Create Purchase Requisition

1. Account Assign. Cat - K, G, P, or X
2. I (Item Category – leave blank for GOODS // or “D” for a SERVICE (SPC)
3. Material Group - select from drop-down menu
4. Short Text – part# and/or brief description
5. Quantity - leave blank if “I” = “D” (SERVICE)
6. Unit of measure – select from drop-down menu // or “AU” for SERVICE
7. Deliv. Date – (a) GOODS = 2-weeks from date of entry; (b) SERVICES (one-time) = date of performance/service; (c) RENEWALS = last day of FY
8. Valuation – $ per item or leave blank if SERVICE
9. Requisitioner – initials and phone extension
10. Tracking – references prior year # for renewals (PO, SPC, or Outline Agreement) or Blanket PO#.
11. Des. Vendor - Search w/ zip code, or leave blank and provide vendor contact info in “ITEM NOTE” under the ‘TEXT’ tab at bottom of PR. Search function can be performed by clicking on dropdown (see “Search” on next page).
12. PG - “300”
13. Plant - “30”
14. POrg - “LOCL”
15. Agreement - Outline Agreement #
16. Item - Line # of referenced Outline Agreement; usually “1”
**SEARCH RESULT**

NOTE: Columns can be sorted by <clicking> on the TITLE of the column to be sorted.
“ACCOUNT ASSIGNMENT” Single or multiple cost centers can be entered...

“MULTIPLE ACCOUNT” split as percentage or per item ... if dollar amount is to be split, flip the dollar amount with quantity on the LINE ITEM and split as “per item”
“RELEASE STRATEGY” displays whether or not the PR has been released and routed to Procurement for issuance of a PO.

“TEXTS” is the area to place any additional information (including specifications) for stated line item.

“RELEASE STRATEGY” displays whether or not the PR has been released and routed to Procurement for issuance of a PO.

“STATUS” displays issued PO...<double-click> on PO# to display PO and any notations in the HEADER TEXT left by Procurement; i.e. Order Conf.#, Shipping info, Status, etc.