How to Create a Purchase Requisition

Note: Everything should be typed using upper case

1. To create a requisition, begin by clicking on Create Purchase Requests in your Purchasing Tab. Be sure your source document provides a budget number, ship-to address and any special notes.

2. Click on the ‘+’ icon at the top of the screen to bring up a blank requisition.
3. The system will automatically number your requisition once you have saved the record by hitting Enter. Write you requisition number on your source document.

4. Under the Vendor Tab, enter the Vendor number or look up the vendor number by clicking on Lookup (Ctrl+L). (See instructions for Vendor Lookup.)
5. Click on the **Ship To** tab to bring up the “ship to” address field. **SLL** (LL – location code) will ship directly to the location and is used for most purchases. **S95LL** (LL – location code) indicates items will be shipped to the warehouse and then delivered to your location.

Type in the code for your location (S19 for Frank Love).
6. Moving across the tabs at the top of the screen, the **Requested Tab** and **Date tab** will auto fill as you move across to the **Details tab**. In the **End Use Field** under the **Details tab**, type in the **location/budget authority/person or department** receiving the items or service. For ASB purchases you will type ASB/location/budget authority/person or club.
You will use requisition codes (Req Codes) to communicate additional information to purchasing.

7. Continue moving across the top of the tabs and click on **Req Codes Tab** to insert a requisition code. There are 10 boxes and each box has a “pick” menu. You must click on the black arrow next to a requisition code box and choose a code or type the two-letter code into the box. **If you wish to delete a code, you must choose “none” from the pick list.**
8. Click on the **Items Tab** in the middle of the screen to enter your item information. You can either click on each field or tab across to complete your ordering information. Your text will automatically wrap in the **Description Field**.

Make sure to complete the following fields: **Quantity**, **Units (no more than three characters)**, **Description**, **Amount**, **Charge Code** (Tax percentage) if different than the default, and **Account Number**.

**Description**: When entering your item description, be as specific and detailed as possible. Indicate catalogue numbers, item numbers, color preference, registration dates and location, names of people attending, etc.

**Charge Code**: Tax is automatically calculated at 9.5%. For a different tax amount, pick the one you want by clicking on the arrow in the Charge Code box and choosing the correct amount. If you need to delete the tax, click on <none> in the pick menu.

**Account Number**: Please know your account numbers prior to starting your requisitions. Contact Chris Brenegan (X7633) if you’re not sure which one is appropriate.
9. If you have more than one item to order or need to add a line for shipping/handling costs, press Enter on your keyboard once to save the first item and to bring up the fields for another item.

**Shipping and Handling:** Always add a 10% shipping and handling charge as a separate line item unless you know the specific amount for shipping charges. If you don’t have to pay shipping and handling costs, please say so in the Notes section and do not create a shipping and handling line item.

10. Once you’ve saved an item, a green check mark will appear at the top of the screen that says “Record Accepted”. This means your entire requisition has been saved. You can continue to add more items at this point or add Notes, Text or complete your requisition. You **must** save your work again if you have made any changes. To complete your requisition, see the instructions in item 15.
11. **To enter a Note** (internal communication) or **Text** (message to the vendor), click on the **Notes Tab** in the middle of the screen.

12. **Creating an Internal Note**: Make sure that the **PR Notes Tab** is highlighted before typing your requisition notes. This is a text field so you can type your note the same way you would type something in a Word document. Reminder: Anything typed in the **PR Notes Field** will not print on the purchase order and is an internal message, i.e., new vendor address or instructions to the Purchasing Department. Add your initials and the date at the end of your message.

**To Save Your Note**: You must first click on the **Items Tab** or somewhere in the top section of the requisition. Then press Enter on your keyboard once.
13. **Creating a Text Message To Vendor:** Before entering your text message, determine if you want your message to print **before** your items on the purchase order - or **after**. Once you’ve decided, click on the appropriate tab and type your message to the vendor.

**To Save Your Text Message:** You must first click on the **Items Tab** or somewhere in the top section of the requisition. Then press Enter on your keyboard once.
14. If you need to change any of the information in your requisition, you can click on any field to make your change, **but you must press the Enter key again to save any changes you’ve made.** The green check mark will appear at the top of your screen each time you save your record.

15. Once you’ve completed your requisition, click on **Close** at the top right-hand corner of your screen. This will close this requisition.