

Entering a Future Year Order

1. Prepare your cart
2. Proceed to check out
3. Go to final review
4. In the Billing Section – Click, “edit” button on Billing Options

The screenshot shows the Banner Requisition interface. At the top, there are tabs for 'Requisition', 'PR Workflow', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below these are sub-tabs for 'Summary', 'Shipping', 'Billing', 'Accounting Codes', 'Facilities Line', 'Supplier Info', and 'Shipping/Handling Estimate'. The 'Billing' sub-tab is highlighted with a red box. Underneath, there are sections for 'General', 'Shipping', and 'Billing'. The 'Billing' section contains 'Bill To' information (Accounts Payable, Box 5903, 601 S. College Rd., Wilmington, NC 28403, United States) and 'Billing Options' (Accounting Date: 7/1/2018, BudgetOverride: no value). An 'edit' button is located next to the 'Accounting Date' field, highlighted with a red box. A green arrow points to this button with the text 'Click Edit'.

5. Change the Accounting date to **7/1/20xx**. * **7/1/20xx is the only date that should be entered**
6. If the budget has not been loaded for the future year then you will need to request a Budget Override – See next section for instructions. NOTE: Once budgets are loaded into Banner, budget override is not needed.

Budget Override Request

1. In the Billing section by Billing Options of the uShop requisition – Click “edit”

The screenshot shows the Banner Requisition interface, specifically the 'Billing' section. The 'Billing' tab is highlighted with a red box. Below it, there are sections for 'Bill To' (Accounts Payable, Box 5903, 601 S. College Rd., Wilmington, NC 28403, United States) and 'Billing Options' (Accounting Date: 7/1/2018, BudgetOverride: no value). An 'edit' button is located next to the 'Accounting Date' field, highlighted with a red box. A green arrow points to this button with the text 'Click Edit'.

2. Change the BudgetOverride flag to Yes by clicking “Select from all values”, Choose “Yes”
3. Attach a completed Budget Override Request Form in the Internal Notes and Attachments section of your uShop requisition. The Budget Office will not complete your override request without this form attached. Emailing the Budget Offices is no longer necessary.

Requestors should monitor BAVL beginning Mid-May for the budgets for next fiscal year. Once budgets are loaded, the budget override request is no longer necessary.