Sam's Club In-Store Shopping

<u>NOTE:</u> Purchases from Sam's Club are limited to non-bid items only. Use Conroe ISD awarded bid vendors for office supplies, toner cartridges, clinic-type supplies, technology, etc. Check with warehouse for cleaning supplies and PPE items (gloves, masks, etc.). If any non-approved items are purchased, the individual will be responsible for returning or paying for those items personally.

**********NO GIFT CARDS ARE ALLOWED UNDER ANY CIRCUMSTANCES***********

--You can use a Purchase Order to shop in store at the Conroe location (#6421) or the Shenandoah location (#4713) only. --

CREATE YOUR REQUISITION:

Vendor # 24000711 (for store #6421-Conroe & #4713- Shenandoah)

Comments RFP#22-01-05 X7/27 and RFP#22-01-07 X7/27

Buyer Your name Ship To Your campus

LINE #1--REQUIRED

Commodity # **200-001** – Food/ Groceries

Description Food/Groceries to be picked up by (input name of pickup person).

Account code # **6499-**Misc Other Expense

Unit Price Enter a rounded-up total, ex. \$100, \$200 (do not enter exact prices from website

as in-store prices may vary slightly)

**EVEN IF YOU ARE NOT PURCHASING <u>FOOD ITEMS</u> ON THIS REQUISITION, <u>YOU ARE STILL REQUIRED</u> TO INCLUDE THIS LINE. YOU WILL NEED TO PLACE \$1.00 FOR THE UNIT PRICE. **

LINE #2--REQUIRED

Commodity # 200-002 – General Supplies (no cleaning, PPE, or clinic-type items are allowed)

Description General Supplies to be picked up by (input name of pickup person).

Account code # **6399-**General Supplies

Unit Price Enter a rounded-up total, ex. \$100, \$200 (do not enter exact prices from website

as in-store prices may vary slightly)

**EVEN IF YOU ARE NOT PURCHASING <u>NON-FOOD ITEMS</u> ON THIS REQUISITION, <u>YOU ARE STILL REQUIRED</u> TO INCLUDE THIS LINE. YOU WILL NEED TO PLACE \$1.00 FOR THE UNIT PRICE. **

If you are purchasing **STAMPS**:

Commodity # 550-006 – Postage

Description Postage to be picked up by (input name of pickup person).

Account code # **6399-**General Supplies

Unit Price Enter a rounded-up total, ex. \$100, \$200 (do not enter exact prices from website

as in-store prices may vary slightly) Only include line#1/Line#2 above IF you are getting

more than just stamps with this PO.

Line #1 - REQUIRED FOR CATERING AT THE CAFÉ ONLY

Commodity # 200-001 – Food/ Groceries

Description Café Items: Pizza to be picked up by (input name of pickup person).

Account code # **6499-**Misc Other Expense

Unit Price Enter a rounded-up total, ex. \$100, \$200 (do not enter exact prices from website

as in-store prices may vary slightly)

If you are purchasing items from the Café, you <u>MUST</u> have an agenda for the event: date of the event, who will be attending, name of the event, a brief description of what you will be serving. If any non-approved items are purchased, the individual will be responsible for returning or paying for those items personally.

LINE #2--REQUIRED

Commodity # 200-002 – General Supplies (no cleaning, PPE, or clinic-type items are allowed)

Description General Supplies to be picked up by (input name of pickup person).

Account code # 6399-General Supplies

Unit Price Enter a rounded-up total, ex. \$100, \$200 (do not enter exact prices from website

as in-store prices may vary slightly)

**EVEN IF YOU ARE NOT PURCHASING <u>NON-FOOD ITEMS</u> ON THIS REQUISITION, <u>YOU ARE STILL REQUIRED</u> TO INCLUDE THIS LINE. YOU WILL NEED TO PLACE \$1.00 FOR THE UNIT PRICE. **

Total Purchase Order limit: \$500.00—Unless you contact Graciela Lopez in Purchasing for PRIOR approval @ X97650.

** PO is for one-time purchase**

Enter the requisition as stated above. When the requisition is approved and converted into a purchase order, pull up the Purchase Order in eFinancePlus under Purchase Order listing, click on the orange Attachments icon, and print a copy of the PO. The person listed on the Purchase Order will take the printed PO to the Sam's store along with their Conroe ISD badge and their driver's license for identification.

<u>1st</u> PRIOR TO SHOPPING, check in at the membership desk and request to talk to a Green-Vested Supervisor. Only the person(s) whose names are listed on the purchase order will be permitted to shop. They must show a CISD ID badge and driver's license as identification. The Supervisor will verify that the ID's and the name on the PO matches. Supervisor will PULL the Conroe ISD account card and verify the amount, then initial and date the original purchase order.

<u>2nd</u> Shop for the items needed and go to any manned register to check-out. Do not use self- checkout. The purchase order number tells the cashier how much money is authorized. *Tell the cashier to call the* Green-Vested Supervisor to bring the CISD Sam's membership card that is kept on file to swipe on the register for payment.

<u>3rd</u> Submit original receipt(s) to Accounts Payable within five (5) days of the purchase. Receipts need to be taped (not stapled) to an 8-1/2" x 11" piece of paper and list the Sam's PO number. This order will be paid and closed and any remaining balance will be returned

*******PLEASE NOTE****PLEASE NOTE****PLEASE NOTE****PLEASE NOTE

YOU MUST list on your paper the split between the TWO accounts (#6499 FOOD) and (#6399 NON-FOOD). Write the total to be allocated towards ACCT #6499 and the total to be allocated to ACCT #6399. There MUST BE enough money allocated for each of the two accounts, (#6499) and (#6399), if you have both accounts listed on the requisition. CONFIRM that there is enough on the PO in the appropriate line. SCHOOLS are responsible for ensuring that all items on the receipt are properly allocated between the two accounts/lines BEFORE you submit your receipts to Accounts Payable.

Revised September 22, 2023

