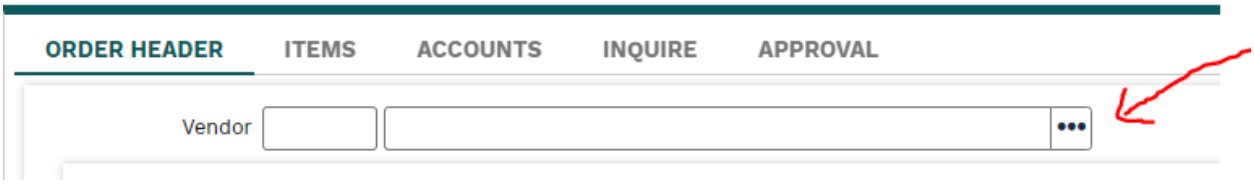
Requesting a General Fund Purchase Order

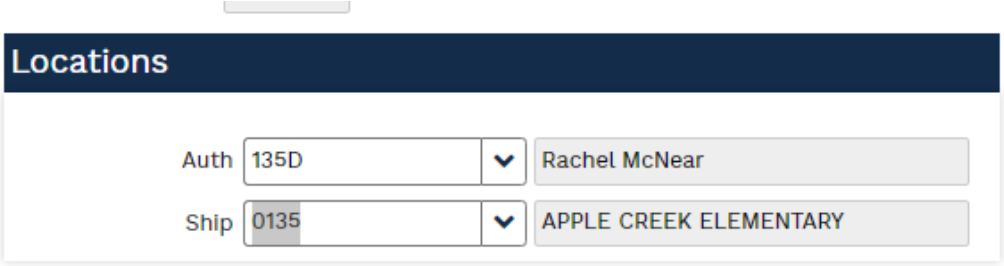
Complete a Request for Purchase form. This form can be found on the Finance website under General Forms.

Entering a Requisition in Linq

Click on your name in the top right side and choose Change Role and Order Entry/App. Click on the three lines on the top left and choose Modules, Order Processing, Requisition Entry/Approval. Click on the Requisition Button and a number will be assigned for you. Write this number down on your Request for Purchase form. Next you can enter the vendor number in the field next to Vendor and hit tab. If you don't know the number, you can click on the three little dots and start typing the vendor's name. Click on the name when you see it and hit enter.




Tab to the Auth field and enter the appropriate code for your principal/approver. Tab to ship and enter the code for your location. (ex. 135D is Rachel McNear and 0135 is Apple Creek)

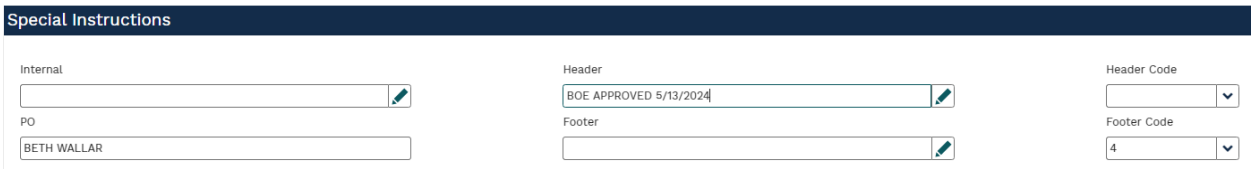



Put your name in the Requestor field. Be sure and use All Caps.

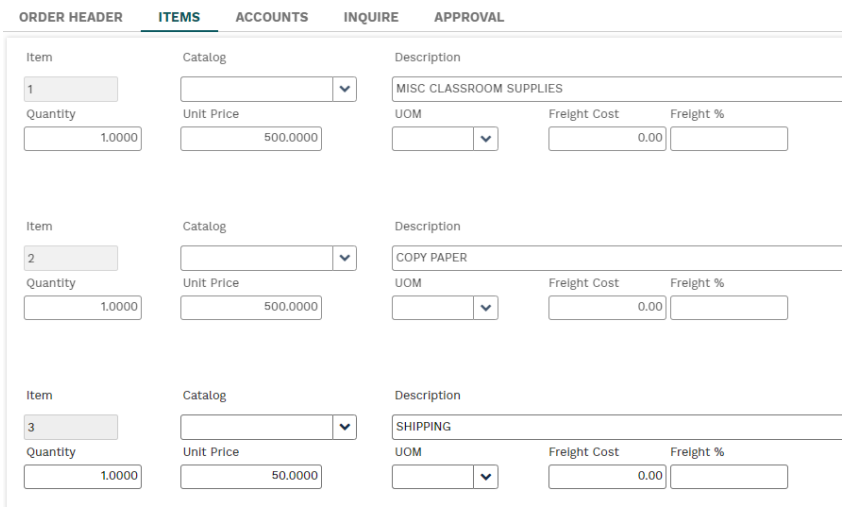
If this is a standing PO you will choose the drop down and select #.


In the special instructions section: Put your name in the PO field. It's not often that you will need to put anything in the Header field but one example of information that goes here is "BOE Approved 5/13/2024" if this requisition is something that required board approval.

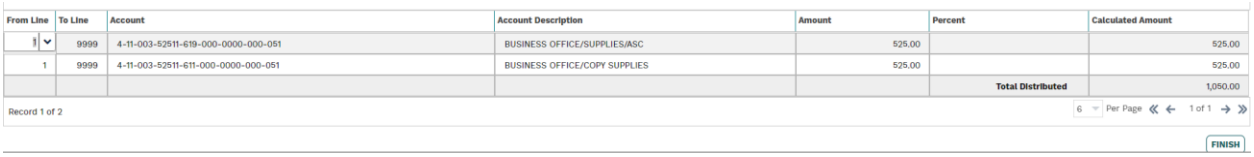
If this is a standing PO, then please choose code #4 in the footer code field.



Next click on the Items tab or hit enter and it will take you to the Items tab. Enter the items you are requesting, the quantity and the unit price. Note: if you need to add freight/shipping costs, please enter them on a separate line and list Shipping as the description, qty of 1, and the total dollar amount. You hit enter after the unit price to get another line. You can hit enter twice after you've entered the last item and it will take you to the Accounts tab.




You will enter the OCAS coding on the Accounts tab. You do not need to change the From Line or To Line. Just leave them as 1 and 9999. Enter the first OCAS code and enter the dollar amount you want coded to it. Hit enter and input the next OCAS code. On the example shown below I have split the shipping cost between the two items. Click the Finish button when you are done entering the OCAS codes.




You will be returned to the first entry screen after you click the finish button. Verify that the Requisition Status shows "Needs Approval by XXX". If this was a site requisition it would show "Needs Approval by P135". This indicates it is ready for principal approval at site 135.


Click on the Print Requisition button to print a copy of what you just entered.

The requisition is now ready for your principal/coordinator approval.

Scan the request for purchase form and any quotes or shopping carts to Cindy Corder. She will attach them for you in Etrieve. She must have these forms before she can approve any requests.