

## Purchase Request Entry Top 10

1. Refer to Product Catalog on Purchasing website for a list of contracted items.
2. REQUESTED BY field is auto completed, but please add your phone number.
  - a. This helps if anyone has questions about the PR/PO later on.
3. If using TBA as the VENDOR ID, all vendor information should be typed in last line in the items section of the PR.
  - a. Vendor Name
  - b. Order Address
  - c. Phone number, fax number, email
4. DO NOT touch the REMIT TO ID.
  - a. The correct information is auto filled for you.
5. END USE is a required field.
6. Add REQUISITION CODES when necessary.
  - a. AT for attachments
  - b. IC for Independent Contract Agreements (ICA)
7. Complete the SHIP TO ID with your site RC.
  - a. OR for computer orders (iPads, desktops, laptops, servers), please use RC 098 (Purchasing Warehouse).
8. ALWAYS add a shipping line.
  - a. If no actual shipping, enter a \$0 item.
9. Run the DW2001 (Purchase Order Summary Report) to view all PO's for your site in any one fiscal year.
  - a. Dates default to the current fiscal year. Only change if you need a different fiscal year.
  - b. Enter your site RC in the "Ship-to ID" field. (You can also enter your site RC,098 to ensure you capture all computer related orders as well....all computers ship to the Warehouse 098, not your site.)
  - c. Click submit.
10. Run the DW2002 (Purchase Request Summary Report) from the ALL TAB to view all PR's (not fully approved) for your site in any one fiscal year.
  - a. Dates default to the current fiscal year. Only change if you need a different fiscal year.
  - b. Enter your site RC in the "Ship-to ID" field. (You can also enter your site RC,098 to ensure you capture all computer related orders as well....all computers ship to the Warehouse 098, not your site.)
  - c. Click submit.

Call if you need help:

- Kelly Case, Business Process Trainer, 775-789-3438, [klcase@washoeschools.net](mailto:klcase@washoeschools.net)
- Accounts Payable Supervisor, 775-348-0274