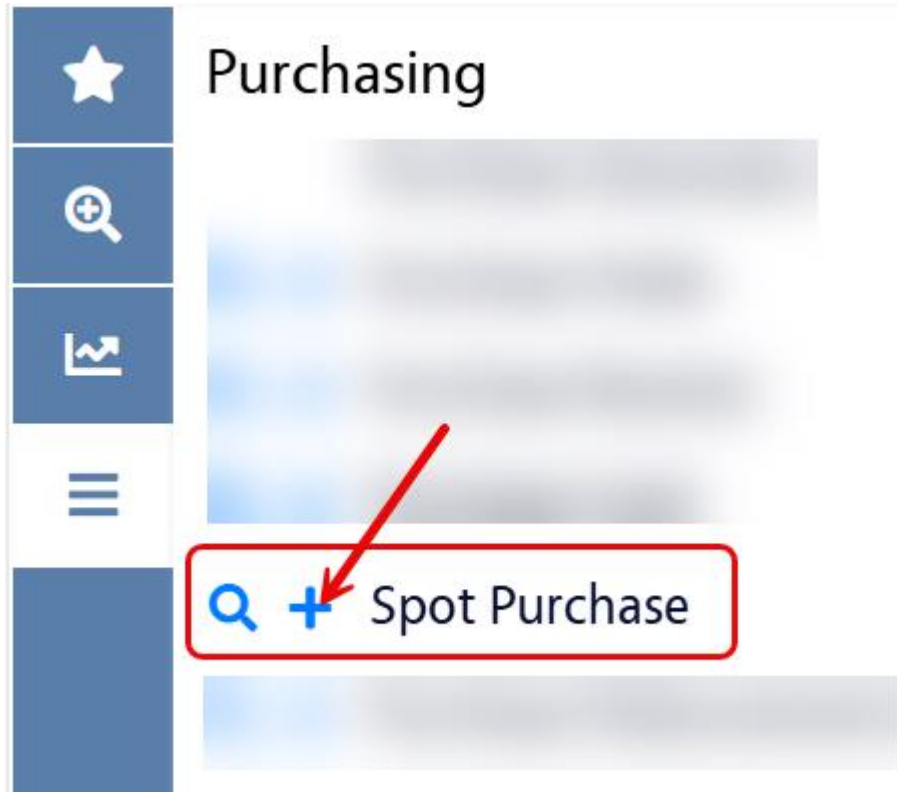


## Create Spot Purchase Using AiM

A Spot Purchase is normally used when purchasing items from a vendor either with cash or a credit card and not using a Purchase Order.

Note: Although a Spot Purchase has the option for Catalog and Non-Stock, this training guide is for Non-Stock as UCB decided to use Non-Stock parts for Spot Purchases.

1. From the menu, under **Purchasing**, click **Spot Purchase** hyperlink and then click “New”. Alternatively, click “+” from the menu.




The screenshot shows the 'AiM Spot Purchase' interface. At the top, there are 'Save' and 'Cancel' buttons. The main form is divided into several sections:

- Header:** '1965' and 'Last Edited by BEATRIZ ANTEQUERA On 6/26/24 8:37 AM'.
- Left Sidebar:** 'View' menu with options: 'Extra Description', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'.
- Main Form Fields:**
  - Contractor: [Searchable field]
  - Address Code: [Searchable field]
  - Contact: [Searchable field]
  - Terms: [Text field]
  - Bank: [Searchable field]
  - Speedtype: [Searchable field]
  - Check Number: [Text field]
  - Work Order: [Searchable field]
  - Phase: [Searchable field]
  - Line Item Type: [Dropdown menu]
- Right Summary Table:**

Status	ENTERING
Entry Date	Jun 26, 2024
Markup	15.67%
Placed By	ANTEQUER
Reference Number	BEATRIZ ANTEQUERA
Currency	USD
	US DOLLAR
Subtotal	\$0.00
Tax	\$0.00
Markup	\$0.00
Total	\$0.00


At the bottom, there is a 'Line Items' section with a table header: 'Line', 'Vendor Part', 'Description', 'UOM', 'Quantity', 'Work Order', 'Phase', 'Line Total'. There are 'Remove' and 'Add' buttons.


2. Enter the **Contractor** you are ordering from:


- a. If you know the Contractor ID number, type it in. Click .

This close-up shows the 'Contractor' field with the value '11453' entered. A red box highlights the field, and a red arrow points to the magnifying glass icon next to it, labeled with a red circle containing the number '2'. Another red arrow points to the 'Address Code' field, labeled with a red circle containing the number '1'.

- b. If you don't know the Contractor ID number, click .

Contractor  

Address Code  

Contact  

Terms

1. A new window opens with a list of Contractors. If your Contractor is listed, click the Contractor hyperlink to select it.

**AiM Contractor**

Done Search Cancel

<u>Contractor</u> ↓	<u>Description</u>
<a href="#">000000137</a>	DWYER INSTRUMENTS
<a href="#">000000166</a>	MARMON KEYSTONE
<a href="#">000000266</a>	JB SAUNDERS
<a href="#">000000312</a>	INTERLINE/SUPPLYWORKS
<a href="#">000000406</a>	BUFFALO LOCK & KEY

2. If you need to search for a Contractor, click “Search”.

### AiM Contractor

Done	Search	Cancel
Contractor ↓	Description	
<a href="#">000000137</a>	DWYER INSTRUMENTS	
<a href="#">000000166</a>	MARMON KEYSTONE	
<a href="#">000000266</a>	JB SAUNDERS	
<a href="#">000000312</a>	INTERLINE/SUPPLYWORKS	
<a href="#">000000406</a>	BUFFALO LOCK & KEY	

1. Enter the Contractor name in the “Description” field, click “Execute”.  
Note: Below is an example of searching by “Home Depot”.

### AiM Contractor

Execute	Reset
★	Operator
Contractor	= [ ]
Description	contains [HOME DEPOT]
1099 Code	= [ ]
Qualified	= [ ]
Expiration Date	= [ ]

2. Click the Contractor hyperlink to select from the list.

### AiM Contractor

Done	Search	Show All	Cancel
Contractor ↓	Description		
<a href="#">11453</a>	HOME DEPOT		

3. Contractor field will be filled in and automatically populates the “Address Code” field – do not change this value.

Contractor: 11453

HOME DEPOT

Address Code: NONE

Contact: [Empty]

Terms: [Empty]

Do not change

3. Enter the line item:

a. Click "Add".

AiM FM Information Systems Home fm.colorado.edu/internal/is/home.html

BEATRIZ

Save Cancel

View 1965 Last Edited by BEATRIZ ANTEQUERA On 6/26/24 8:37 AM

Extra Description  
Notes Log  
User Defined Fields  
Status History  
Related Documents

Contractor: 11453  
HOME DEPOT

Address Code: NONE

Contact: [Empty]

Terms: [Empty]

Bank: [Empty]

Speedtype: [Empty]

Check Number: [Empty]

Work Order: [Empty]

Phase: [Empty]

Line Item Type: [Dropdown]

Status: ENTERING

Entry Date: Jun 26, 2024

Markup: 15.67%

Placed By: ANTEQUER

Reference Number: [Empty]

Currency: USD  
US DOLLAR

Subtotal: \$0.00

Tax: \$0.00

Markup: \$0.00

Total: \$0.00

Remove Add

Line	Vendor Part	Description	UOM	Quantity	Work Order	Phase	Line Total
------	-------------	-------------	-----	----------	------------	-------	------------

b. Select "Non-Stock", click "Next".

## AiM Add New Line Item

c. Enter the fields, click “Done”.

**Note:**

1. Vendor Part: If unknown, or receipt is for more than one part, enter “N/A” or “VARIOUS” as appropriate.
2. UOM: Enter EA.
3. Unit Cost: Enter total amount on the receipt.
4. Quantity: Enter 1 (it is always 1, total of ONE receipt).
5. Work Order: Enter Work Order number.
6. Phase: This field populates automatically if the Work Order has only one Phase; otherwise, select the appropriate Phase.


**4. Add Receipt:**

- a. Click “Related Documents”.

## AiM Spot Purchase

b. Click “Add” in the “Document Listing” section.

c. Find the receipt to attach, click “Next”.

d. Select the **Type** “IMAGES” or type it in – click  , if you typed in the value. Click “Next”.

**AiM New Document**

Next Cancel

Upload File(s) **2**

Add Meta Data

Add Attributes

Add Permissions

Title: IMG\_8070.jpg

Type: IMAGES **1**

Tags

File Name(s): IMG\_8070.jpg

e. Click "Next".

**AiM New Document** BEATRIZ

Next Cancel

Upload File(s)

Add Meta Data

Add Attributes

Add Permissions

Permissions

Role	Description	View	Edit
------	-------------	------	------

Load


f. Click "Done".

**AiM Related Documents** BEATRIZ

Done Cancel

1965 Last Edited by BEATRIZ ANTEQUERA On 6/26/24 8:37 AM

Document Listing

Thumbnail	Title	Current Version	Document Type	Extra Description	Related On
<input type="checkbox"/>	 IMG_8070.jpg	1.0	IMAGES		Jun 26, 2024

Attach Link Remove Add

5. Select Status "Submit", click "Save".



AiM Spot Purchase

BEATRIZ   

**Save** Cancel

**View** 1965 Last Edited by BEATRIZ ANTEQUERA On 6/26/24 8:37 AM

Extra Description **2**

Notes Log

User Defined Fields

[Status History](#)

[Related Documents](#)

Status **1** **SUBMIT**

Entry Date Jun 26, 2024

Markup 15.67%

Placed By ANTEQUERA

Reference Number BEATRIZ ANTEQUERA

Contractor **11453** HOME DEPOT

Bank

Address Code **NONE**

Speedtype

Contact

Check Number

Terms

Currency **USD** US DOLLAR

Subtotal \$100.00

Tax \$0.00

Markup \$15.67

Total \$115.67

Work Order

Phase

Line Item Type

**Line Items** **Remove** **Add**

Line	Vendor Part	Description	UOM	Quantity	Work Order	Phase	Line Total
<input type="checkbox"/> 1	N/A		EA	1.0000	W2027837	001	\$115.67

Do not change.