BusinessPlus

Step	Action – Create a Purchase Request
1	Open dashboard and click on **POUPPR** (Purchase Requests)
2	You enter in search mode. Click the **+** at the top left to **create a new PR.**
3	Click the to bring up a drop-down box. Choose PR.SEED to auto generate the **PR number.** *Be sure to write this number down for reference.*
4	The **Security Code** will auto populate. Use the drop down menu if you need to change it.
5	**Date Requested** will auto populate. The only time you would change this is when creating a PR for an upcoming fiscal year, during the current year (9/1/YEAR).
6	Add the **Vendor ID**. To access vendor information, click to go to the vendor lookup screen, then select the **Vendor Addr Code.** The **Remit To ID will auto populate** when the PR is saved. Do not enter anything in this field.
7	**Details** – enter the name of the person or department for which the goods/services are being purchased in the **End Use** field. **USE ALL CAPS.**
8	**Requisition Codes** are added. These are 2-digit codes indicating the Fiscal Year, Business Services location (OB/OC/OD), and other PR information. Utilize the drop-down boxes to select the req codes. You will normally have at least two.
9	Add the **Ship To ID**. Click to go to the lookup screen. All Ship To IDs begin with an **S** and will be the address where goods will be shipped, or services performed. Be sure the **Ship To Addr Code** is populated/selected. The **Bill To ID will auto populate** when the PR is saved. Do not enter anything in this field.
10	**Items** – item 0001 will auto populate. Add **Quantity**, **Unit Price** (reverse quantity & unit price for open PO's) and **Units** (via drop down box only if applicable for CS, BX, EA, etc)
11	Add **Item Description** to include item(s) being purchase or service being performed. Include details such as quote number, date/location of event, etc.
12	**Notes** – this tab will lead you to **PR notes** (internal not printed on PO), **Print Before** notes (will print on PO – great for adding an e-mail address to send PO to) or **Print After** (will print on PO - great for delivery instructions to vendor).
13	**Account** – Enter account/budget code under **Org Key** and **Object Code**.
14	**Tax Code** – populates to 9.9%. You can use the drop-down menu if you need to change the rate or remove it (use **Not Selected** for Open PO's).
15	When entry for the PR is complete, press enter. Verify you receive the (green) **Record Accepted** message at the top right side of the screen.
16	To add a second item, return to **Items,** which will auto populate to item 0002 (repeat steps 10 – 15). If not needed, skip to next step.
17	The PR is now ready for workflow approval. On the far left menu screen, click on to open your **Pending Tasks** (workflow).
18	The selection at the top of your (now open) menu (under **Approvals**) is set to **Purchase Document**. If not, use the drop down box to toggle. You will see your pending PR and your options to: **Approve** or **Reject**, then submit.