

# 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](mailto:cmasnova@antioch34.com) with vendor information

**Request for Purchase Entry and Changes**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Vendor Search  or PO#

Find Vendor Add Vendor

Vendor(s)

Address:

Phone Fax E-mail

Purchase Request Reports

Display Vendor Quick Pick List

Display Vendor History

4. Select "New Request"

**Vendors (top 50 are listed)**

AMAZON

**Request for Purchase Entry and Changes**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Vendor Search amazon or PO#

Find Vendor Add Vendor

Vendor(s) AMAZON (P.O. BOX 530958) | 02130

Address: P.O. BOX 530958  
ATLANTA, GA 30353-0958

Phone Fax E-mail

Purchase Request Reports

Display Vendor Quick Pick List

Display Vendor History

3 Request and Purchase Order History:

Show Printed POs

**New Request**

Current Fiscal Year

Next Fiscal Year

5. Enter the details of the order in the new window
  - a. Order for – will be your school
  - b. Ship to Info – add your name to the location line
  - c. Enter the order details – 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  
Request is for the Current Fiscal Year.

Order From: AMAZON (P.O. BOX 530958) | 02130 P.O. BOX 530958 ATLANTA GA 30353-0958

PO# (Optional): PO Date (optional)

2 Ship to Information: Request Number: 0000013462 Dated: 12/13/2017 Group: Admin

Location: ASC  
Staff Member: ADMINISTRATIVE SERVICES CENTER  
Address: 964 SPAFFORD ST.  
City State Zip: ANTIOCH IL 60002

Required By: Promised By:  
Ship Via:  
Phone#: 847-838-8401  
Processing History: cmasnova - cheryl @ 12/13/2017 12:35:49 PM Level:9

Detail Area Entry Options:  
 Authorize on Save  Show Budget  
 Retain Account Number  
 Mass Change Account Number  
 Account Title Sequence in Account Drop Down. Display  
 Attach a Document to Request  
 Delete / Cancel Entire Request

3  Standard  Copy Old PO Requests  % Distribution 4 Save & Total Request 5 Request is Complete or 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
0	0.0000	\$0.00				?
		\$0.00				

Special Order Handling Instructions:

Internal Notes:

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

Tips for saving a PO:

4 Save & Total Request 5 Request is Complete or Request is Complete

Save and Continue Save and Exit Return Without Saving

Here is the difference between the above buttons:

**Save & Continue:** Use this if your PO is not complete and you don't want it to go to your supervisor for approval yet.

**Save & Exit:** Use this when the PO is complete & ready for approval or if you made a change. This will start the whole approval process over again.

**Return without Saving:** Use this when you are just viewing the request and are NOT making any changes.

## 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.

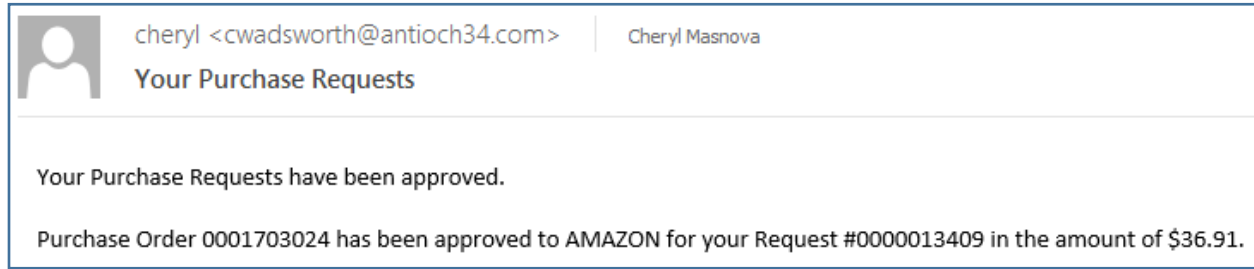
While waiting for the PO to be approved, the status of the order can be viewed by following the steps below:

- 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"

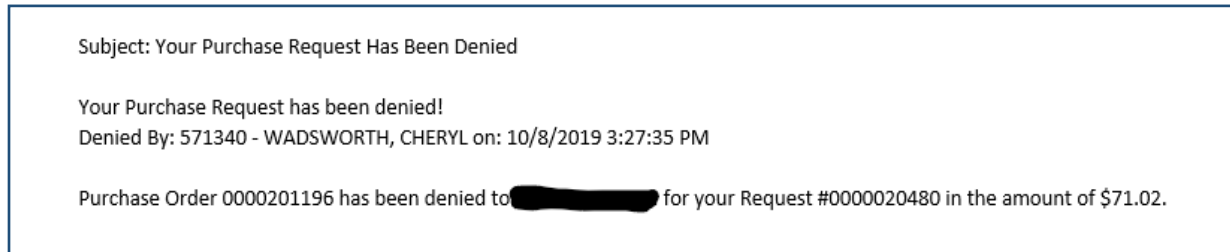
The screenshot shows the 'Finance Look and Browse' application interface. The top navigation bar includes 'Accounts', 'Vendors', and 'Customers'. The 'Vendors' tab is active, and the search criteria are set to 'Vendor Name' with the value 'amazon'. The 'Purchase Orders' tab is selected, and the 'Show Approval History' checkbox is checked. The main display area shows a table of purchase orders with columns for PO Num, Acct Num, Description, PO Date, UOM, Qty, Unit Price, Orig Amnt, Open Enc, Bills Recd, Vendor Name, and Rec Num. Two purchase orders are visible: one for 'Retractable Badge Holders' and another for 'Esper heater water pumps'. The approval history for each order is displayed in a pop-up window, showing the names of the approvers and the dates of their approvals.

PO Num	Acct Num	Description	PO Date	UOM	Qty	Unit Price	Orig Amnt	Open Enc	Bills Recd	Vendor Name	Rec Num	Current of 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: OLIVHARSP, KRISTINA R. - 31023 Entered by: BRITO, SUSAN L. - 9939 - Group:Teach & L Approved By: 9939 - BRITO, SUSAN L. on: 12/13/2017 8 Approved By: 571339 - VOKIAS, DANIEL P. on: 12/12/2017 Approved By: 74839 - SAV, ADAM H. on: 12/13/2017 10
0001703047	40605	Esper 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:TRN Approved By: 31614 - GRAHAM, GUSTAV K. on: 12/11/2017 Approved By: 69852 - ROESENWEBER, CHERYL L. on: 12

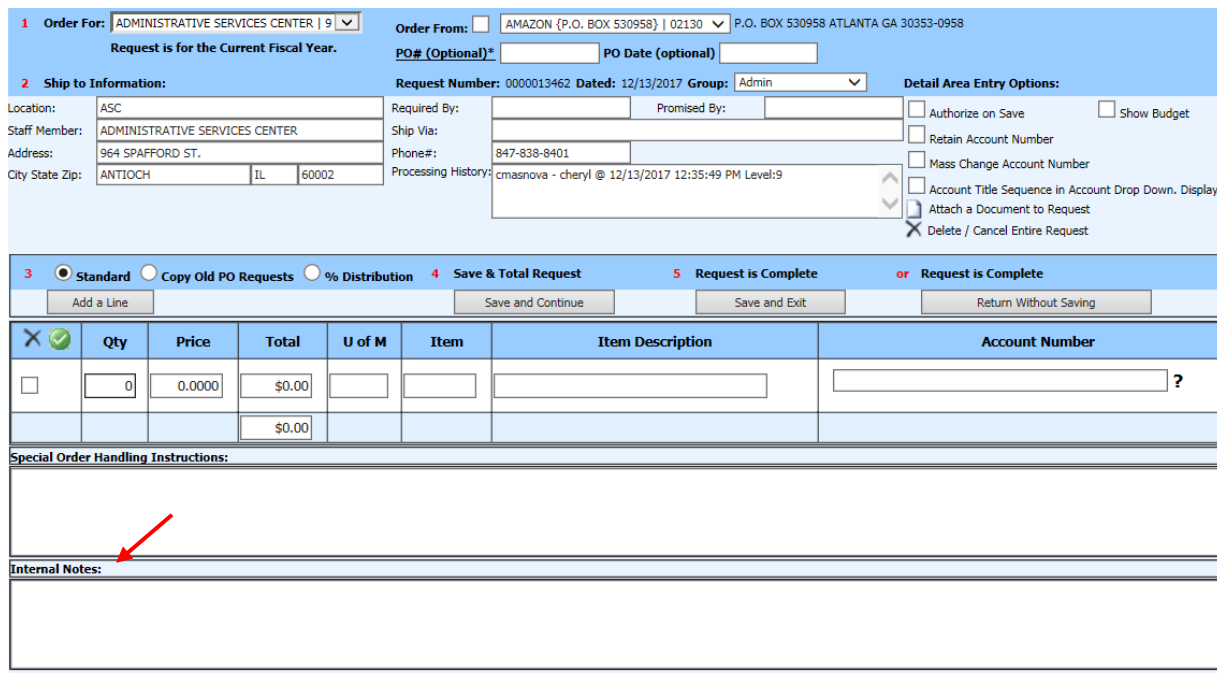
Upon approval, purchase order requestor will receive an email stating their PO has been approved:



If the PO is denied, purchase order requestor will receive the following email:



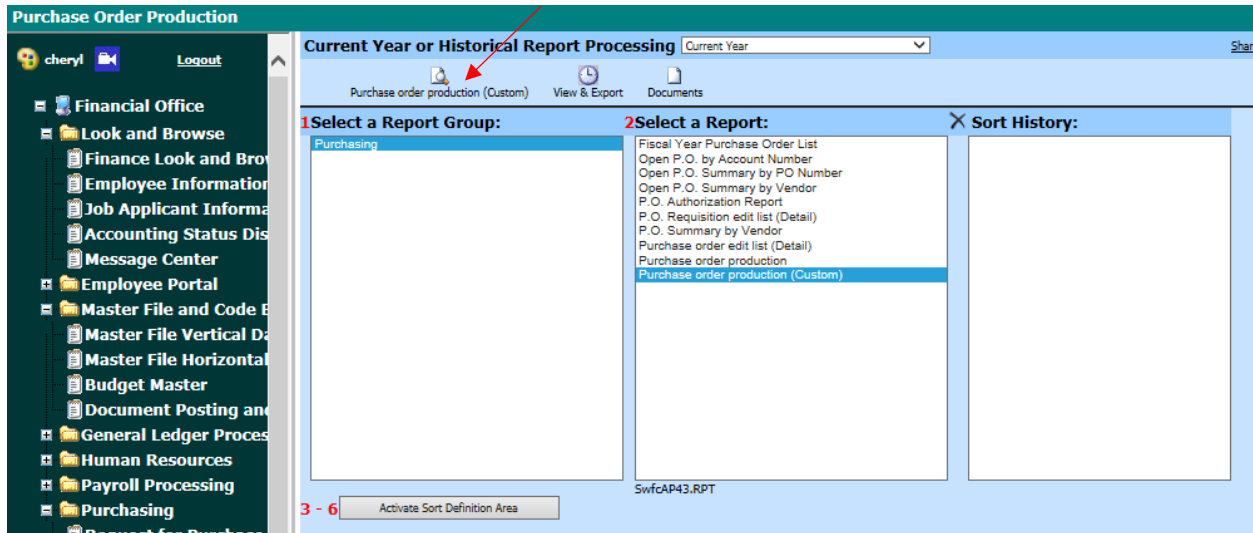
Comments as to why the PO was denied can be found in the internal notes of the purchase order:



## Printing Purchase Orders

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

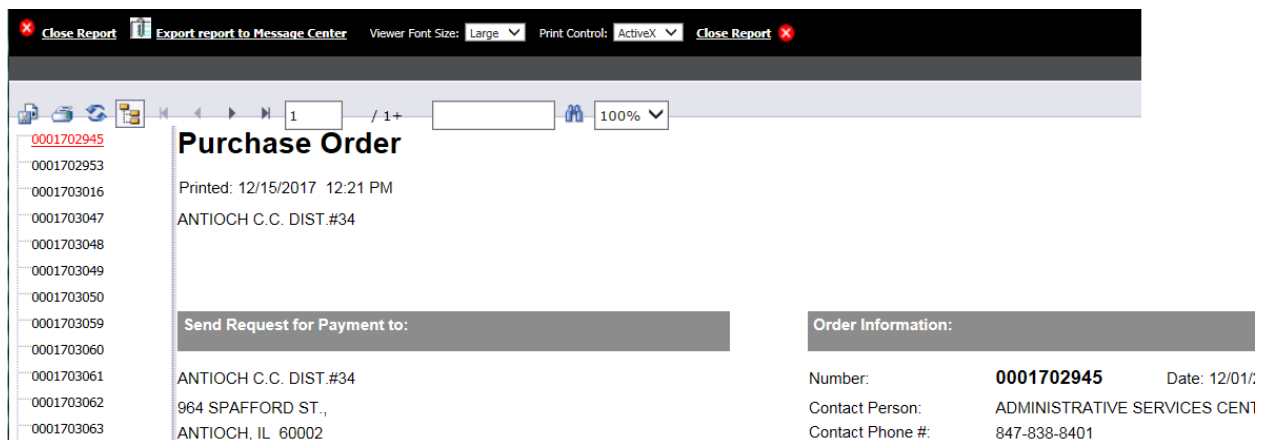
1. Select "Purchasing"
2. Select "Purchase Order Production"
3. Select "Purchase order production (custom)" from the top left corner:




4. A new window/tab will open:


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

<https://ssl9.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
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### 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	AUGS \$75 staff supplies 2019-2020		74.63	0000019358	0000200128
<b>Total</b>						<b>74.63</b>		

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 (with attachment) to [cmasnova@antioch34.com](mailto: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")

The screenshot shows the 'Record Received Merchandise' interface. On the left is a navigation menu with options like 'Financial Office', 'Look and Browse', and 'Employee Information'. The main area is titled 'Request for Purchase Entry and Changes' and includes a vendor search section with a dropdown menu showing 'AMAZON (P.O. BOX 530958) | 02130'. Below this is a table with columns: Select, PO Number, Date, Request\_Number, Total, and Fis. The table contains two rows of data.

Select	PO Number	Date	Request_Number	Total	Fis
<a href="#">View/Edit</a>	0001703058	12/12/2017	0000013450	\$39.95	C
<a href="#">View/Edit</a>	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

This screenshot shows the 'PO Received in Full' form. It includes fields for 'Received Code' (F), 'Received Date' (12/15/2017), and 'Received by Name' (Cheryl Masnova). Below these is a table with columns: Received Qty, Received Code, Received Date, Received By Name, Qty, Price, Total, U of M, Item, and Description.

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

This screenshot shows the 'PO Received in Full' form with a partial quantity. The 'Received Code' is F, 'Received Date' is 12/15/2017, and 'Received by Name' is Cheryl Masnova. The table below shows two rows of received items.

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