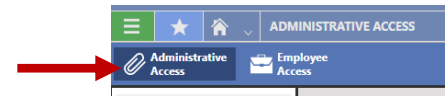




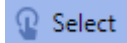
Pflugerville Independent School District – Purchasing User Guide

Enter a PO

Note: User must be in Administrative Access to complete the steps below.



I. Enter a PO

1. Click the menu icon  and select Purchasing > My Purchase Order.
2. Click Add Purchase Order  located on the far right of the screen
3. Enter the required information:
 - **Purchasing Group** – Click dropdown arrow, click the  finger to Select appropriate option
 - **Fiscal Year** – verify the correct year
 - **Blanket- leave blank if Standard PO**
Check **Blanket** if PO will remain open with a defined amount of money
 - **Shop online (not available at this time)**
 - **Vendor** - Start typing name to bring up options, click finger to select desired option
 - **Description** – enter a basic description of the purchase
 - **Batch** – enter the 3 **initials** of the person entering PO and the **date (ABC mm/dd/yyyy)**
 - **Ship To** – use the dropdown arrow to select
 - **Delivery Instructions** – optional, options are predetermined by the Finance office
 - **Attention** – enter a contact name (recommended)
 - **Commodity** – **must** use dropdown and select; if not selected, purchasing will select and it will be sent back to original approver to start the process again
 - **Due Date** – **DO NOT CHANGE**, defaults to today's date
 - **Contract** – Select a matching bid appropriate for the purchase
 - **Ship Date** – **DO NOT Change**
4. Click **Save & Add Detail** - button located at the top left of the screen. The **Purchase Order Detail** screen displays.
5. Enter the required information:
 - **Purchase Order Detail Type** - Leave as **Merchandise**, **Narrative** may be used for just a description
 - **Description** – enter a detailed description of items, can copy and paste
 - **Commodity**- auto-filled from first screen
 - **Quantity** – enter number of boxes
 - **Unit of measure** – Click the dropdown arrow to select appropriate unit of measure
 - **Unit cost** – Enter the cost per unit, do **not** enter dollar sign \$
 - **Entry Amount** – auto calculates
 - **Account** – Start typing account number (Shortcut: in place of “E” type a 5) Select an option.
Note: use the second account field if two accounts are needed to split the purchase
6. Click **Save** or **Save & Add Another**- button found at the top left of the screen

7. Repeat steps 5,6 until all items have been added.
8. Click **Save and Submit unless you have a discount**
9. If there is a discount:
 - Click **Save & Add Another**
 - **Description** – enter dollar amount or percentage of discount (i.e. \$5 or 20%)
 - **Quantity** – enter -1 (minus 1)
 - **Unit of measure** – each
 - **Unit Cost** – enter total amount of discount (ex. 20% discount on \$100 order would be \$20. Enter 20.)
 - Click **Save**** or **Save & Submit**.
10. Add attachment (i.e. quote) –
 - a. From the **My Purchase Order** screen, locate the PO and click the  paperclip beside the PO Request Number.
 - b. Click **Add Attachment** 
 - c. Click **Select Files** to attach the file.
 - d. **Attachment Type** – select **Internal Notes**
 - e. **Comment** – enter comment (i.e. quote)
 - f. Click **Save**.
 - g. Close the attachment window.

If you chose **Save and did not submit, you may submit from the **My Purchase Order** screen: click the dropdown arrow  to view the options. Select **Submit**.

II. View Approvals –

- a. Click the menu icon  and select Purchasing > **My Purchase Order**
- b. **Filter** must be set to “Unsubmitted/Waiting for Approval/Batch”. 
- c. Click the arrow  to view Purchase Order Details, Account Summary, or Approvals. 
- d. Select **Approvals** to see “Waiting for Approval” and “Approval History”.

Important Notes:

1. The request will be given a PO number after it is fully approved.
2. After approvals, the PO will be **batched** by the Purchasing Dept.
3. Purchasing Dept. batching times are **9 a.m.** and **3 p.m.** each workday.
4. The PO will not print with signatures until it has been **batched** and is in **Open** status.