROCESSED DV

8. close tab in Gordian



After this is done process your invoice according to the folder it is in