



Purchase Requisition Form

The purpose of this document is to provide an overview of the Softdocs/PCGenesis Purchase Requisition Form that is available to you in the **Etrieve Central** Library. The functionality of this form is to provide some assistance and allow the user a number of possibilities when starting or completing the official purchase of items from authorized vendors.

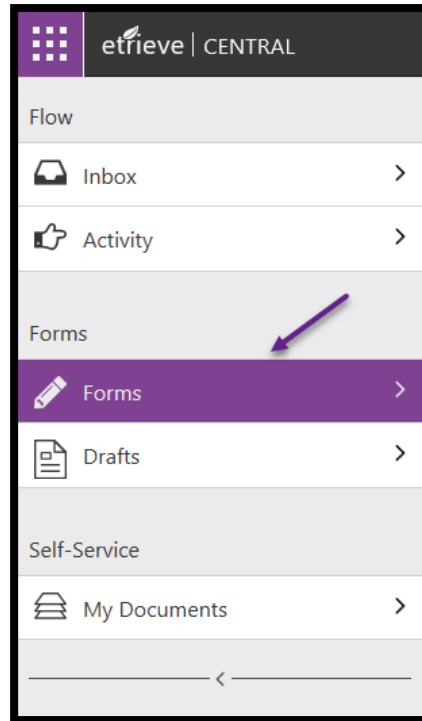
Table of Contents



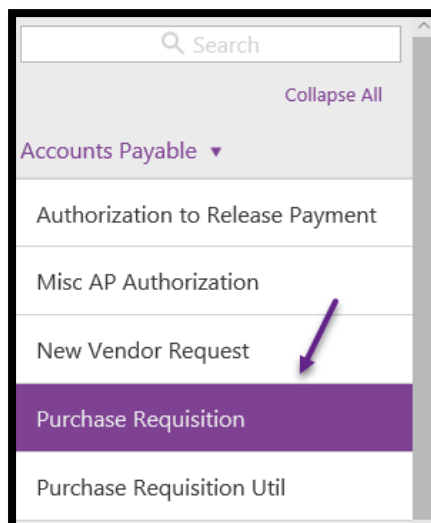
.....	1
Purchase Requisition Form	1
Initiating a new Purchase Request	3
Header Information.....	4
Section 1: Billing Information.....	5
Section 2: Shipping Information.....	5
Section 3: Vendor Selection	6
Section 4: Line Item Details.....	7
Section 5: Account Information	8

Initiating a new Purchase Request

Once you have used your **Etrieve Central** credentials to log in to the system, the user can select the Forms Library option from the Menu list on the left of the screen.



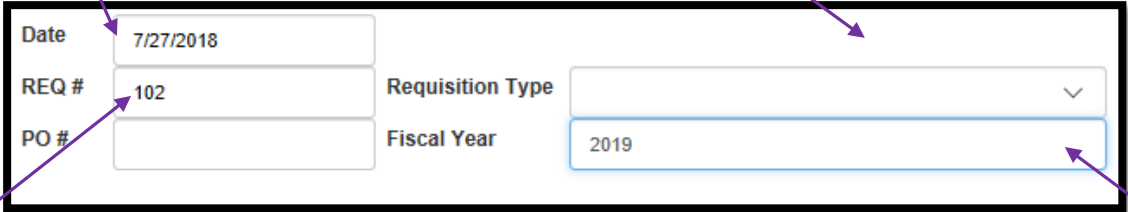
The Form Library will be presented to the user in the Center panel of the screen. Selecting the Purchase Requisition Form from the list will present a blank Purchase Requisition form to the user in the viewer panel on the right side of the screen.



Header Information

The fields listed in the Header information of a new Purchase Requisition Form are:

- **Date** – The date this Requisition was started.
- **Req No.** – The auto-generated number assigned to this Requisition.
- **Requisition Type** – A selectable list of available Types for the user to select from.
- **Fiscal Year.** – The Fiscal Year this Requisition should be applied to.
- **Purchase Order Number** – The associated Purchase Order Number or Prefixes for the user to enter.



The screenshot shows the header information form with the following fields and callouts:

- Date:** 7/27/2018. Callout: "Requisition Date Defaults to the Current Date".
- REQ #:** 102. Callout: "Req No. is automatically generated by the Web Service and is not editable by the User."
- PO #:** (empty field).
- Requisition Type:** (dropdown menu). Callout: "The User is presented with a selectable list of available Requisition Types to choose from."
- Fiscal Year:** 2019. Callout: "Fiscal Year to file the Requisition."

Section 1: Billing Information

The next step in the process of starting the Purchase Requisition is to Select the correct Billing address from the provided drop down list box. Selecting an option in the list will auto-complete the rest of the information. The ATTN, Contact and In Care Of fields can be edited if necessary.

Billing Information			
School:	Tift County Board of Education		
Address 1:	207 North Ridge Ave.		
Address 2:	P.O. Box 389		
City:	Tifton		
State:	GA	Zip:	31793
ATTN:			
Contact:	Tanika Wilcox		
In Care Of:			

Section 2: Shipping Information

The Shipping Information is where you will select from allowable Shipping Locations to receive the specified order. If a location is missing or an address changes you will need to contact your system administrator to have the information updated. Once you make your selection the information will auto-complete and you will be able to edit the ATTN and Contact fields if necessary.

Shipping Information			
School:	Tift County Board of Education - 8010 - Klinton Guess		
Address 1:	207 North Ridge Ave		
Address 2:	P.O. Box 389		
City:	Tifton		
State:	GA	Zip:	31793
ATTN:			
Contact:	Klinton Guess		

Section 3: Vendor Selection

This section allows you to select from a list of provided Vendors that you can use for this purchase. If a Vendor is missing from this list you will need to submit the New Vendor Request for to get the new vendor added in to the system. Once you select the Vendor that you are using for the purchase the information will auto-complete and you will be able to edit the ATTN and Contact fields.

Vendor Information

Name:

Vendor Number:

Address 1:

Address 2:

City:

State: Country: Zip:

ATTN:

Contact:

Phone: Fax:

Email:

Delivery: Fax Email Other

The Order Description is a required field in PC Genesis so you will need to enter a description of this purchase in this field before submitting the form.

Order Description

Description:

Section 4: Line Item Details

This section is where you will enter in the items that you are purchasing.

Qty – The number of this particular item that you would like to order

Unit – The unit of measurement for this item. Limited to two characters

Item#/Description – The Item number or a description of the item being ordered

Unit Price – The individual cost of this specific item

Total Amount – Will be calculated for you by multiplying the Qty field by the Unit Price field.

Fixed Asset – Check this box if this purchase is considered a Fixed Asset.

+ or - buttons – These buttons will allow you to add/remove lines for more or less items on this purchase

Product Information +

Qty	Unit	Item # / Description	Unit Price	Total Amt	Fixed Asset
					<input type="checkbox"/>
+		-		Total:	

Up to 50 line items can be purchased on a single Requisition.

The Total of all line item purchases will be calculated for you and must match the total in the upcoming Account Information section.

Section 5: Account Information

The final section allows you to enter in information on where the funds for this purchase are to be located. The cost of a Purchase Requisition can be divided among up to 25 different accounts.

Acct. No – The PC Genesis account number to be used for the above purchase.

Amount – How much of the total cost of this purchase to deduct from this Acct. No.

+ or – buttons – These buttons allow you to add or subtract additional lines in order to divide the total cost of this purchase requisition across multiple accounts.

Total – The total will be calculated for you and **MUST** match the total from the Line Item section.

Account Information

BE SURE TO KEY THE ENTIRE LEDGER ACCOUNT NUMBER(S): XX-XXX-X-XXXX-XXXX-XXXX-XXXX-X-XXXXXX

Acct No:	<input data-bbox="490 886 1219 940" type="text"/>	<input data-bbox="1230 886 1432 940" type="button" value="Amount"/>
<input data-bbox="172 957 483 1012" type="button" value="+"/>	<input data-bbox="483 957 795 1012" type="button" value="-"/>	Total: <input data-bbox="1230 957 1432 1012" type="text"/>