

Creating a Purchase Order Requisition

Objective

This SOP outlines the steps to open a requisition or purchase order for school supplies, ensuring proper approval and record-keeping.

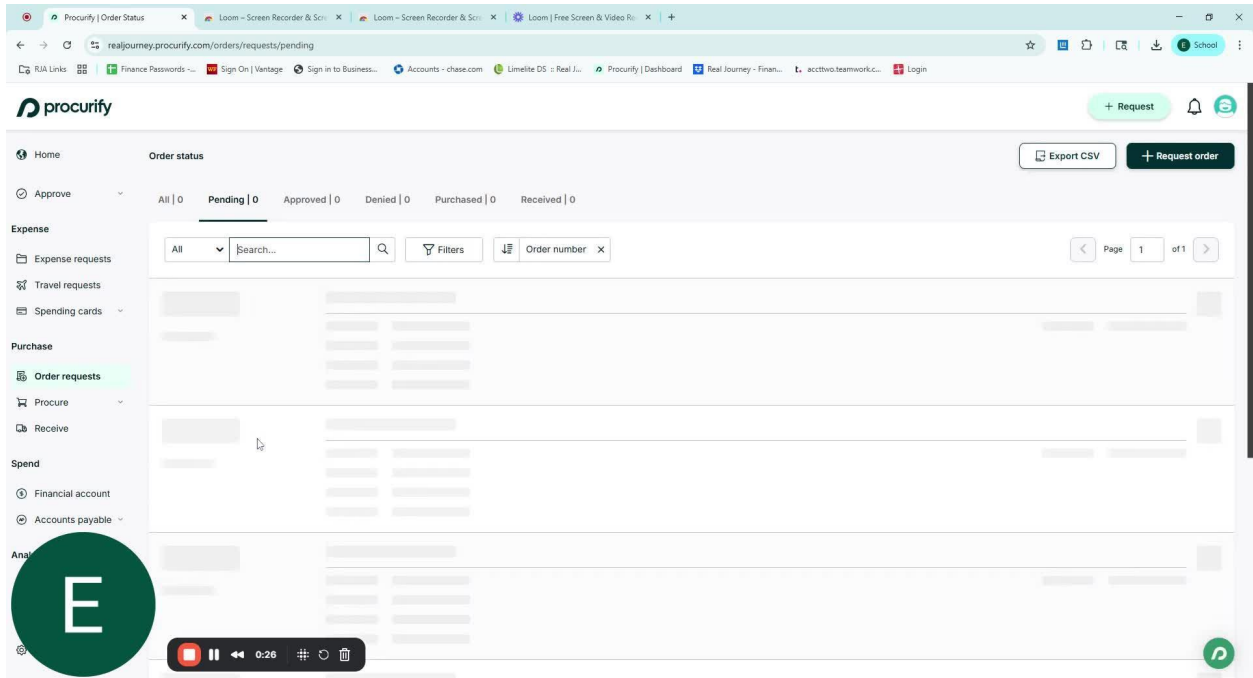
Key Steps

Step 1: Access the Order Request 0:13

The screenshot displays the 'Create order request' page in the Procurify system. The left sidebar contains navigation links for Home, Approve, Expense, Travel requests, Spending cards, Purchase, Order requests, Procure, Receive, Spend, Financial account, Accounts payable, and Analytics. The main content area is titled 'Order status > Create order request'. It features a form with the following fields: School (Real Journey Academies Inc (corp)), Grant (0000-Unrestricted), and Date required (06/24/2025). Below these are buttons for '+ Import order items', '+ Supplier portal', and '+ Add from catalog'. A table for 'Order items list' is shown with columns: Item, Vendor, Operations (Do Not Use), Year (If Applicable), Goal, Function, LCAP, Operations, Quantity, Unit, Unit cost, and Line cost. At the bottom, it shows 'Total estimated cost: 0.00 USD' and a 'Next approver' dropdown menu. A green circle with a white 'E' is overlaid on the bottom left of the screenshot.

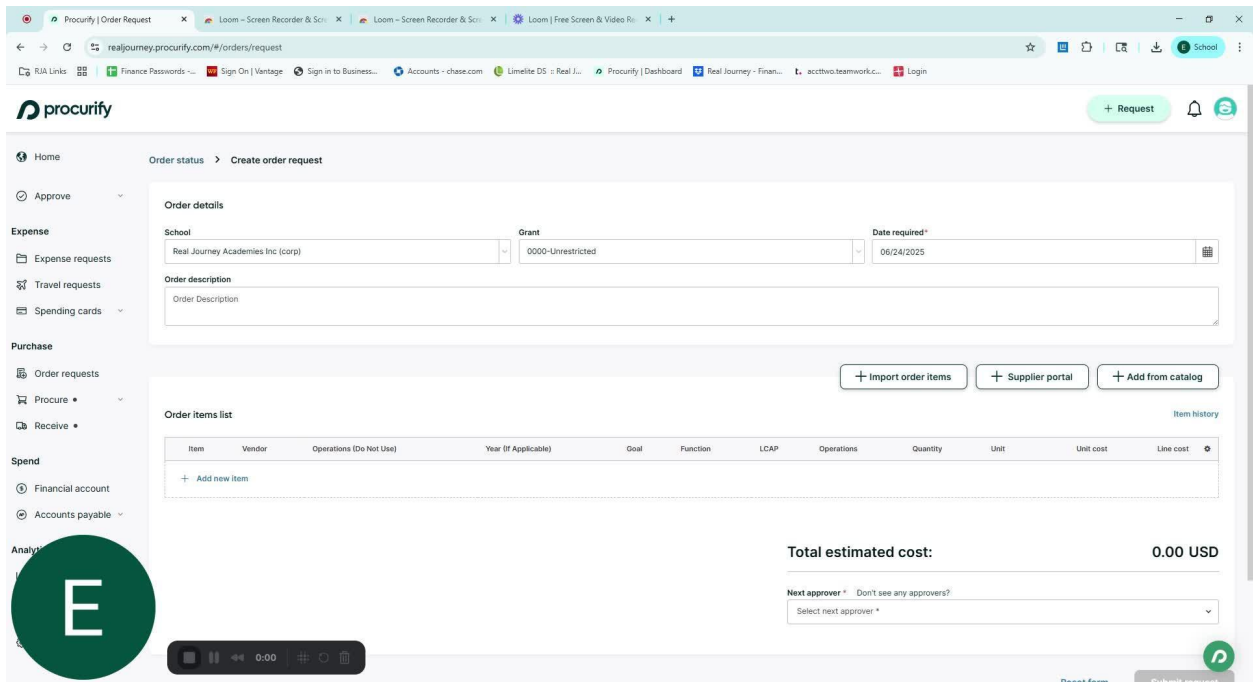
- Start on the homepage of the system.
- Select 'Request' from the menu.
- Choose 'Order' or 'Order Request' to proceed.

Step 2: Select the Request Order 0:27



- Click on 'Request Order' to open the order request screen.

Step 3: Choose the School Site 0:40



- Select the appropriate school site for the request (e.g., 'Home Office').

Step 4: Select the Grant 0:52

Procurify | Order Request

realjourney.procurify.com/#/orders/request

procurify

Home

Order status > Create order request

Expense

Expense requests

Travel requests

Spending cards

Purchase

Order requests

Procure

Receive

Spend

Financial account

Accounts payable

Order details

School: Real Journey Academies Inc (corp)

Grant: 00 - Undistributed CTE

Date required: 06/24/2025

Order description

Order Description

Order items list

Item Vendor Operations (Do Not Use) Year (If Applicable)

+ Add new item

Import order items + Supplier portal + Add from catalog

Total estimated cost: 0.00 USD

Next approver: Don't see any approvers?

Select next approver

Reset form Submit request

- Choose the relevant grant for the order.
- If no grant applies, select '000' for the general fund.

Step 5: Contact Finance if Necessary 1:20

Procurify | Order Request

realjourney.procurify.com/#/orders/request

procurify

Home

Order status > Create order request

Expense

Expense requests

Travel requests

Spending cards

Purchase

Order requests

Procure

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Financial account

Accounts payable

Order details

School: Real Journey Academies Inc (corp)

Grant: 0000-Unrestricted

Date required: 06/24/2025

Order description

Order Description

Order items list

Item Vendor Operations (Do Not Use) Year (If Applicable) Goal Function LCAP Operations Quantity Unit Unit cost Line cost

+ Add new item

Import order items + Supplier portal + Add from catalog

Total estimated cost: 0.00 USD

Next approver: Don't see any approvers?

Select next approver

Reset form Submit request

- If any approver besides your supervisor appears, contact the finance department for clarification.

Step 6: Add a New Item 1:32

Procurify | Order Request

realjourney.procurify.com/#/orders/request

Back to catalog

Add new item

Description

Product name *

Paper

Account code *

Select an account code

Preferred vendor *

Search for preferred vendors

SKU

Input a product SKU

How many do you need?

Quantity *

1

Unit type *

each

Estimated price *

Estimated price

Currency *

USD

Additional fields

Operations (Do Not Use)

OFF

Year (If Applicable)

Year (If Applicable)

Goal *

Goal

Function *

Function

- Enter the item name (e.g., 'Paper').
- Specify the account code (e.g., 'Office Supplies').
- Select the preferred vendor (e.g., 'Kelly Spicers').
- Input the estimated price (e.g., '\$100').

Step 7: Save the Order 2:11

Procurify | Order Request

realjourney.procurify.com/#/orders/request

Paper

Account code*
4310 - Office Supplies

Preferred vendor*
Kelly Spicers Stores

SKU
Input a product SKU

How many do you need?

Quantity*
1

Unit type*
each

Estimated price*
100.00

Currency*
USD

Additional fields

Operations (Do Not Use)
☐ OFF

Year (If Applicable)
Year (If Applicable)

Goal*
Goal

Function*
Function

LCAP*
Lcap

Operations*
☐ OFF

Comments
Provide more details about this item. ex: urgency, licenses, payment terms, contact info...

- Ensure all information is correct and save the order.

Cautionary Notes

- Always double-check the selected grant and approver to avoid delays in processing.
- Ensure that the item details are accurate to prevent issues with order fulfillment.

Tips for Efficiency

- Familiarize yourself with the preferred vendors to streamline the ordering process.
- Keep a list of commonly ordered items and their account codes for quick reference.

Link to Loom

<https://loom.com/share/2edd5d35a28045db9833c04f9c90e631>