

Purchase Order Processing

(AKA: Request for Purchase Entry and Changes)

Entering in a Requisition (Purchase Order)

1. Select "Purchasing"
2. Select "Request for Purchase entry and Changes"
3. Use Vendor Search field to find needed Vendor
 - At this time, new vendors must be added by someone in the Business Office, please email Cheryl Masnova @ cmasnova@antioch34.com with vendor information

4. Select "New Request"

5. Enter the details of the order in the new window
 - a. Order for (1) – will be your school
 - b. Ship to Info (2) – add your name to the location line
 - c. Enter the order details (3) including quantity, price, unit of measure (if known & item number (if known), item description & account number.
 - d. Special Order Handling Instructions – information that will be printed on the approved purchase order for the Vendor to see (example: quote number).
 - e. Internal Notes – information that will NOT print on the approved purchase order, this area is used to give the approver (i.e. Principal & CFO) add'l info about the order.
 - f. Detail Area Entry Options -> Attach a Document to Request – ALWAYS attach a document to better inform the approver of order details. Items to attach include:
 - copy of quote
 - screenshot of cart (example: Amazon)
 - copy of receipt for reimbursement (example: supply receipt or cell phone bill)
 - copy of mileage log or Google map

1 Order For: ADMINISTRATIVE SERVICES CENTER | 9 | **Order From:** AMAZON {P.O. BOX 530958} | 02130 | P.O. BOX 530958 ATLANTA GA 30353-0958
 Request is for the Current Fiscal Year. **PO# (Optional):** **PO Date (optional):**

2 Ship to Information: **Request Number:** 0000013462 **Dated:** 12/13/2017 **Group:** Admin | **Detail Area Entry Options:**

Location: ASC	Required By: <input type="text"/>	Promised By: <input type="text"/>	<input type="checkbox"/> Authorize on Save	<input type="checkbox"/> Show Budget
Staff Member: ADMINISTRATIVE SERVICES CENTER	Ship Via: <input type="text"/>		<input type="checkbox"/> Retain Account Number	
Address: 964 SPAFFORD ST.	Phone#: 847-838-8401		<input type="checkbox"/> Mass Change Account Number	
City State Zip: ANTIOCH IL 60002	Processing History: cmasnova - cheryl @ 12/13/2017 12:35:49 PM Level:9		<input type="checkbox"/> Account Title Sequence in Account Drop Down. Display	
			<input type="checkbox"/> Attach a Document to Request	
			<input checked="" type="checkbox"/> Delete / Cancel Entire Request	

3 Standard Copy Old PO Requests % Distribution **4 Save & Total Request** **5 Request is Complete** **or Request is Complete**

X	✓	Qty	Price	Total	U of M	Item	Item Description	Account Number
<input type="checkbox"/>	<input type="checkbox"/>	0	0.0000	\$0.00				
				\$0.00				

Special Order Handling Instructions:

Internal Notes:

6. Select “Save and Exit” once the request has been completed.

Purchase Request Authorization

Once the request has been authorized by all approvers (i.e. Principal & CFO) a purchase order number will be assigned and it can be printed.

Note: If a change is made to the request (i.e. amount, account number, etc.) before it has been finalized, it will become unauthorized. All of the approvers will need to re-authorize the order again.

While waiting for the PO to be approved, the status of the order can be viewed by following the steps below:

- Look & Browse -> Finance Look & Browse -> Vendor tab -> type the Vendor in the “Vendor Name” field & click search -> Purchase Order Tab -> then toggle on the “Show Approval History”

The screenshot shows the 'ANTIOCH C.C. DIST. #34 Finance Look and Browse' application. The user is logged in as 'cheryl'. The interface includes a navigation menu on the left with options like 'Financial Office', 'Look and Browse', 'Employee Information', etc. The main area is divided into tabs: 'Accounts Payable', 'Purchase Orders', and 'Documents'. The 'Purchase Orders' tab is active, displaying a table of purchase orders. The 'Show Approval History' checkbox is checked, revealing approval details for two orders.

Po Num	Acct Num	Description	PO Date	UOM	Qty Est	Unit Price	Orig Amt	Open Est	Bills Recd	Vendor Name	Req Num	Current or Next Year	Approval Hist
0001703058	12762	Retractable Badge Holders	12/12/2017		5	\$7.99	\$39.95	\$39.95	\$0.00	AMAZON	0000013450	C	Needs to Approve: WADSWORTH, CHERYL - 571340 Needs to Approve: GUYTHARP, KRISTINA K. - 31023 Entered by: BRITTO, SUSAN L. - 9939 - Group: Teach & L Approved By: 9939 - BRITTO, SUSAN L. on: 12/13/2017 & Approved By: 571310 - OCEJAS, DANIEL F. on: 12/13/20 Approved By: 74639 - SAKI, ADAM H. on: 12/13/2017 10
0001703047	40605	Espar heater-water pumps	12/11/2017	ea	3	\$158.68	\$476.04	\$476.04	\$0.00	AMAZON	0000013441	C	Needs to Approve: WADSWORTH, CHERYL - 571340 Entered by: GRAHAM, GUSTAV K. - 31614 - Group: TRAF Approved By: 31614 - GRAHAM, GUSTAV K. on: 12/11/17 Approved By: 69852 - RIESENWEBER, CHERYL L. on: 12

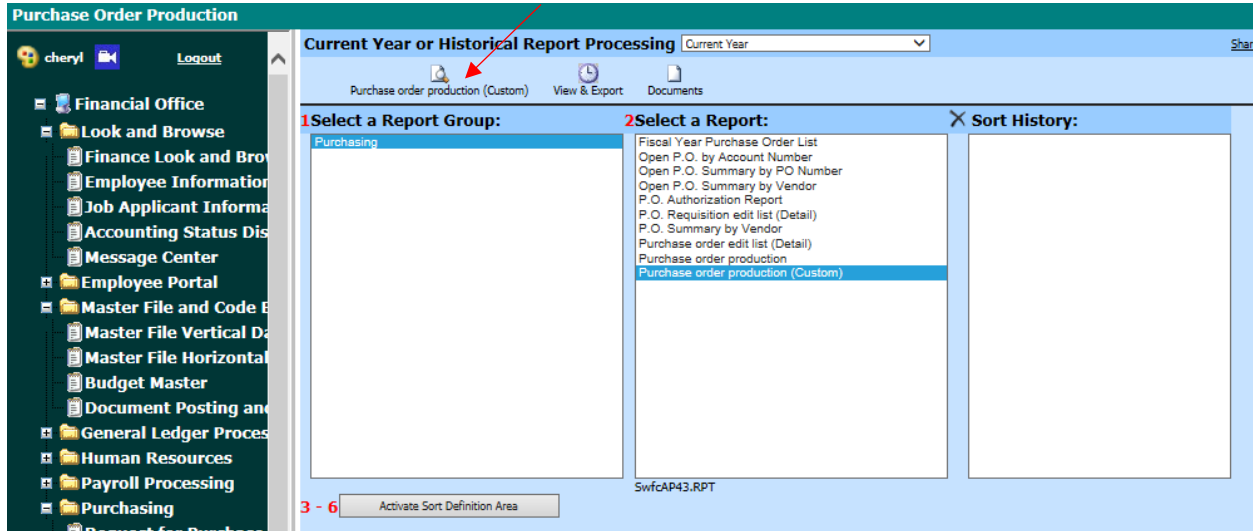
Upon approval, purchase order requestor will receive an email stating their PO has been approved:

The email notification is from Cheryl Masnova (cheryl <cwadsworth@antioch34.com>). The subject is 'Your Purchase Requests'. The body of the email states: 'Your Purchase Requests have been approved. Purchase Order 0001703024 has been approved to AMAZON for your Request #0000013409 in the amount of \$36.91.'

Printing Purchase Orders

Once the approval email is received the PO can be printed.

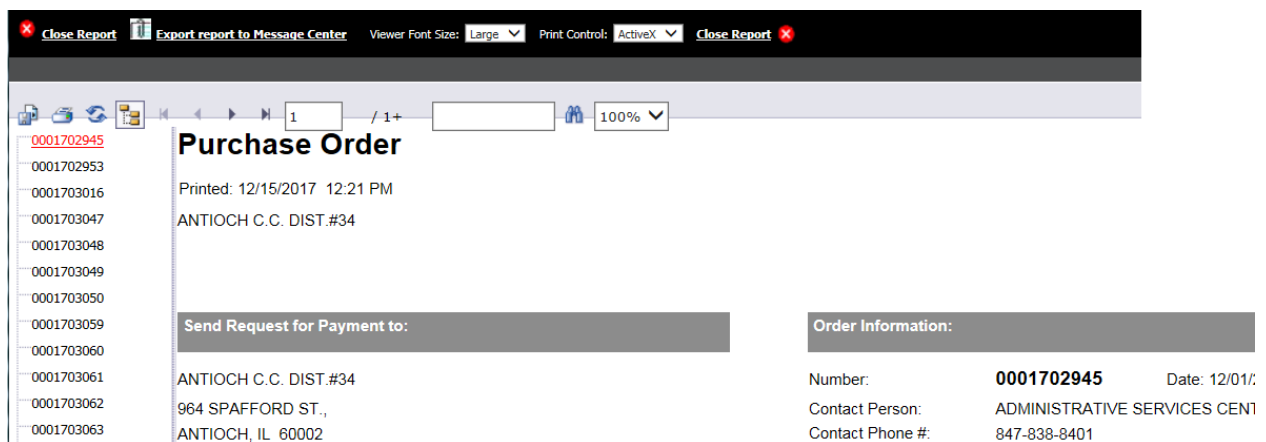
1. Select "Purchasing"
2. Select "Purchase Order Production"
3. Select "Purchase order production (custom)" from the top left corner:




4. A new window/tab will open:


Note: please set your web browser to allow pop-up from

<https://ss19.schooloffice.com/antioch34/sdsweboffice/> to prevent this window from being blocked.





- IMPORTANT:** Select  and then the “Send Now” button. This will send the purchase orders to the Look & Browse area for printing at a later time. If this step is skipped, you will be unable to re-print the purchase order at a later time.

The PO can be printed from this screen by selecting the “Disk/Paper” Icon , select “Adobe Acrobat (PDF)” from the drop down menu, finally select “Ok”.

Note: to view or print a previous purchase order or attachment:

- Look & Browse -> Finance Look & Browse -> Vendor tab -> type the Vendor in the “Vendor Name” field & click search -> Purchase Order Tab -> click on the underlined purchase order number or request number -> a new window will open with the PDF

0000190139	11270	3M Super Sticky Pads, world of rio 3x3"	6/14/2018	1	\$19.99	\$19.99	\$19.99	\$0.00	AMAZON	0000015583	N
------------	-------	---	-----------	---	---------	---------	---------	--------	--------	------------	---

Make Purchase Orders Permanent

Once PO’s have been printed & sent to the Vendor, they need to be posted to the system to move them to the Receiving & Accounts Payables areas.

- Select “Purchasing”
- Select “Make Purchase Orders Permanent”
- Select the correct PO(s): All Purchase Orders will be listed in this screen, please be careful to only make your PO’s permanent.
- Select “Post Selected Ledger”

Vendor Name	Po Number	Account Number	PO Date	Description	Item Number	PO Amount	Request Number	Purchase Order Number
INDEPENDENT STATIONERS INC.		11270	6/11/2019	Total		74.63		
			6/11/2019	AUGS \$75 staff supplies 2019-2020		74.63	0000019358	0000200128

NOTE:

- If you are not sure which PO is yours, click on the binoculars on the left side and the PO detail will be displayed on the bottom of the screen.

2. "Notify Requestor via E-Mail" – If this option is selected a PDF copy of the PO will be emailed to you once the "Post Selected Ledger" is clicked. This is very helpful when entering employee reimbursements because the Business Office uses the PO as an invoice to pay the employee. Just forward the email to cmasnova@antioch34.com for payment processing.

Receiving Purchase Orders

Each purchase order must be "received" in order to indicate to Business Office that the item has been actually received and is ready for payment.

1. Select "Purchasing"
2. Select "Record Received Merchandise"
3. Select Vendor from the search box and click the correct PO (note: this screen looks VERY similar to the original "Request for Purchase Entry")

Select	PO Number	Date	Request Number	Total	Fis
View/Edit	0001703058	12/12/2017	0000013450	\$39.95	C
View/Edit	0001703045	12/08/2017	0000013434	\$154.99	C

4. Enter the Received information

- If order is received in full, select **PO Received in Full** for all quantities to be recorded
- Enter your name on the first line and select "Save and Return"
- If an order is incomplete, enter the quantities received on the corresponding lines, enter "P" for partial in the code area and select "Save and Return" to exit the screen

Received Qty	Received Code	Received Date	Received By Name	Qty	Price	Total	U of M	Item	Description
3	F	12/15/2017	Cheryl Masnov	3	5.8	17.4	6/pack	R330-AN	Post-it Pop-up Notes, 3 x 3
1	F	12/15/2017	Cheryl Masnov	1	19.51	19.51	50/box	75560	Smead Jackets, letter size, 2 in expansion

Received Qty	Received Code	Received Date	Received By Name	Qty	Price	Total	U of M	Item	Description
2	P	12/15/2017	Cheryl Masnov	3	5.8	17.4	6/pack	R330-AN	Post-it Pop-up Notes, 3 x 3
1	F	12/15/2017	Cheryl Masnov	1	19.51	19.51	50/box	75560	Smead Jackets, letter size, 2 in expansion