

Purchase Order Example (Conferences)

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 pressing “OK”
5. Click the Ship tab to verify the shipping site info. Please put your site information as the ship to.
6. Click the Dates tab if there is a specific date that you need the order by for early registration discounts, etc (eg process by 06/30, etc). Please be sure to make a note in the PR note section as well.
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 pressing enter
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: number of attendee(s)
12. Units: EA
13. Description: Title of Conference – Name of the Conference. Please be sure to include the section/category/subject that the attendee is going to.
14. Unit Price: Amount of each registration. If a price increase is near please put higher price.
15. Tax Code: Change to “<none>” (the default is the current tax rate – 7.75%)

NOTE: If attendees are going on different dates or locations, please indicate on separate line items and in the PR Notes

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: Need by date for early registration discount.
 - 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. Date(s) of Conference
 - ii. Location (Example: OCDE – 200 Kalmus Drive, Costa Mesa, CA or Virtual)

- iii. Attendee(s)
 - iv. Pre-registration confirmation number (if applicable)
17. Please be sure to register prior to submitting your Purchase Requisition (PR). This will help to not only reserve a seat for the attendee(s) while there is space, but will also likely save any type of early bird discount. If you are unable to register please fill out the form as much as you can and include that information in the back-up. Purchasing will need it and this will help expedite the process. While filling out the registration information please follow the below payment instructions. Please include the registration confirmation with the back-up.
- i. Purchase Order: Please select Purchase Order (PO) if the vendor will accept one as the payment type. If you are filling out an on-line form please see the following for possible scenarios:
 - A. If you are able to **complete** registration by selecting PO as your payment option and receive a notice once done to send a copy of the PO at a later date, please note that on the PR.
 - B. If the vendor only needs the PO number and not a physical copy of the PO at the time of registration, please use the PR number.
 - C. If the vendor needs a copy of the PO while you are filling out the online form in order to complete registration or move forward, then select check as the payment option. Please be sure to include that information on the PR.
 - ii. Check – if the vendor accepts a check as payment please register the attendee(s) and select this option. If Purchase Order and check are both available options, please select Purchase Order unless a check is needed prior to the vent. Please note that check has been selected in the PR notes.
 - iii. Credit Card – If the vendor will **only** accept a credit card or space is limited and a purchase order/check will not reserve the seat then a credit card will be needed. Please fill out the registration information as far as you can and send a copy to Purchasing via the back-up. If it is on-line please take a screenshot and include with the back-up. This will help to ensure that the PR doesn't get placed on hold while that information is being obtained.

*** Attachments – MANDATORY

- RTA (all signatures and proper budget code signed by Budget)
- Conference information/printout (price, date, location, host, title, etc.)
- Registration confirmation or a filled out registration form.

After you have entered all information, you must save your PR by hitting “Enter” on the keyboard to get the “Record Accepted” message. Then submit through workflow to send to the next level approver.