

## Open Purchase Order Example (Items)

1. Select Entering Purchasing Requisitions – POUPPR
  2. Make sure you are in Add Mode
  3. Select vendor
    - a. You can type the vendor # if you know it
    - b. You can look up the vendor using the blue ellipsis (three dot button)
    - c. You can look up using the keyboard (CTRL + L)
- NOTE: \* is the wildcard**
- Example: \*south\* shows all results that have “south” somewhere in the name (beginning, middle or end)  
South\* shows results that have “south” at the beginning of the name only
4. Select the vendor by double clicking on the name or highlighting the option you want and clicking “OK”
  5. Click the Ship tab to verify that the site shows your site. You can specify a location at your site (eg Athletics, Library, etc) in the End Use field
  6. Click the Dates tab if there is a specific date that you need the order by (eg deliver by 06/30, etc)
  
  7. In the Items tab, select the appropriate account code
    - a. You can type the account code if you know it
    - b. You can look up the account number using the blue ellipsis (three dot button)
    - c. You can look up using the keyboard (CTRL + M)
  8. Select the account code you want to use by double clicking on the line or highlighting and clicking “OK”
  9. If you want to split the account codes, use the pie icon
    - a. You can split by amount or percentage
- Note: the system does the math for you so it will always equal the full amount or 100%!**
10. Item Number: This should be sequential – 1, 2, 3, 4, 5, etc
  11. Quantity: LOT
  12. Units: LT
  13. Description: Open Purchase Order for \_\_\_\_\_ (eg Classroom & Office Supplies, HVAC parts and supplies, Bus parts and supplies, etc)
  14. Unit Price: Total Open PO amount
  15. Tax Code: Change to “<none>” (the default is the current tax rate – 7.75%)
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16. Under the Notes tab, you must include the following information:
    - a. **PR Notes** (Internal messages to CUSD staff that do not show on the PO)
      - i. Example: For student (full name of student – first and last name) IEP dated \_\_\_\_\_; need by \_\_\_\_\_ (date) per agreement
    - b. **Print Before** (instructions that show on the PO before the item description)
    - c. **Print After** (instructions that show on the PO after the item description) - **MANDATORY**
      - i. Term: dates of open PO (eg 07/01/2017 – 06/30/2018, 07/01/2017 – 12/31/2017, etc)
      - ii. Authorized to purchase: list everyone!

After you have entered all the information, you must save your PR by pressing “enter” on the keyboard while in the Items tab. Make sure you get the green “Record Accepted” message. Then submit through workflow to send to the next level approver.