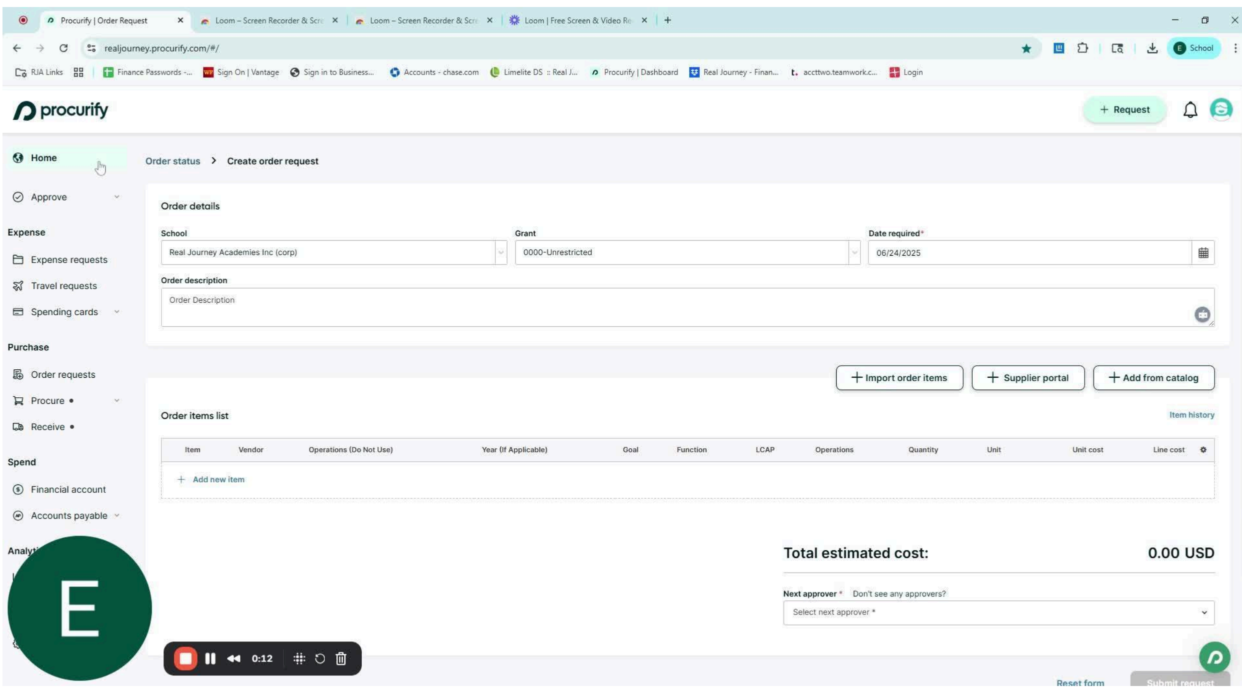
Creating a Purchase Order Requisition

Objective

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

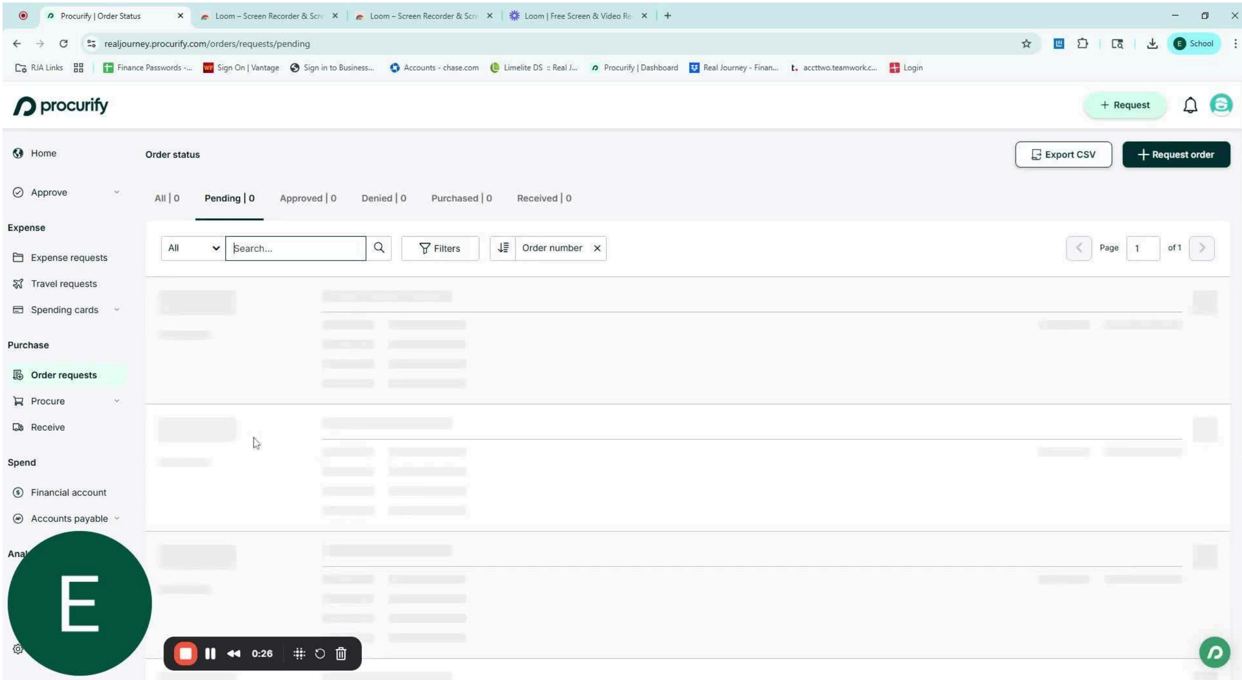
Key Steps

Step 1: Access the Order Request 0:13



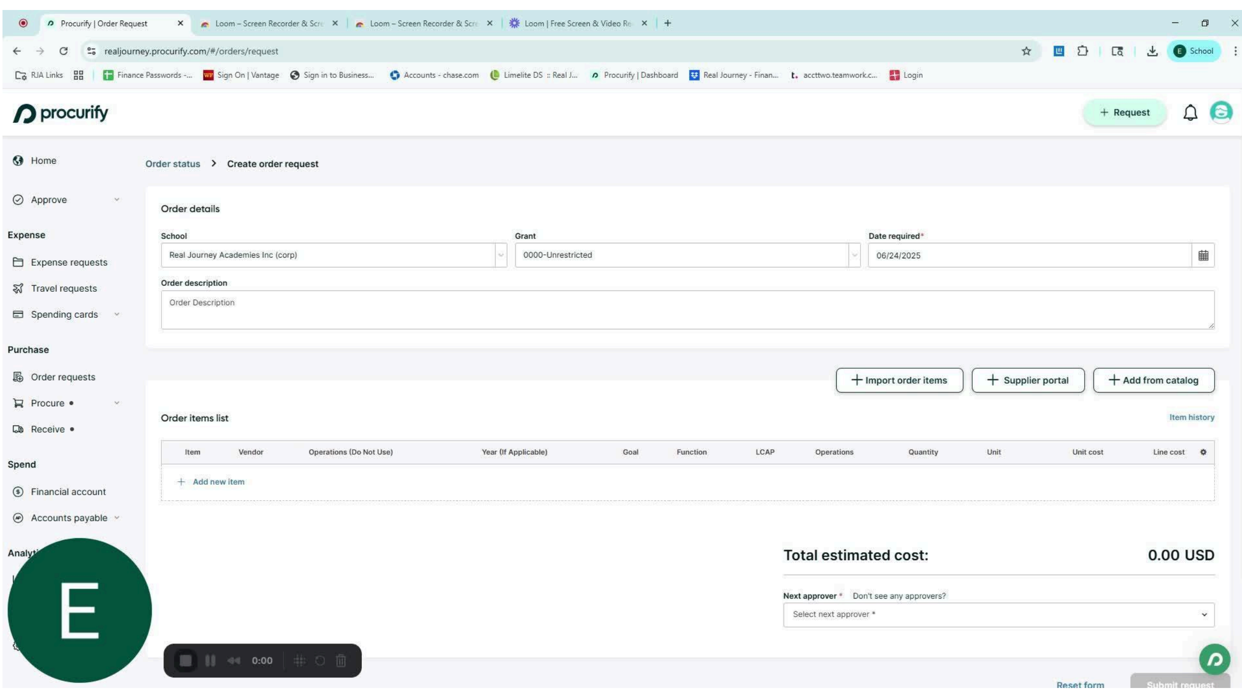
- Start on the homepage of the system.
- Select 'Request' from the menu.
- Choose 'Order' or 'Order Request' to proceed.

Step 2: Select the Request Order 0:27



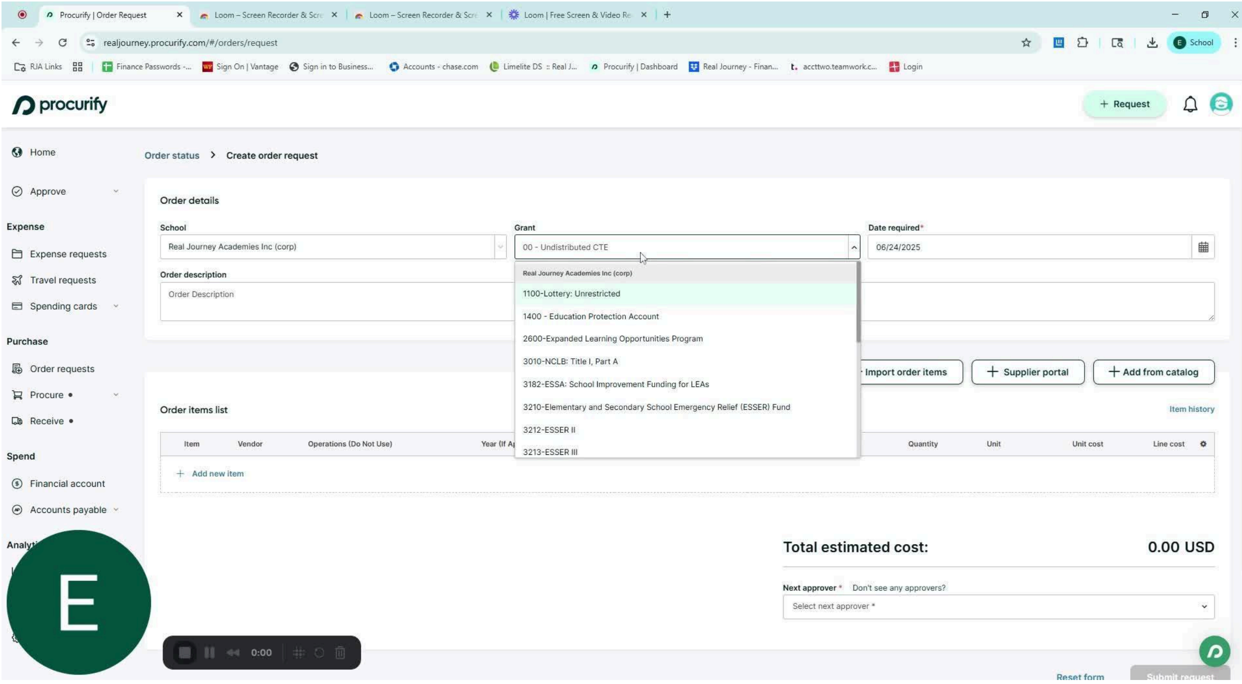
- Click on 'Request Order' to open the order request screen.

Step 3: Choose the School Site 0:40



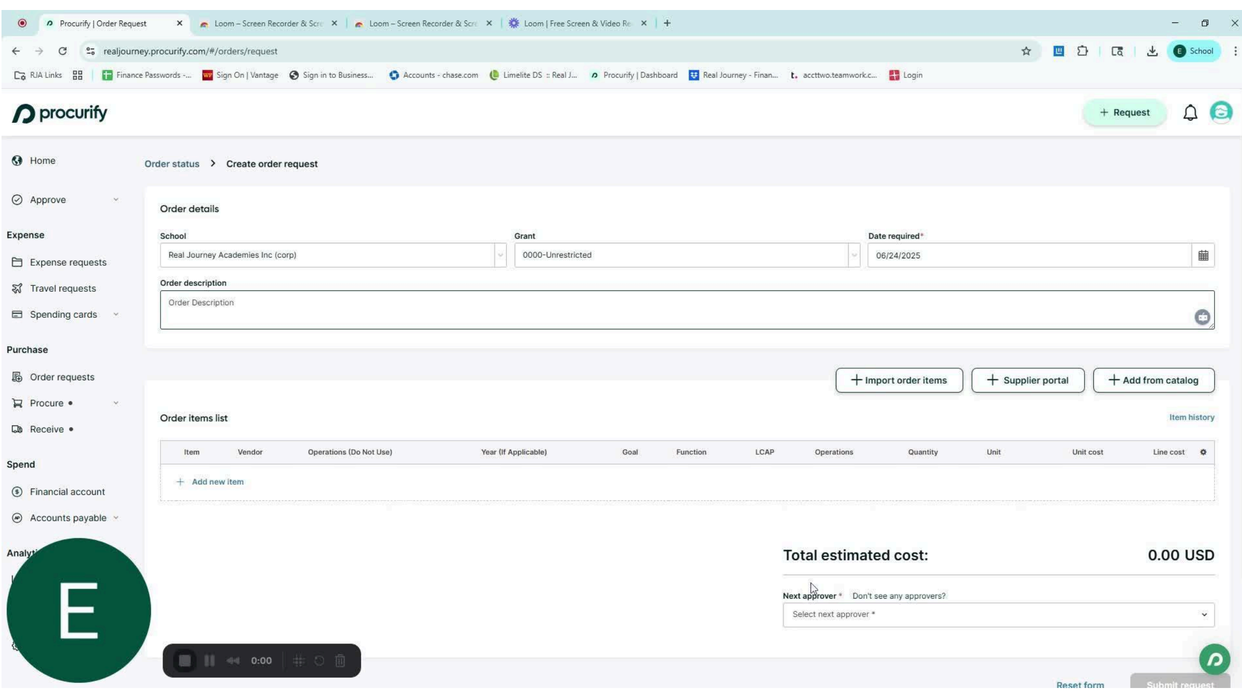
- Select the appropriate school site for the request (e.g., 'Home Office').

Step 4: Select the Grant 0:52



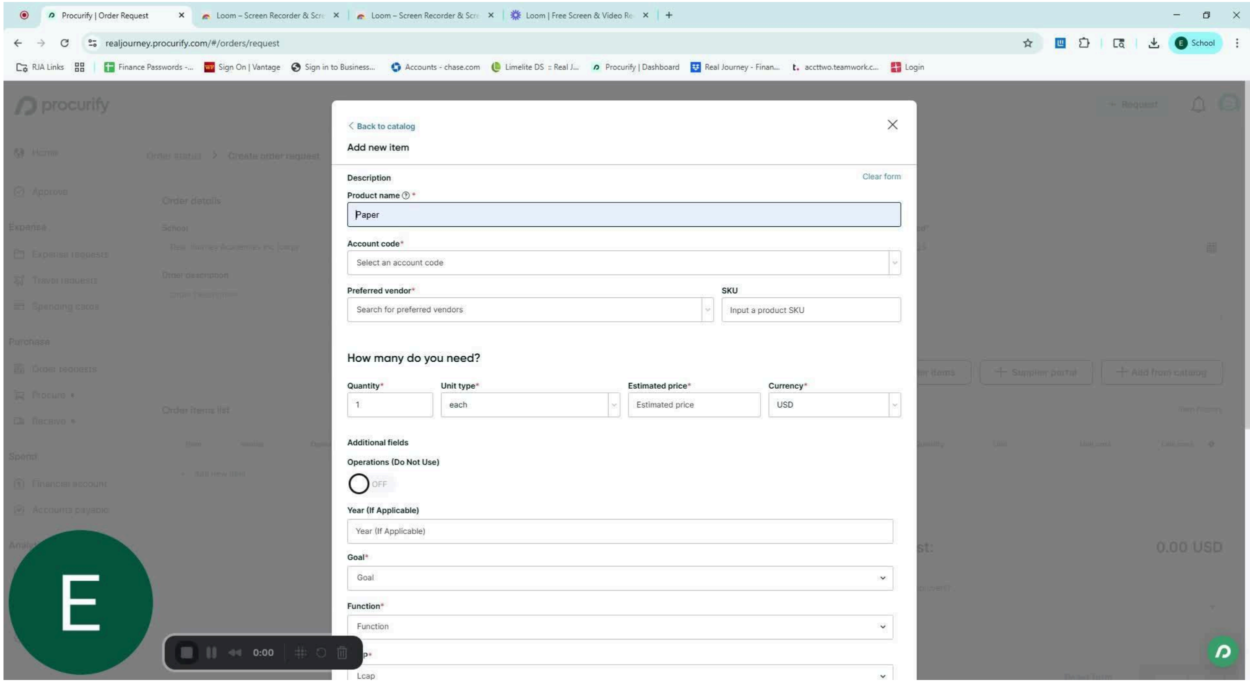
- Choose the relevant grant for the order.
- If no grant applies, select '000' for the general fund.

Step 5: Contact Finance if Necessary 1:20



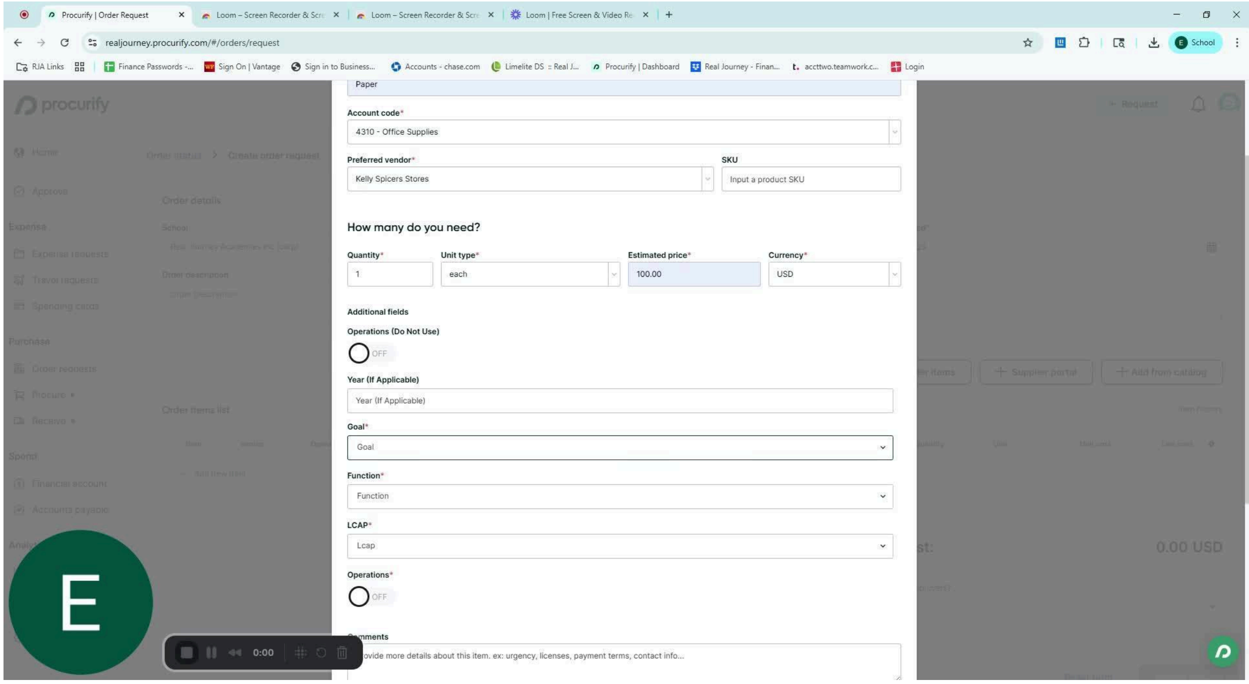
- If any approver besides your supervisor appears, contact the finance department for clarification.

Step 6: Add a New Item 1:32



- 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



- 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