

LOMPOC UNIFIED SCHOOL DISTRICT
BUSINESS SERVICES DIVISION
PURCHASING DEPARTMENT
Purchasing Instructions

Rev 11-12-2021



PURCHASING GUIDE

This document is provided by the LUSD Purchasing Department and is intended to be used by LUSD personnel authorized to approve and or enter requisitions into the Escape System. **Revisions in green print.**

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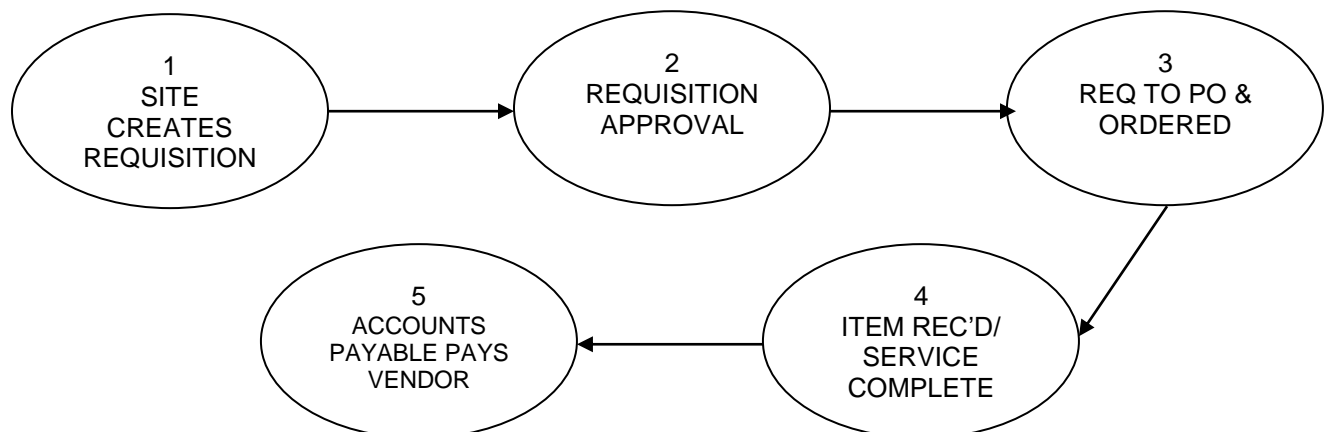
2021-2022 PURCHASING DEADLINE

- **April 1, 2022 (Tentative) – Additional deadlines TBA.**
- **All requisitions using 2021-2022 funds, including supplemental concentration and federal program funds, must be submitted in Escape by this date.**

PURCHASING STAFF

- Purchasing Services is responsible for the District’s Purchasing, Public Works, Print Shop, Stores/Warehouse & Mail Room activities.
- Purchasing Services is located at the Education Center complex on A Street.
- Our hours of operation are 7:30 am to 5:00 pm.
- We are located at 1301 North A Street.
- Our main line is x3290.
- Our fax is (805) 737-1708.
- Our office consists of:
 - x3256 – Angelica Hernandez, Manager of Purchasing Services
 - x3261 – Nilufer Jorgenson, Buyer
 - x3257 – John Metzger, Buyer (WOC)

PURCHASING CYCLE



REQUISITIONS

- Requisitions are used to request goods & services.
- There are 2 types of requisitions:
 - Stores Requisition – Used for pre-purchased items stored & issued from the Warehouse.
 - Due to COVID-19, LUSD increased the PPE supply – See the Warehouse Inventory for more information.
 - Many Warehouse items are available from vendors who deliver directly to the site & offer next day delivery and/or weekly delivery at no cost.
 - Vendor Requisitions – Used to purchase goods & services from vendors.
 - There are four (4) types of Vendor Requisitions.
 - PO With Receiving
 - Used to purchase tangible items that require receiving.
 - School supplies, office supplies, furniture, computers, carpet, etc.
 - PO Without Receiving
 - Used to purchase non-tangible items that do not require receiving.
 - Services, contracts, hotel, conference registration, professional development, etc.
 - Blanket PO
 - Used to purchase items from the same vendor over multiple dates.
 - Can be for a specific amount or an amount not to exceed.
 - Office Depot, Iron Mountain, Aramark, etc.
 - **Cannot be used for Title I purchases**
 - Direct Pay – DO NOT USE
- ~~○ Requisitions for supplies under \$50 will be returned to OPEN status.~~
 - ~~• Contact Purchasing if you have a requisition for supplies under \$50.~~
- ESCAPE is the system used to process requisitions.
 - Requisitioners must be authorized & set up to use Escape.
 - Contact the Fiscal Director to obtain authorization for Escape at Accounting@lUSD.org
 - Contact Accounting for Escape Fiscal training at ext. 3190.
 - Contact Purchasing for Escape Requisition training at ext. 3290.

STANDARD SUPPLY LIST (In Progress)

- Provides information required to enter requisitions in Escape.
- Is used as a guideline to assist with finding common supplies, materials, equipment & services.
- Standard quotes are available for some of the items on the list.
- List provided in Excel or PDF format.
- Is updated & distributed electronically on a regular basis.

STANDARD QUOTES & TEMPLATES (In Progress)

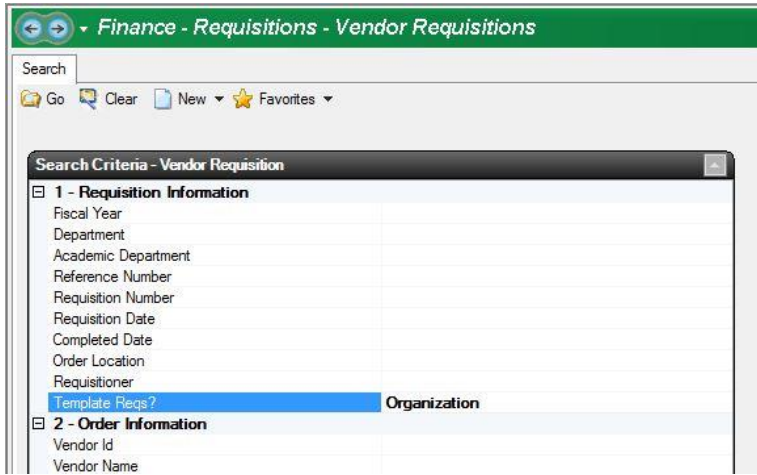
- Standard quotes are available for several items & are set up as Templates in Escape.
- Standard quotes may be used until the vendor notifies us of price changes.
- Standard quotes for technology items are screened & approved by ITS.
- There are three (3) type of Templates.
 - STANDARD QUOTE TEMPLATES
 - All key info from Standard Quotes have been preloaded into the Template for you.
 - You complete/update a few fields, add your budget code, and change the quantities if applicable & submit.
 - You will no longer need to add the quote. Purchasing will add the most recent quote & correct your requisition if needed.
 - These Templates will be updated & attached as the standards change.
 - Examples are computer/AV equipment acquired against government contracts and/or group quotes.
 - Supplies for quotes with no expiration date.
 - PREFERRED VENDOR TEMPLATES
 - Key vendor data has been preloaded into Preferred Vendor templates such as contract numbers, vendor rep info, etc.
 - Instructions for requesting quotes or providing an online shopping carts are provided in the template.
 - Examples are Art, Health, General, Custodial & Technology supplies & equipment.
 - HIGH VISIBILITY TEMPLATES
 - Templates for some of the most difficult/high visibility requisitions have been created to ensure all info is documented properly.
 - Information format is provided as a guide along with instructions.
 - Examples are Contracts, Staff Conference & Student Field Trips, complicated travel, multiple date conferences, etc.

IMPORTANT THINGS TO REMEMBER

- A purchase order must be in place prior to ordering goods and services.
- There can be NO BLANKET POs using **Title I** funds.
- **Do not contact the Warehouse directly**...contact Purchasing & we will assist you.
- Purchasing cannot place orders without a completed & Escape approved requisition.
- Contracted services for \$5,000.00 and over require Board approval prior to a PO.
 - Enter the **Board approval date** on the Requisition tab in the Status Comment field.
 - Attach a copy of the board minutes showing date & vote to approve.
 - Attach a fully executed contract/agreement and exhibits to the requisition.
- **Travel outside of California requires Board approval prior to PO.**
 - Enter the Board approval date on the Requisition tab in the Status Comment field.
 - Include a copy of the board minutes in the Travel Documents.
- Anything that alters or repairs a structure is considered a Public Works project (6000-series object code).
 - **Public Works projects** have a different requisition process & are handled directly by the Purchasing Service Manager.
 - Contact Angelica Hernandez at x3261 or hernandez.angelica@lUSD.org for instructions.
- Never contact a vendor without Purchasing permission except to request a W-9 or quote.
- Email Purchasing for all inquiries regarding requisitions and purchase orders.
 - Provide Requisition # or PO# in the Subject line
- No 3rd party vendors allowed with Amazon orders...must be "Sold by" or "Fulfilled by" by Amazon.
- Limit Amazon requisitions to twenty (20) line items.
- All Amazon questions or concerns related to orders/returns are the responsibility of the originator (person who submitted the order) and must contact Amazon Customer Services at (866) 486-2360.
- **Amazon resources:**
 - See here for the LUSD **Registration Guide**.
 - See here for the updated **FAQ**.
 - See here for the **Amazon Business Informational and Training Session**
 - See here for the **Approval Training Video**
 - See here for **how to assign an approver delegate**. It is important that approvers do this prior to leaving for vacation.

HOW TO CREATE A REQUISITION USING TEMPLATES

1. Access the list of LUSD Organizational Templates
 - Log onto Escape
 - Go to Finance/Requisitions/Vendor Requisitions
 - Select ORGANIZATION from the drop-down menu & click GO.
 - Click on the top of the COMMENT column to sort the templates by description.



2. Scan the COMMENT column, click the line you want to use & click COPY.
 - Proceed as usual entering/changing appropriate fields.
 - Save & Close when you are finished.

Req #	PO #	Order Type	Req Date	Total Amt	Outstanding	Requisitioner	Loc	Comment	Buyer Id	Status	On Hold	Vendor Id	Vendor
TMPL-00019		PO w/o Recei	10/15/2018	0.00	0.00	Ruie Garrica	PRCH	APPLE VPP		Organization T	No	000746	APPLE COMPUTE
TMPL-00026		PO with Rece	10/16/2018	0.00	0.00	Ruie Garrica	PRCH	ART SUPPLY - BLICK		Organization T	No	004238	BLICK ART MATER
TMPL-00028		PO with Rece	10/16/2018	0.00	0.00	Ruie Garrica	LHSS	ART SUPPLY - DISCOUNT SC		Organization T	No	000364	DISCOUNT SCHO
TMPL-00027		PO with Rece	10/16/2018	0.00	0.00	Ruie Garrica	SPED	ART SUPPLY - NASCO		Organization T	No	000485	NASCO MODESTO
TMPL-00024		PO with Rece	10/16/2018	0.00	0.00	Ruie Garrica	PRCH	BOOKS - MACKIN		Organization T	No	003921	MACKIN LIBRARY
TMPL-00025		PO with Rece	10/16/2018	0.00	0.00	Ruie Garrica	PRCH	BOOKS - PERMA BOUND		Organization T	No	000506	PERMA BOUND
TMPL-00033		PO with Rece	11/6/2018	1,018.24	1,018.24	Ruie Garrica	PRCH	CHARGING CART 36 SLOTS		Organization T	No	001471	CDW GOVERNME
TMPL-00030		PO w/o Recei	11/5/2018	0.00	0.00	Ruie Garrica	PRCH	CHARTER BUS		Organization T	No	001287	AMER STAR TRAIL
TMPL-00032		PO with Rece	11/6/2018	256.89	256.89	Ruie Garrica	PRCH	CHROMEBOOK NO TOUCH S		Organization T	No	001471	CDW GOVERNME
TMPL-00031		PO with Rece	11/6/2018	347.40	347.40	Ruie Garrica	PRCH	CHROMEBOOK W/TOUCH SC		Organization T	No	001471	CDW GOVERNME
TMPL-00039		PO with Rece	11/28/2018	1,148.15	1,148.15	Ruie Garrica	PRCH	COMPUTER DESKTOP 1 MON		Organization T	No	001471	CDW GOVERNME
TMPL-00038		PO with Rece	11/28/2018	1,368.57	1,368.57	Ruie Garrica	PRCH	COMPUTER DESKTOP 2 MON		Organization T	No	001471	CDW GOVERNME
TMPL-00029		PO with Rece	10/24/2018	0.00	0.00	Ruie Garrica	PRCH	COMPUTER PARTS		Organization T	No	000850	ASSETGENIE INC
TMPL-00012		PO w/o Recei	10/15/2018	0.00	0.00	Ruie Garrica	PRCH	CONFERENCE PREPAY		Organization T	No	000000	MASTER DUMMY
TMPL-00013		PO w/o Recei	10/15/2018	0.00	0.00	Ruie Garrica	PRCH	CONFERENCE SELF REGIST		Organization T	No	000000	MASTER DUMMY
TMPL-00011		PO w/o Recei	10/15/2018	0.00	0.00	Ruie Garrica	PRCH	CONFERENCE PREPAY		Organization T	No	000000	MASTER DUMMY

HOW TO ENTER A VENDOR REQUISITION

1. Gather info:

- Vendor #
- Items to order.
- Account #
- Attachments scanned into PDF format.
- Log onto Escape
- Go to Finance/Requisitions/Vendor Requisitions
- New/Select Account Department 2021-2022
- Requisition Tab
- Order Location – Your school site
- Delivery Location
 - RCVG – Central Receiving for items received at the Warehouse (type in RCVG if not avail in the drop-down) OR
 - School Location – When you want items received directly to your school site or Non-receivable items such as Travel, Software, Services, etc.
- Room – Room # or last name of person who requested the item(s)
- Comment – Use Chart of Accounts to determine comment, also used to note Rush or Prepay.
- Order Type
 - PO w/Rec – Items that require receiving or verification of completion.
 - PO w/o Rec – Items that do not require receiving or when vendor needs prepayment.
 - Direct Pay – **Do not use** without Purchasing or Accounting permission
- Vendor ID
- Shipping Amount
- Status Comment - Board Date (if applicable)

2. Items Tab/New

- New
- Order Qty
- Order Unit
- Description – Part Number 1st, space, Description Next
- Unit Price
- Taxable
- Message Before – Item #1 Only
 - Places message/info at the top of the requisition/purchase order

- Note to Purchasing - email address of vendor rep, date and number of quote/invoice/order and any important request or info.
 - The quote invoice or estimate information
 - Message After – Please do not use this field.... Use Message Before online item #1.
 - Save & New to enter another item or Save & Close if you have no more items to order.
 - Board approval date (if applicable)
3. Accounts Tab/New
 - Type in the Account #
 - Click new to add another Account #
 4. Attachments Tab/New
 - File to Attach.
 - Scan all your documents into 1 pdf file.
 - Make sure your document is not open when attaching to Escape.
 - If you receive an error, please start over.... Escape will let you proceed, but the attachment will not open.
 - Description – Quote, Contract, Trav Doc, etc.
 - Save & Close.
 - Click New to add another Attachment.
 5. Click Task/Submit
 6. Click Magnifier to Print a Snapshot of your Requisition if required.

TRAVEL REQUISITIONS

GENERAL TRAVEL INFO & RESPONSIBILITIES

- This is a guide to assist employees who travel on behalf of LUSD.
- All travel must be pre-approved using LUSD travel forms:
 - [Travel Form "Conference Request Travel Form" – D0103/ACCT10.02.03 ENG Revised 01/11/18](#)
 - [Trip Request – TR-6 Rev. 8/15](#)
- Levels of pre-approval for travel are as follows:
 - Within County travel – Administrator only
 - Out of County travel – Administrator & District Director
 - Out of State travel – Board approval, Site Administrator & District Director
- The traveler(s) is responsible for organizing the travel:
 - Providing all required travel info such as ways to pay, deadline to pay, etc.
 - Registering online & forwarding confirmation to office
 - Completing manual registration & forwarding to office
 - Booking hotel using personal credit card to hold the reservation & forwarding complete confirmation to office. Confirmation must show:
 - Check in & Check out Dates.
 - Hotel Name, Address & Phone #
 - Reservation/Confirmation #
 - Total cost including parking, taxes & fees...manually calculated & noted on document.
 - Obtaining estimate for airfare:
 - Contact Vendor #000392 Your Travel Center at 805-880-2978 or kathyerb@ytc.com
 - Request estimate for travel & forward to office
 - Book flight after receipt of PO
 - Book rental vehicle:
 - Contact Vendor #000379 Enterprise at 805-735-4147 OR www.enterprise.com
 - Book a rental car.
 - Use Corporate Acct #DB30N33 & Billing #17013071
 - Forward confirmation to office
 - The traveler is responsible for cancelling all travel if necessary & forwarding cancellation documents to office.
- Office is responsible for:
 - Completing travel forms & obtaining Administrator signature

- Collecting all registrations &/or confirmations
- Creating preliminary travel package & attaching to Escape
- Entering requisitions for travel
- Contacting approvers for expediting approvals through Escape
- Forwarding cancellation documents to Purchasing
- Purchasing is responsible for:
 - Sending PO and manual registrations to event vendor
 - Sending pre-paycheck to hotel vendors
 - Completing credit card authorization if required
 - Forwarding PO to traveler for final booking of airfare & updating PO with final cost
 - Sending PO to rental car vendor

TRAVEL PACKAGE

- Consists of the following documents in the following order:
 - Travel Form signed by your Administrator.
 - Trip Request signed by your Administrator.
 - Copy of Board minutes page approving Out of State travel (if applicable).
 - Conference/Training Flyer - showing date(s), location, price(s), methods of payment, instructions for payment, deadline to register, contact information, etc.
 - Online registration confirmation OR completed registration form showing total cost including parking, taxes & fees.
 - Hotel registration showing total cost including parking, taxes & fees.
 - Airfare confirmation email from vendor estimating the total cost of airline tickets & fees (if applicable).
 - Rental Car Confirmation showing total cost (if applicable)
- Must be scanned/saved as one PDF document & attached to each requisition in the following order:
 - Travel Form – Signed by Admin
 - Trip Request – Signed by Admin
 - Conference Registration/Confirmation
 - Flyer for Conference showing location, dates & instructions for registration.
 - Hotel registration, flight itinerary, rental car confirmation, etc.
- Original package showing requisition number(s) in upper right of 1st document & should be forwarded to:
 - Debra Ward for screening & additional approvals for resource codes:
 - 0915 – Supplemental Concentration
 - 3010 – Title 1

- 4035 – Title II
- 4203 – Title III
- 4127 – Title IV
- ESSER
- Purchasing for all other codes

INSTRUCTIONS FOR PROCESSING ESCAPE TRAVEL REQUISITIONS

1. Gather all documents for Travel Package.
2. Write the following words at the top left of the Completed Travel Form
 - Conference & Req #
 - Hotel (if applicable) & Req #
 - Airfare (if applicable) & Req #
 - Rental Car (if applicable) & Req #
3. Enter requisitions for each portion of the travel (see attached Travel Cheat Sheets)
4. Write the requisition # at the top of the travel form next to the corresponding word.
5. Scan the entire travel package & save in PDF format.
6. Go back into each requisition & attach the PDF in the Attachment Tab.
7. "Submit" requisitions in Escape.
8. Forward the entire original package, based on the Resource Code above, to:
 - Education Services Attn: Debra Ward. She will:
 - Screen the travel package.
 - Obtain Director & Superintendent signatures if required.
 - Forward the complete package to Purchasing.
 - Purchasing will attach to each requisition as "TRAV DOC FINAL."
 - Purchasing Services Department Attn: Buyer

TRAVEL REQUISITION EXAMPLES

CONFERENCE REGISTRATION

- Wendy White organized the registration for this trip.
- Travelers registered themselves online & forwarded the email confirmations to Wendy.
- The vendor requires a PO by registration deadline.
- Planning started late & Wendy needs to Rush/Expedite this order.
- If request is a RUSH, it is YOUR responsibility to push the requisition through the approval process.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	WHITE (PERSON ORGANIZING THE CONFERENCE)
COMMENT	RUSH*SACS CONFERENCE//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO W/O RECEIVING
VENDOR ID	007442 (AP SEMINARS)
BOARD DATE	05-12-20
ACCT DIST OPT	MANUAL (1 ACCT CODE)
ITEMS TAB	
ORD QTY	3
ORD UNIT	EA
DESCRIPTION	CONFERENCE REGISTRATION – SACS DENVER, CO 07-07-21 TO 07-10-21 SUSIE SMITH CONF #123 MARY MUNOZ CONF #456 WENDY WHITE CONF #789
UNIT PRICE	\$500.00
EXT COST	\$1500.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	DEADLINE TO REGISTER IS 07-01-21; EMAIL PO & REG TO ORDERS@ABC.COM
MESSAGE AFTER	LEAVE BLANK
ACCT #	LEAVE BLANK
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-5200-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	123ABC.PDF
DESCRIPTION	TRAV DOCS – TRAVEL DOC CONSISTS OF: TRAVEL FORM SIGNED BY ADMINISTRATOR (continued on next page) TRIP REQUEST SIGNED BY ADMINISTRATOR ENTIRE CONFERENCE FLYER SHOWING ALL INFO CONFERENCE, HOTEL, AIRFARE & RENTAL CAR CONFIRMATIONS SHOWING CONFIRMATION #S & PRICES.

HOTEL REGISTRATION

- Susie Smith organized the hotel for this trip.
- None of the traveler can pay for the hotel & be reimbursed so a PO will be processed.
- Susie booked thru Expedia & used her personal credit card to HOLD the rooms.
- The vendor requires a check at least 2 weeks prior to arrival.
- Two (2) separate account codes will be used for this purchase, split equally.
- Hotel receipts must be collected & forwarded to Purchasing after travel.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	SMITH (PERSON ORGANIZING THE HOTEL)
COMMENT	PREPAY*SACS CONFERENCE//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO W/O RECEIVING
VENDOR ID	006947 (DENVER MARRIOTT)
BOARD DATE	05-12-20
ACCT DIST OPT	MANUAL (TWO ACCT CODES)
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	HOTEL REGISTRATION FOR SACS CONFERENCE RESERVATION #123ABC & #456DEF DENVER MARRIOTT, DENVER, CO CHECK IN 07-06-21 CHECK OUT 07-10-21 2 ROOMS/2 QUEEN BEDS/4 NIGHTS GUESTS: SUSIE SMITH, MARY MUNOZ & WENDY WHITE
UNIT PRICE	\$1200.00 (MAKE SURE YOU ADD HOTEL TAX, PARKING, ETC.)
EXT COST	\$1200.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	MAIL CHECK TO VENDOR BY 06-14-21 - VENDOR REQUIRES PREPAY WARRANT
MESSAGE AFTER	
ACCT #	LEAVE BLANK
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-5200-XXX-XXXX-XXXX - \$600.00 XX-XXXX-X-XXXX-XXXX-5200-XXX-XXXX-XXXX - \$600.00
AMOUNT	Enter appropriate amounts for each account code entered
ATTACH TAB	
FILE TO ATTACH	123ABC.PDF
DESCRIPTION	TRAV DOCS – USE THE SAME ATTACHMENT FOR HOTEL

AIRFARE

- Mary Munoz organized the airfare for this trip.
- She used a **local travel agency** (YOUR TRAVEL CENTER – VENDOR ID 000392) to find flights.
- Susie departs from LAX; Mary & Wendy depart from SBX.
- This vendor accepts POs & needs the PO # to book the flight.
- Mary will turn in the itinerary to Purchasing so the PO can be revised & sent to the vendor.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	MUNOZ (PERSON ORGANIZING THE AIRFARE)
COMMENT	SACS CONFERENCE//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO W/O RECEIVING
VENDOR ID	000392 (YOUR TRAVEL CENTER)
BOARD DATE	05-12-21
ACCT DIST OPT	MANUAL (ONE ACCT CODE)
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	AIRFARE FOR SACS CONFERENCE SUSIE SMITH ITINERARY # TO BE DETERMINED ROUND TRIP LAX TO DEN DEPART 07-06-21 RETURN 07-10-21 MARY MUNOZ ITINERARY # TBD WENDY WHITE ITINERARY # TBD ROUND TRIP SBX TO DEN DEPART 07-06-21 RETURN 07-10-21
UNIT PRICE	\$2400.00
EXT COST	\$2400.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	NOT TO EXCEED \$2400.00, FORWARD PO TO MARY FOR BOOKING TICKETS EMAIL FINALIZED PO TO KATHY ERB KATHYERB@YTC.COM
MESSAGE AFTER	LEAVE BLANK
ACCT #	LEAVE BLANK
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-5200-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	123ABC.PDF
DESCRIPTION	TRAV DOCS – USE THE SAME ATTACHMENT FOR AIRFARE

RENTAL CAR

- Wendy organized the rental car for this trip.
- She used Enterprise to find a rental car.
- Rental from Denver Airport & Wendy is the primary driver.
- This vendor accepts Purchase Orders.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	WHITE (PERSON ORGANIZING THE RENTAL CAR)
COMMENT	SACS CONFERENCE//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO W/O RECEIVING
VENDOR ID	000379 (ENTERPRISE)
BOARD DATE	05-12-21
ACCT DIST OPT	MANUAL (1 ACCT CODE)
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	RENTAL VEHICLE – CONFIRMATION #ABC123DEF456 DENVER AIRPORT, DENVER, CO PICK-UP DATE 07-06-21 RETURN DATE 07-10-21 DRIVERS – WENDY WHITE, SUSIE SMITH & MARY MUNOZ
UNIT PRICE	\$480.00
EXT COST	\$480.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	CORPORATE ACCOUNT #DB30N33; EMAIL PO & CONFIRMATION TO JULIE.A.LINDBERG@EHI.COM
MESSAGE AFTER	
ACCT #	LEAVE BLANK
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-5200-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	123ABC.PDF
DESCRIPTION	TRAV DOCS – USE THE SAME ATTACHMENT FOR RENTAL CAR

OTHER REQUISITION EXAMPLES

PREPAY WARRANT

- Is a request for an LUSD check to?
 - Vendors who do not accept POs.
 - Vendors who require prepayment of orders/service
 - Vendors who require a deposit
- Invoice, order form or acknowledgement showing total cost of order must be uploaded to Attachment Tab.
- Warrants are requested by LUSD and issued by SBCEO.
- Completed requisitions approved & converted to PO by Friday will result in a warrant delivered to the Ed Center the following Thursday.
- Warrants will be mailed to vendor unless other instructions are given in the description.
- Warrants are available for pick-up in Purchasing by 1:00 pm.

REQUISITION TAB				
ORDER LOC	YOUR SITE LOC			
DELIVERY LOC	YOUR SITE LOC			
ROOM	SMITH (PERSON WHO MADE REQUEST)			
COMMENT	PREPAY* INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET			
ORDER TYPE	PO WITHOUT RECEIVING			
VENDOR ID	XX1234 ANY VENDOR			
BOARD DATE	IF APPLICABLE			
ACCT DIST OPT	MANUAL			
ITEMS TAB				
ITEM #	1	2	3	4
ORD QTY	1	1	1	1
ORD UNIT	EA	EA	EA	EA
DESCRIPTION	1234 Box	2345 Square	3456 Circle	4567 Triangle
UNIT PRICE	\$50.00	\$50.00	\$25.00	\$100.00
EXT COST	\$50.00	\$100.00	\$75.00	\$100.00
TAXABLE	YES	YES	YES	YES
MESSAGE BEFORE ITEM 1 ONLY	VENDOR REQUIRES PRE-PAY WARRANT OR VENDOR REQUIRES DEPOSIT \$___			
MESSAGE AFTER LAST ITEM ONLY	MAIL WARRANT & ORDER FORM TO VENDOR OR CONTACT SUSIE SMITH X1234 FOR PICK-UP			
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX			
AMOUNT	DEFAULTS			
ATTACH TAB				
FILE TO ATTACH	QUOTE 12345 OR INVOICE 12345 OR ORDER FORM 12345			
DESCRIPTION	QUOTE OR INVOICE OR ORDER FORM			

BLANKET PO

- **Cannot be used for Title I purchases**
- Used to encumber & pay recurring utilities, services & supplies.
- Assigned employees order/shop using Blanket PO.
- Employees may not purchase any single item priced \$459.00 or more using a Blanket PO.
- If an item costing \$459.00 or more needs to be purchased, a regular PO must be issued.
- Receiving through the Warehouse is not required.
- Receiving in Escape is not required.
- Forward copy of PO & signed receipts/invoices directly to Purchasing Accounting ~~EXCEPT OFFICE DEPOT BLANKETS:~~
- Forward all blanket PO copies & signed receipts to Accounting
- ~~Forward copy of Office Depot PO & signed receipts to Purchasing~~
- To increase the Blanket PO, email your request to purchasing@lUSD.org. No BPO increases will be accepted after the Purchasing Deadline of April 1st. Please plan accordingly.
- The increase will be made, and the requisition will go back through the approval process.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	SMITH (PRIMARY PERSON USING THE BLANKET)
COMMENT	PAINTING SUPPLIES//SEE COMMENT CHEAT SHEET
ORDER TYPE	BLANKET PO
VENDOR ID	000851 (AIRGAS)
BOARD DATE	NA
ACCT DIST OPT	MANUAL
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	BLANKET PO FOR 2021-2022 SCHOOL YEAR EFFECTIVE 07-01-21 TO 06-30-22 LUSD INTERNAL USE ONLY (if items are picked up by employees): -WRITE BPO # ON RECEIPT(S) -FORWARD RECEIPT(S) TO SITE OFFICE (Site Office may forward Blanket receipts directly to ACCOUNTING or accounting@lUSD.org)
UNIT PRICE	\$459.00
EXT COST	\$459.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	LEAVE BLANK
MESSAGE AFTER	LEAVE BLANK
ACCT #	MANUAL
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	

LUSD PURCHASING INSTRUCTIONS

FILE TO ATTACH	123ABC
DESCRIPTION	QUOTE/PRICE LIST/PREVIOUS INVOICE

NOT-TO-EXCEED REQUISITION – HOME DEPOT

- Used for a ONE-TIME purchase at Lompoc Home Depot up to the amount of the PO.
- Receiving through the Warehouse is not required.
- Shop for your items, take cart and copy of your PO to **PRO Desk** & pay. The name of the person checking out at the PRO Desk must be listed on the PO. ID is required. Use the Purchasing phone number below.
 - Have Customer Service Contact Purchasing directly at 742-3290 if you experience problems checking out.
- Receiving in Escape is required.
- Forward completed PO or Snapshot & receipt to Purchasing.
- Purchasing will update the PO with the correct total cost & forward receipt to Accounting.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	JONES (PERSON DOING THE SHOPPING)
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO WITH RECEIVING
VENDOR ID	004142 (HOME DEPOT-LOMPOC STORE)
BOARD DATE	NA
ACCT DIST OPT	MANUAL
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	<p>NOT TO EXCEED – SUPPLIES FOR AWARDS PROGRAM</p> <p>HOME DEPOT – PLEASE CHARGE #XX SCHOOL NAME (SEE CHARGE CODE CHART BELOW)</p> <p>LUSD INTERNAL USE ONLY: -DO NOT INCLUDE PERSONAL PURCHASES -THIS PO MAY BE USED 1 TIME ONLY -DO NOT SPEND MORE THAN THE AMOUNT ON THE PO -WRITE YOUR NAME, SCHOOL SITE & PO # ON RECEIPT -FORWARD RECEIPT TO SITE OFFICE IMMED AFTER SHOPPING (Site Office forward to PURCH)</p>
UNIT PRICE	\$100.00
EXT COST	\$100.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	LEAVE BLANK
MESSAGE AFTER	LEAVE BLANK
ACCT #	MANUAL
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-4310-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	NA
DESCRIPTION	NA

LUSD PURCHASING INSTRUCTIONS

NOT-TO-EXCEED REQUISITION - ALBERTSONS

- Used for a ONE-TIME purchase at Lompoc ALBERTSON up to the amount of the PO.
- Receiving through the Warehouse is not required.
- Shop for your items, take cart to checkout & tell the checker you are paying with PO.
- Receiving in Escape is required.
- Forward completed PO or Snapshot & receipt(s) to Purchasing.
- Purchasing will update the PO with the correct total cost & forward receipt to Accounting.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	JONES (PERSON DOING THE SHOPPING)
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO WITH RECEIVING
VENDOR ID	001916 (ALBERTSONS)
BOARD DATE	NA
ACCT DIST OPT	MANUAL
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	<p>NOT TO EXCEED – SUPPLIES FOR MEETING</p> <p>LUSD INTERNAL USE ONLY: -DO NOT INCLUDE PERSONAL PURCHASES -THIS PO MAY BE USED 1 TIME ONLY -DO NOT SPEND MORE THAN THE AMOUNT ON THE PO -WRITE YOUR NAME, SCHOOL SITE & PO # ON RECEIPT(S) -FORWARD RECEIPT TO SITE OFFICE IMMED AFTER SHOPPING (Site Office forward to PURCH)</p>
UNIT PRICE	\$100.00
EXT COST	\$100.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	LEAVE BLANK
MESSAGE AFTER	LEAVE BLANK
ACCT #	MANUAL
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-4350-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	NA
DESCRIPTION	NA

NOT-TO-EXCEED REQUISITION – ALL OTHER VENDORS

- Used for a ONE-TIME local purchase up to the amount of the PO.
- Receiving through the Warehouse is not required.
- Receiving in Escape is required.
- Forward completed PO or Snapshot & receipt to Purchasing.
- Purchasing will update the PO with the correct total cost & forward receipt to Accounting.
- Please note that very few local vendors accept purchase orders.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	JONES (PERSON DOING THE SHOPPING)
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET
ORDER TYPE	PO WITH RECEIVING
VENDOR ID	000123 (ANY VENDOR)
BOARD DATE	NA
ACCT DIST OPT	MANUAL
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	NOT TO EXCEED – SUPPLIES FOR AWARDS PROGRAM LUSD INTERNAL USE ONLY: -DO NOT INCLUDE PERSONAL PURCHASES -THIS PO MAY BE USED 1 TIME ONLY -DO NOT SPEND MORE THAN THE AMOUNT ON THE PO -WRITE YOUR NAME, SCHOOL SITE & PO # ON RECEIPT -FORWARD RECEIPT TO SITE OFFICE IMMED AFTER SHOPPING (Site Office forward to PURCH)
UNIT PRICE	\$100.00
EXT COST	\$100.00 (DEFAULTS)
TAXABLE	NO
MESSAGE BEFORE	LEAVE BLANK
MESSAGE AFTER	LEAVE BLANK
ACCT #	MANUAL
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-4310-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	NA
DESCRIPTION	NA

DIRECT PAY REQUISITION

- This order type is rarely used.
- **DO NOT USE WITHOUT PERMISSION FROM ACCOUNTING OR PURCHASING**
- Used to pay unexpected or emergency services or items already received.
- Receiving through the Warehouse is not required.
- Receiving in Escape is not required.
- Forward completed Requisition or Snapshot & receipt/invoice to Accounting.
- No PO is issued.

REQUISITION TAB	
ORDER LOC	YOUR SITE LOC
DELIVERY LOC	YOUR SITE LOC
ROOM	LEMONS (SUPERVISOR OF DEPT)
COMMENT	OUTSIDE REPAIRS//SEE COMMENT CHEAT SHEET
ORDER TYPE	DIRECT PAY
VENDOR ID	005908 (A-Z BUS SALES)
BOARD DATE	NA
ACCT DIST OPT	MANUAL
ITEMS TAB	
ORD QTY	1
ORD UNIT	LOT
DESCRIPTION	EMERGENCY REPAIRS FOR BUS 39 STRANDED ON HWY 1 ON 07-11-21
UNIT PRICE	\$300.00
EXT COST	\$300.00
TAXABLE	NO
MESSAGE BEFORE	INVOICE #1234567 DATED 07-11-21
MESSAGE AFTER	CONFIRMING – INVOICE ATTACHED
ACCT #	MANUAL
ACCOUNTS TAB	
ACCT #	XX-XXXX-X-XXXX-XXXX-5601-XXX-XXXX-XXXX
AMOUNT	DEFAULTS
ATTACH TAB	
FILE TO ATTACH	INV AZ SALES 1234567
DESCRIPTION	INVOICE

LUSD PURCHASING INSTRUCTIONS

BOOK ORDERS

- Enter the list in the vendor’s website as a shopping cart or book list.
- Print a copy of the cart or list & use it to enter the requisition.
- Scan & attach the copy to the Attachment Tab.
- Always enter the titles in Alphabetical order.
- Standard book vendors are:
 - 003695-3 Barnes & Noble –www.bn.com for selection & email crm2054@bn.com for pricing
 - 000819 BMI – www.bmionline.com & request a quote.
 - 000226 Book Source – www.booksources.com, create list & request quote.
 - 008620 Books Are Fun – www.booksarefun.com & create cart.
 - 000210 Bound to Stay Bound – www.btsb.com & create cart.
 - 003921 Mackin – www.mackin.com & create cart.
 - 003236 Scholastic – www.shop.scholastic.com & create & delete cart.

REQUISITION TAB			
ORDER LOC	YOUR SITE LOC		
DELIVERY LOC	RCVG		
ROOM	LIBRARY OR 16 SMITH (ROOM & PERSON WHO REQUESTED ORDER)		
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET		
ORDER TYPE	PO WITH RECEIVING		
VENDOR ID	SEE ABOVE		
BOARD DATE	NA		
ACCT DIST OPT	MANUAL		
ITEMS TAB			
ITEM #	1	2-9	10 OR LAST ITEM
ORD QTY	1	4	1
ORD UNIT	EA	EA	EA
DESCRIPTION	1234567 APPLES IN MY BASKET	992822 BREAD IN MY BOWL	6389572 CATS IN MY BED
UNIT PRICE	\$5.00	\$3.00	\$2.00
EXT COST	\$5.00	\$12.00	\$2.00
TAXABLE	YES	YES	YES
MESSAGE BEFORE	CART #12345 OR LIST #12345	LEAVE BLANK	LEAVE BLANK
MESSAGE AFTER	LEAVE BLANK	LEAVE BLANK	EMAIL PO TO XXXXX
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB			
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX		
AMOUNT	DEFAULTS		
ATTACH TAB			
FILE TO ATTACH	CART #12345 OR LIST #12345		
DESCRIPTION	CART OR BOOK LIST		

LUSD PURCHASING INSTRUCTIONS

MAGAZINE SUBSCRIPTIONS

- Make sure you enter the requisition in the correct School Year.
- You may enter multiple subscriptions on the requisition.
- Order forms or renewal invoices must be uploaded to the Attachments Tab.
- Forward completed copy of PO or snapshot to Purchasing when magazines begin arriving so payment can be made to vendor.
- Standard magazine subscription vendors are:
 - 000074 Scholastic Magazine – Use order form or renewal invoice
 - 000480 Nat'l Geographic School Pub

REQUISITION TAB			
ORDER LOC	YOUR SITE LOC		
DELIVERY LOC	YOUR SITE LOC		
ROOM	SEE BELOW		
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET		
ORDER TYPE	PO WITH RECEIVING		
VENDOR ID	SEE ABOVE		
BOARD DATE	NA		
ACCT DIST OPT	MANUAL		
ITEMS TAB			
ITEM #	1	2-9	10 OR LAST ITEM
ORD QTY	1	1	1
ORD UNIT	LOT	LOT	LOT
DESCRIPTION	1234567 MAGAZINE NAME # OF COPIES TEACHER'S NAME TEACHER'S SUBSCRIPTION ID	1234567 MAGAZINE NAME # OF COPIES SUSIE SMITH SUBSCRIPTION #ABCDEF PER RENEWAL#54321	1234567 MAGAZINE NAME # OF COPIES JOE JONES NEW SUBSCRIPTION PER ATTACH ORDER FORM
UNIT PRICE	\$25.00	\$25.00	\$25.00
EXT COST	\$25.00	\$25.00	\$25.00
TAXABLE	YES	YES	YES
MESSAGE BEFORE	PER ATTACHED RENEWALS AND/OR ORDER FORMS	LEAVE BLANK	EMAIL PO TO XXXXX
MESSAGE AFTER	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB			
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX		
AMOUNT	DEFAULTS		
ATTACH TAB			
FILE TO ATTACH	RENEWAL 12345 OR ORDER FORM 12345		
DESCRIPTION	RENEWAL OR ORDER FORM		

LUSD PURCHASING INSTRUCTIONS

COMPUTER/TECHNOLOGY ITEMS

- Quotes must be uploaded to the Attachments Tab.
 - Use Standard Quotes provided by Purchasing or
 - Request ITS or Purchasing assistance for obtaining a vendor quote.
- ITS must approve all technology purchases.
- Standard technology items/vendors are:
 - 000746 Apple Computer – See Standard Quote email
 - 001471 CDWG – See Standard Quote email
 - 003272 Troxell – See Standard Quote email
- Desktop & laptop computers require imaging by ITS prior to delivery to sites.
- Chrome carts & towers may require an additional requisition for set-up & installation.
- Interactive projectors may require an additional requisition for set-up & installation.
- Enter the vendor P/N 1st, Item Name 2nd & Description Next.

REQUISITION TAB				
ORDER LOC	YOUR SITE LOC			
DELIVERY LOC	RCVG			
ROOM	ITSS (IF IMAGING IS REQUIRED) OR 16 SMITH (ROOM & PERSON WHO REQUESTED)			
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET			
ORDER TYPE	PO WITH RECEIVING			
VENDOR ID	SEE ABOVE			
BOARD DATE	NA			
ACCT DIST OPT	MANUAL			
ITEMS TAB				
ITEM #	1	2	3	4
ORD QTY	1	1	1	1
ORD UNIT	EA	EA	EA	EA
DESCRIPTION	3961998 Chromebook LVO N22.....	3577022 License Google ACAD....	3538796 License Admin GoGuardian...	654809 Recycling Fee 4"
UNIT PRICE	\$189.00	\$25.00	\$4.98	\$3.00
EXT COST	\$189.00	\$25.00	\$4.98	\$3.00
TAXABLE	YES	NO	NO	NO
MESSAGE BEFORE ITEM 1 ONLY	NAT'L IPA TECH SOLUTIONS ED CONTRACT 130733 QUOTE GZJW799 DATED 04-14-20; EMAIL PO TO XXXXX			
MESSAGE AFTER LAST ITEM ONLY				
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #	XX-XXXX-X-XXXX-XXXX-4360-XXX-XXXX-XXXX < \$500 TOTAL COST OF COMPONENT XX-XXXX-X-XXXX-XXXX-4460-XXX-XXXX-XXXX > \$500 TOTAL COST OF COMPONENT			
AMOUNT	DEFAULTS			
ATTACH TAB				
FILES TO ATTACH	QUOTE 12345; PIGGYBACK CONTRACT; BOARD RESOLUTION; BOARD AGENDA/MINS.			
DESCRIPTION	QUOTE; CONTRACT; RESOLUTION; BOARD AGENDA/MINUTES			

LUSD PURCHASING INSTRUCTIONS

FURNITURE

- Ensure you have room to accept delivery of large quantities of furniture.
- We cannot store your orders in the Warehouse.
- Remember to note color selections in the description of each item if applicable.
- Use the sites below to search for furniture or contact the vendor Rep.
- Standard Furniture vendors:
 - 008112 – Office Depot – www.business.officedepot.com – Lee Scott 818-636-7792
ee.scott@officedepot.com
 - 007757 School Specialty – www.schoolspecialty.com – Michael Stump 360-483-4010
michael.stump@schoolspecialty.com
 - 002118 Virco – www.virco.com – Danielle Eidson 310-809-8415 orders@virco.com

REQUISITION TAB				
ORDER LOC	YOUR SITE LOC			
DELIVERY LOC	RCVG			
ROOM	16 SMITH (ROOM & PERSON WHO MADE REQUEST)			
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET			
ORDER TYPE	PO WITH RECEIVING			
VENDOR ID	SEE ABOVE			
BOARD DATE	IF APPLICABLE			
ACCT DIST OPT	MANUAL			
ITEMS TAB				
ITEM #	1	2	3	4
ORD QTY	500	500	50	1
ORD UNIT	EA	EA	EA	EA
DESCRIPTION	1234 Chair 18" Blue, Brushed Alum Legs...	2345 Desk 24" Red	3456 Desk 36" Green	4567 Whiteboard 4' x8', Magnetic, White, Alum Frame, 1" Cork Map Rail & Alum Marker Tray
UNIT PRICE	\$50.00	\$50.00	\$25.00	\$378.00
EXT COST	\$50.00	\$100.00	\$75.00	\$378.00
TAXABLE	YES	YES	YES	YES
MESSAGE BEFORE ITEM 1 ONLY	QUOTE 12345 DATED XX-XX-XX; EMAIL PO & QUOTE TO VENDOR			
MESSAGE AFTER LAST ITEM ONLY				
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX			
AMOUNT	DEFAULTS			
ATTACH TAB				
FILE TO ATTACH	QUOTE 12345			
DESCRIPTION	QUOTE			

DIGITAL PRODUCTS/ONLINE SUBSCRIPTIONS

- Use the example below to enter requisitions where the product is sent via email or accessed online.
- Make sure you select "PO WITH RECEIVING" as the Order Type and
- Send in a completed copy of the PO with email confirmation from vendor.
- Provide email addresses of the people who will access the subscription or
- Provide email address of the person who will manage the subscription for a group.

REQUISITION TAB				
ORDER LOC	YOUR SITE LOC			
DELIVERY LOC	RCVG			
ROOM	16 SMITH (ROOM & PERSON WHO MADE REQUEST)			
COMMENT	INSTRUCTIONAL SUPPLIES//SEE COMMENT CHEAT SHEET			
ORDER TYPE	PO WITH RECEIVING			
VENDOR ID	000123 (ANY VENDOR)			
BOARD DATE	IF APPLICABLE			
ACCT DIST OPT	MANUAL			
ITEMS TAB				
ITEM #	1	2		
ORD QTY	3	1		
ORD UNIT	EA	LOT		
DESCRIPTION	Online Subscription – ABCs & 123s 6 months (07-01-20 to 12-31-20) Forward access codes to: smith.susie@lUSD.org white.wendy@lUSD.org munoz.mary@lUSD.org		Online Service – Homework Mailbox 1 year (07-01-20 to 06-30-21) Forward access code to brown.betty@lUSD.org	
UNIT PRICE	\$200.00	\$5000.00		
EXT COST	\$600.00	\$5000.00		
TAXABLE	NO	NO		
MESSAGE BEFORE ITEM 1 ONLY	QUOTE 12345 DATED XX-XX-XX; EMAIL PO & QUOTE TO VENDOR			
MESSAGE AFTER LAST ITEM ONLY				
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX			
AMOUNT	DEFAULTS			
ATTACH TAB				
FILE TO ATTACH	QUOTE 12345			
DESCRIPTION	QUOTE			

LUSD PURCHASING INSTRUCTIONS

STUDENT FIELD TRIPS

- Trips that require a deposit need two (2) separate requisitions.
 - Deposit – Prepay warrant using the quote.
 - Final Payment – PO without receiving using the Invoice.

REQUISITION TAB				
ORDER LOC	YOUR SITE LOC			
DELIVERY LOC	YOUR SITE LOC OR SCHOOL HOSTING FIELD TRIP			
ROOM	16 SMITH (ROOM & PERSON WHO MADE REQUEST)			
COMMENT	SEE COMMENT CHEAT SHEET			
ORDER TYPE	PO W/O RECEIVING			
VENDOR ID	000123 (ANY VENDOR)			
BOARD DATE	BOARD APPROVAL DATE			
ACCT DIST OPT	MANUAL			
ITEMS TAB				
ITEM #	1		2	
ORD QTY	1		1	
ORD UNIT	LOT		LOT	
DESCRIPTION	Use this for the Deposit. Field Trip Deposit – Quote xxx dated xx-xx-xx Student Field Trip – Cimi Toyon Bay, Catalina Is Crestview Elementary – 6 th Grade 11-13207 to 11-15-20		Use this for the Final Payment. Final Payment Invoice #xxx dated xx-xx-xx Student Field Trip – Cimi Toyon Bay, Catalina Is Crestview Elementary – 6 th Grade 11-13-20 to 11-15-20	
UNIT PRICE	\$600.00		\$5000.00	
EXT COST	\$600.00		\$5000.00	
TAXABLE	NO		NO	
MESSAGE BEFORE ITEM 1 ONLY	QUOTE 12345 DATED XX-XX-XX; EMAIL PO & QUOTE TO VENDOR			
MESSAGE AFTER LAST ITEM ONLY				
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #	XX-XXXX-X-XXXX-XXXX-XXXX-XXX-XXXX-XXXX			
AMOUNT	DEFAULTS			
ATTACH TAB				
FILE TO ATTACH	QUOTE 12345			
DESCRIPTION	QUOTE			

BLANK FORM

- Use this form to assist with gathering info required to enter a requisition.
- This form is for your use only.
- DO NOT forward to Purchasing.

REQUISITION TAB				
ORDER LOC				
DELIVERY LOC				
ROOM				
COMMENT				
ORDER TYPE				
VENDOR ID				
BOARD DATE				
ACCT DIST OPT				
ITEMS TAB				
ITEM #	1	2	3	4
ORD QTY				
ORD UNIT				
DESCRIPTION				
UNIT PRICE				
EXT COST				
TAXABLE				
MESSAGE BEFORE ITEM 1 ONLY				
MESSAGE AFTER LAST ITEM ONLY				
ACCT #	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK	LEAVE BLANK
ACCOUNTS TAB				
ACCT #				
AMOUNT	DEFAULTS			
ATTACH TAB				
FILE TO ATTACH				
DESCRIPTION				

CREATING/SAVING SHOPPING CARTS

- Purchasing has begun creating online accounts to take advantage of online shopping.
 - The vendors, web addresses, User IDs & Passwords are in the Standard Supply List
 - The user ids & passwords should only be used by Escape requisitioners.
 - Account info should only be changed by Purchasing.
- Advantages
 - Requester selects products & sees up to date LUSD pricing.
 - Shipping costs are included if applicable.
 - Correct shipping & billing info is preloaded.
 - Lead time is significantly reduced, often to 1 day delivery for some vendors.
 - Requesters can check the status of their order online.
- Ground Rules
 - Wish Lists, Lists & Save Carts will be referred to as Carts.
 - Never change the Password...contact purchasing@lUSD.org for password change/update.
 - DO NOT change any account info, billing info or shipping info.
 - **DO NOT PLACE ORDERS (EXCEPT AMAZON)**
- Two Types of Online Shopping Carts
 - Create & Save Cart
 - Create & save your shopping cart.
 - Add shipping if applicable.
 - Reference your save cart # on your Escape requisition
 - **DO NOT ORDER (EXCEPT AMAZON)**
 - Create & Delete Cart (Vendor does not allow saving of carts)
 - Create the cart & add shipping if required.
 - Print cart & attach to your Escape requisition.
 - Delete the cart for the next user.
 - **DO NOT ORDER (EXCEPT AMAZON)**

AMAZON UPDATES & RESOURCES

- Only order items "SOLD BY" or "FULFILLED BY" Amazon
- Limit the number of line items per requisition to 20.
 - All Amazon questions or concerns related to orders/returns are the responsibility of the originator (person who submitted the order) and must contact Amazon Customer Services at (866) 486-2360.
 - See [here](#) for the LUSD **Registration Guide**.
 - See [here](#) for the updated **FAQ**.
 - See [here](#) for the **Amazon Business Informational and Training Session**
 - See [here](#) for the **Approval Training Video**
 - See [here](#) for **how to assign an approver delegate**. It is important that approvers do this prior to leaving for vacation.

REQUEST FOR SHIPPING LABEL

- You may use this form to request a shipping label for items you need shipped:
 - To a non-LUSD location and
 - Is not associated with a Purchase Order.
- Complete the form below ensuring you enter a budget code. If a budget code is not provided, the item will not be shipped.
- Place form with the item & leave for the Delivery Driver to return to the Warehouse.

LUSD REQUEST FOR SHIPPING LABEL	
RECIPIENT INFORMATION:	
Company Name	
Street Address (no PO boxes)	
City, State, Zip	
Recipient Name	
Phone #	
Email Address	
REQUESTER INFORMATION:	
School Site or Department	
Name	
Ext	
Email Address	
ITEM INFORMATION:	
Does the item contain liquid?	
Does the item contain batteries?	
BUDGET INFORMATION:	
Budget # to charge shipping costs to	
PURCHASING USE ONLY:	
NUMBER OF BOXES	
DIMENSIONS	
WEIGHT	
CARRIER	
SIGNATURE & DATE	

FREQUENTLY ASKED QUESTIONS (FAQ)

How do I enter a requisition for an item I have already ordered and/or received?

- Enter "Confirming – Already ordered, Order/Confirmation #xxxx dated xx-xx-xx" in the Message Before field of line item #1
- Type = PO W/O Receiving
- Attach Packing Slip in Escape

How do I cancel a requisition or purchase order?

- Email purchasing@lUSD.org with your request & give the reason.
- Provide the requisition # or PO # in the Subject line.
- We will choose the appropriate process for the cancellation, notify all parties involved & reply to your email with confirmation.

How do I increase a Blanket PO?

- Email your request to purchasing@lUSD.org
- We will increase the Blanket PO & submit it for re-approvals.

How do I report a discrepancy to an order I received?

- Email the discrepancy to purchasing@lUSD.org
- Include the PO or Requisition # in the subject line.
- Hold the item at your location & wait for Purchasing's instruction.

How do I expedite or rush a requisition?

- Enter RUSH* as the 1st word of the comment on the Requisition tab.
- Contact all approvers of the requisition & request they expedite approval.

How do I request a prepay check/warrant?

- Enter PREPAY* as the 1st word of the comment on the Requisition tab.
- Attach the invoice, quote or email indicating the total amount of the check on the Attachment tab.
- Enter any notes or instructions in the Description field of the last line item.

How do I request a new vendor?

- Obtain a W-9 from the vendor, vendor's accounting department or website.
- Email the W-9, phone, fax & email address to purchasing@lUSD.org using W9 as the 1st word in the subject line.
- Purchasing will screen the W-9, add the vendor to Escape & notify you of the new vendor # by replying to your email.

How do I attach a document to an Escape requisition?

- Scan & send the document to your email.
- Open & Save As – Save in a folder on your C drive...I call mine Escape Attachments.

- CLOSE THE PDF before you attempt to attach it to the Escape requisition.
- Go to the requisition Attachments Tab.
 - New
 - Click on browse button to right on File to Attach.
 - Browse to the C drive & folder your document is saved in.
 - Highlight the file & Open (if you get an error message, check to see if your PDF is open, close it & re-browse)
 - Enter the type of document you attached (Quote, Travel Docs, etc.)

How do I correct the account code on a requisition?

- Open the requisition.
- Go to Tasks & Return to Open
- Go to the Account Tab & change the account code.
 - If there is no money in the account, you will need to request a budget transfer with Accounting.
- Go to Tasks & Submit
- The requisition will go through the approval process from the beginning.

What do I do if a vendor contacts me & wants to send me a quote or a free product?

- DO NOT AGREE to accepting anything.
- Forward them immediately to Purchasing at x3290.
- Report any aggressive vendor behavior in writing to purchasing@lUSD.org noting the company name, person's name & phone # they called from

How do I get toner for my copier or printer?

- If your device has an IMAGE SOURCE sticker on the front of it
 - Follow the instructions on the sticker to order supplies for your device.
 - Some of the devices will notify IMAGE SOURCE when the toner is low & one will be sent to you.
- If your device does not have an IMAGE SOURCE sticker on it
 - Enter a requisition to purchase a toner or
 - Order the toner on your Office Depot Blanket PO **IF** you set it up for technology supplies.

How do I request corrections, changes, or suggestions to this document?

- Notify by email to purchasing@lUSD.org

How do I return an item purchased on a PO (for Amazon, please see pp. 7 & 31)?

- Make a copy of the PO.
- Write the following on the copy.
 - Short reason for return
 - What you want done.... credit, replace with same item, replace with different item, etc.
 - Sign & date the copy
 - Place with the item & leave for the Delivery Driver to return to the Warehouse.

Report corrections & suggestions to purchasing@lUSD.org

How do I return an item purchased on a BLANKET PO (for Amazon, please see pp. 7 & 31)?

- Contact the vendor rep or their customer service
- Send copies of the return information to Accounting

How do I request an item(s) be shipped to a non-LUSD location?

- Print & complete form on Page 32.

How do I request a repair and/or replacement of an item?

- Contact the vendor to determine status of the warranty. If under warranty, work with the vendor to return the item for warranty repair. If warranty has expired, you may request a quote for the cost to repair the item and submit a requisition for the repair. See instructions for requesting a shipping label to send the item off for repair. Contact Purchasing for assistance, if needed.

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- Log into the LUSD shared account
 - <https://store.agpartseducation.com/customer/account/login/>
 - User Id = purchasing@lUSD.org
 - Password = Lompoc123
- Select the items you need & create a quote.
 - Add items to your cart (you may remove anything that is in the cart from another user)
 - Click on the shopping cart/bag.
 - Click on CREATE QUOTE
 - Enter the following in REMARKS.
 - School Name
 - Email address
 - Any notes to yourself
 - DO NOT CHECK OUT OR PLACE THE ORDER
- Empty your cart & log out.
- Purchasing will email the quote to you...If the quote is acceptable, give the quote to your school office.
- School office enters an Escape requisition (use TMPL-00029)
- Once the requisition is converted to PO & items are received, they will be delivered to your school site.