

## Entering in a Requisition

1. Select Purchasing
2. Select Request for Purchase Entry and Changes
3. **Vendor Search:** You can use either the bullets or enter in vendor name in the Vendor search field
4. Select “Find Vendor”

The screenshot shows the top portion of a web application interface. At the top, there is a blue header with the text "Request for Purchase Entry and Changes" and a navigation bar with letters A through Z in circles. Below this, the "Vendor Search" section contains a text input field with "My new Vendor" entered, followed by "or PO#" and another empty input field. There are two buttons: "Find Vendor" and "Add Vendor". Below these is a "Vendor(s)" dropdown menu and an "Address:" label. Further down are labels for "Phone", "Fax", and "E-mail". To the right, there is a "Purchase Request Reports" section with two checkboxes: "Display Vendor Quick Pick List" (checked) and "Display Vendor History" (unchecked).

- a. If you need to add a new vendor, enter in the Vendor name in Vendor Search and select “Add Vendor”.

This screenshot shows the same interface as the previous one, but with the "Add Vendor" form open. The "Vendor Search" field now contains "My new Vendor". A red error message at the top of the form reads: "The vendor requested was not found. Complete this form and push 'Save' to setup a new vendor." The form has a "Save" button and a "Cancel" button. The form fields are as follows:

Vendor Number:	10968	Phone:	
Vendor Name:	My new Vendor	Fax:	
Address Line 1:		E-mail:	
Address Line 2:			
City:		S.S. Number or Fed ID:	
State:		1099 Vendor YN:	
Zip Code:		Remitt to Vendor Number:	
Notes:			

- b. Enter in required information for the new Vendor (address, phone, email, etc.)
- c. Select Save

5. If applicable; select Current or Next Fiscal Year---**Should only need to watch in the month of JUNE**- if unsure please contact the District Office for clarification.

6. Select “New Request”

7. **1. Order For:** Select the person or group placing the order- should be the same as **Group**
8. **Order From:** Vendor information
9. **PO# (Optional) and PO Date (optional):** These fields are optional. **Normal processing will assign a PO number and PO date when the request is authorized.**
10. **2. Ship to Information:** Verify the ship to information and make changes, if needed
11. **Request Number:** Requisition number assigned
12. **Dated:** Date Requisition was entered
13. **Group:** Authorization group required to approve Requisition – should be the same as **Order For**

- a. **Authorize on Save:** **DO NOT USE.** To be used with supervisor status only; for the ability to override ALL other approvers upon Save
- b. **Show Budget:** To display Budget for line item, upon data entry of requisition
- c. **Retain Account Number:** Select to repeat Account Number for all line entries
- d. **Mass Change Account Number:** Select to mass change multiple line entries with incorrect Account Numbers
- e. **Account Title Sequence in Account Drop Down.** Display First “20 Accounts: Determine the amount of accounts to select from, upon data entry

- f. **Attach a Document to Request:** Select if you have a quote or other document to attach to the Requisition

Document Storage and Retrieval	
Add	Delete
File Path/Name:	Browse...
Description:	
Security Group:	▼

- i. Click Browse to locate the document on your computer
    - ii. Enter a Description such as "Quote for Instruments 3/17/2020"
    - iii. Select a Security Group (optional)
    - iv. Select Add
  - g. **Delete/Cancel Entire Request:** Select If you do not need the Requisition started you must use this to delete the full PO. If you just delete the lines it will stay out there.
14. **3.** Select Requisition Entry option:
- a. **Standard:** New request entry
  - b. **Copy Old PO Requests:** Prior POs entered you can choose to copy from
  - c. **% Distribution:** allows you to setup request by percentage. After you select how many lines you wish to use then follow the instructions in red. You can then enter the account numbers, Save and Exit
15. Enter in details for the order: **Quantity, Price, U of M (Unit of Measurement), Item, Item Description and Account Number.** The Account Number can be added in using the Account Number or Account Description
16. **Special Order Handling Instruction:** Information to be relayed to Vendor
17. **Internal Notes:** Information to be relayed between users, related to the requisition
18. **4.** "Save and continue" to enter in additional entries for this request or any delivery or internal notes. **Allows you to enter more info at a later date** If you are totally done with this PO, use **Save & Exit.**
19. **5.** "Save and Exit" once the request has been completed
20. **or** "Return without saving" use this option if you are an approver viewing the request without making any changes.

1 Order For: High School | 400 Order From: SCHOLASTIC INC. (2931 E. MCCARTY STREET) | 00181 2931 E. MCCARTY STREET PO BOX 3729 JEFFERSON CITY MO 65102-3729  
 Request is for the Current Fiscal Year. PO# (Optional): PO Date (optional):

2 Ship to Information: Request Number: 000005435 Dated: 4/12/2020 Group: HIGH SCHOOL  
 Location: (Enter Name) Required By: Promised By:  Authorize on Save  Show Budget  
 Staff Member: High School Ship Via:  Retain Account Number  
 Address: 1234 Main St Phone#: (370) 335-9999  Mass Change Account Number  
 City State Zip: Breckenridge CO 80424 Processing History: 574 - ANDERSON, ALEANA G. @ 4/12/2020 3:04:36 PM Level:8  Account Title Sequence in Account Drop Down. Display First: 20 Accounts  
 Attach a Document to Request  
 Delete / Cancel Entire Request

3 Standard Copy Old PO Requests % Distribution Save & Total Request Request is Complete Request is Complete  
 Add a Line Save and Continue Save and Exit Return Without Saving

Qty	Price	Total	U of M	Item	Item Description	Account Number
5	129	\$645.00	each	1254abc	Books	10.381.11.0500.0610.000.0000 ?
0	0.0000	\$0.00				? ?
		\$645.00				

Special Order Handling Instructions:

Internal Notes:

**NOTE: Entering in Next Year PO's with a July date:**

After selecting "Order For" click on PO# Optional and the program will assign a PO number and will fill in the date of entry. Change that date to a July date and then complete the request, Authorize on Save and then select Save and Exit. The PO will then print with the July date. The date of the request goes back to the entry date, but the PO will still have the July date.

**Purchase Request Authorization**

Once the request has been authorized by all approvers a purchase order number will be assigned and it will be printed in the District Office. Please send the invoice or any paperwork to the District Office. The PO will be returned to originator to place the order.