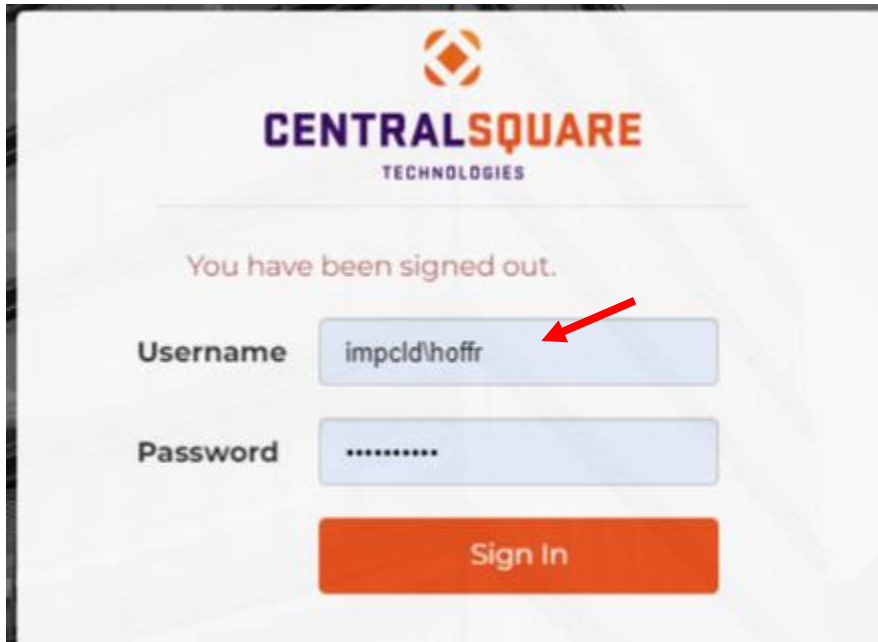


# HOW TO CREATE A PURCHASE REQUEST

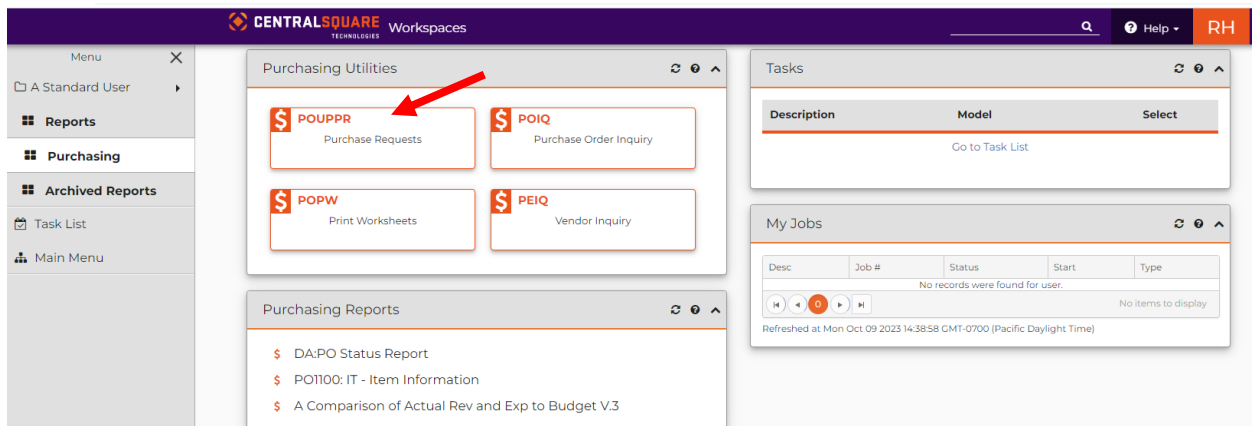
Your password in will be the same as it was in OneSolution, your Username will begin with impcd\ then followed by first 4 letters of last name and first letter of first name. Passwords must consist of at least 8 characters numeric and symbols can be any of the following; ! ? \$. Do not use your birthdate, name or common information.


**NOTE:** Follow steps where the red arrow indicators are.

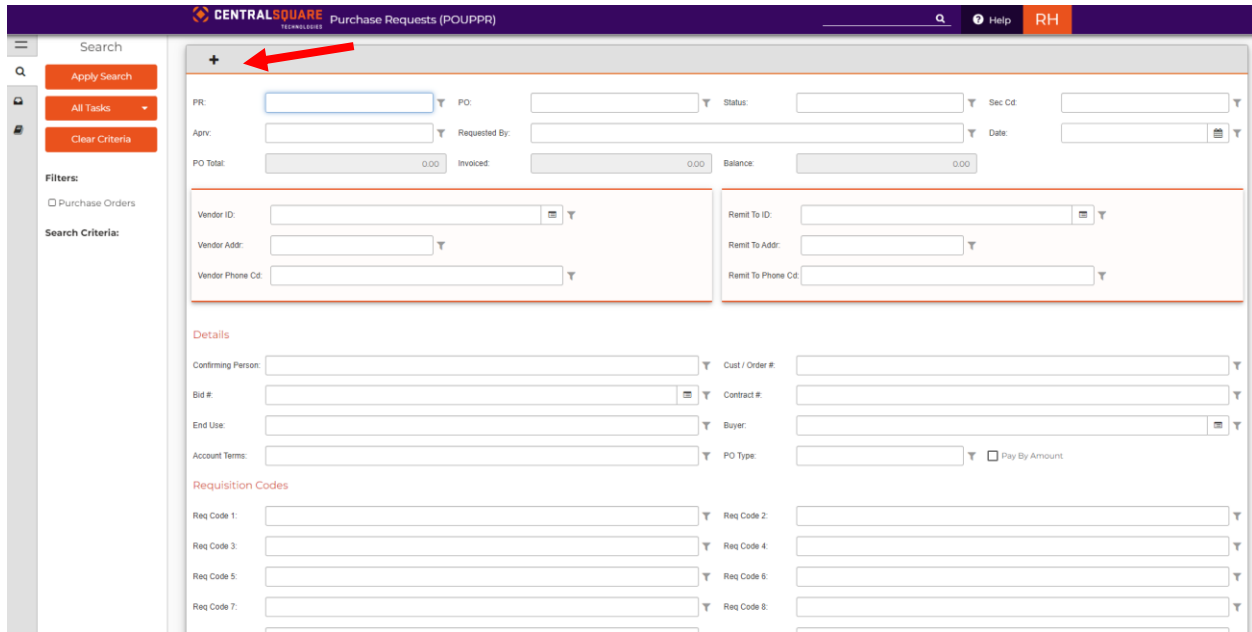


## Standard User

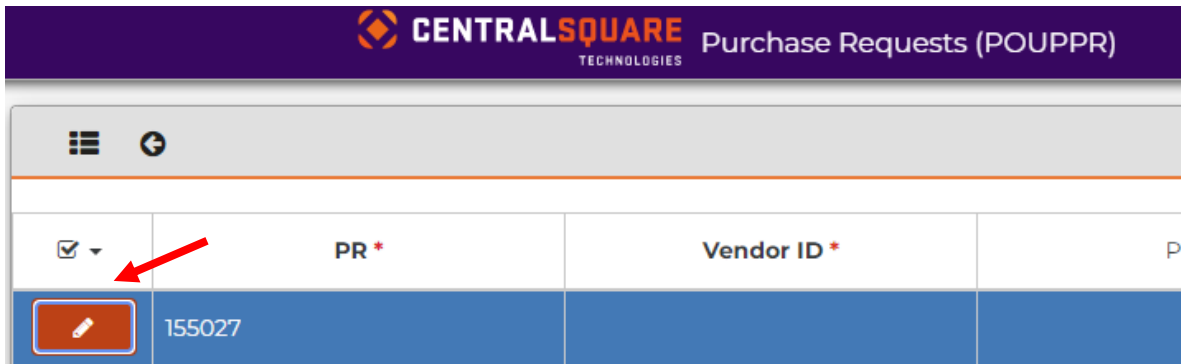
Select POUPPR Purchase Request, click button




Cursor should be in in the PR field. In the gray banner above, click the plus sign . Please note all red asterisk are required fields. PR:\*

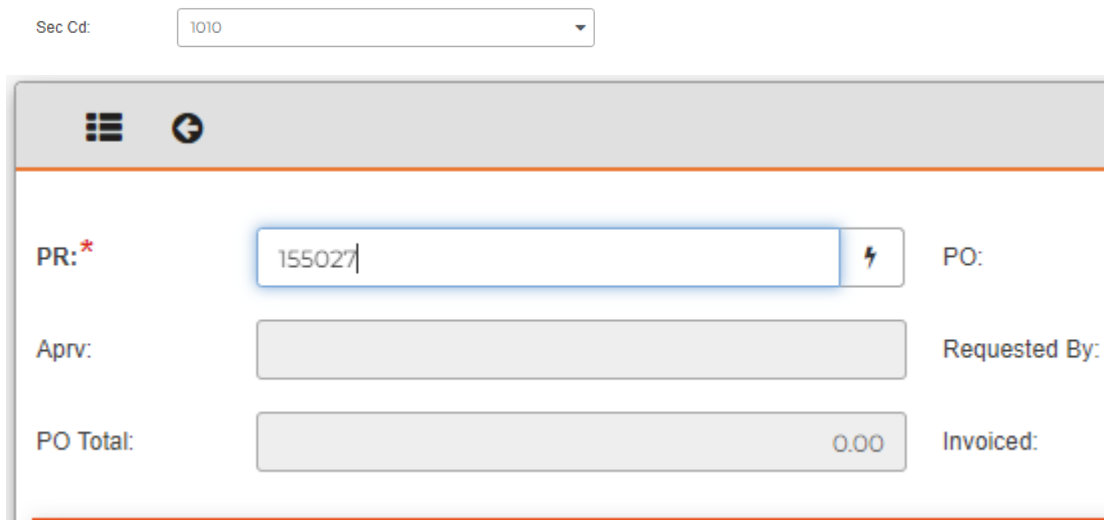


A new window will open up. The New Purchase Request number will be displayed (155027). Click the red pencil button.




<input checked="" type="checkbox"/>	PR *	Vendor ID *	P
	155027		

This will begin the new workspace for the new Purchase Request. In the top section everything will default based on your profile. If you have multiple Organization (Org.) Key associated to your profile you will have the ability to click on the arrow button to select a different Org. key.




Sec Cd:

PR:\*   PO:


Aprv:  Requested By:

PO Total:  Invoiced:


Vendor ID section: Click the button at the end of the field to search for the vendor name, see sample below. When searching for vendors you are still able to use the asterisk as a wild card, example \* construction \*, it can be used before and/or after a word.

Vendor ID:\*  

EL CENTRO ACE HARDWARE



Vendor Addr:  





1224 W HOBSONWAY  
BLYTHE, CA 92225

Vendor Phone Cd:   (760) 922-0361 E:111





### Data Lookup

Search ID Source:  

PE ID	Name	Doing Business As	Security CD	Pedb Code
<input type="text"/>	<input type="text" value="Constructio"/>  	<input type="text"/>	<input type="text"/>	
V12175	CONSTRUCTION BO...		VENDORS	P
V09632	CONSTRUCTION BO...		VENDORS	P
V13857	CONSTRUCTION EL...		VENDORS	P
V03775	CONSTRUCTION EX...		VENDORS	P
024000162	CONSTRUCTION HA...		AG	P
024022724	CONSTRUCTION HA...		SCHOOLS	P

Navigation:   **1**   1 - 13 of 13 items

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City
P1	30 OSER AVE	SUITE 500			HAUPPAUGE

Navigation:   **1**   1 - 1 of 1 items

Remit to ID Section: this will default based on your profile. DO NOT INPUT ANY INFORMATION. Once you save your new PR it will default with the Vendor ID number/information.

---

Remit To ID:	<input type="text"/>	
Remit To Addr:	<input type="text"/>	
Remit To Phone Cd:	<input type="text"/>	

---

Details Section: The PO Type will default to P for Standard PO, B Blanket Order and C Contract. Select B when opening a Blanket Purchase Order.

Details

Confirming Person:	<input type="text"/>	Cust / Order #:	<input type="text"/>
Bid #:	<input type="text"/>	Contract #:	<input type="text"/>
End Use:	<input type="text"/>	Buyer:	<input type="text"/>
Account Terms:	<input type="text"/>	PO Type:*	<input type="text" value="P"/> <input type="checkbox"/> Pay By Amount



PO Type: \*

Blanket Section; this section is used when opening new Blanket Purchase Orders. You will only need to enter the Blanket Amount, this amount is the same amount as the dollar amount you need the Blanket Purchase Order for be made out for.

Blanket

Blanket No:	<input type="text"/>	Blanket Amt:	<input type="text" value="ex. 0.00"/>
-------------	----------------------	--------------	---------------------------------------

Ship To Section should default to your location. Should you need the item(s) to be shipped to a different location you will need to click the button to make your selection.

Ship To ID:   


PURCHASING DEPARTMENT, IC

Ship To Addr: \*

1125 W MAIN ST  
EL CENTRO, CA 92243

Ship To Phone Cd:

Bill to ID will default to the Auditor Controllers Department.

Bill To ID:  

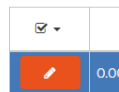
AUDITOR CONTROLLER, IC

Bill To Addr:

940 MAIN ST STE 108  
EL CENTRO, CA 92243



Bill To Phone Cd:


Product item section: this is where you will be adding the products that you are wanting to be purchased. You will need to click the pencil button. Once you click on the button the window will move back up to the top, you will need to scroll (right side of screen) back down to the bottom to enter the product information (see next page).




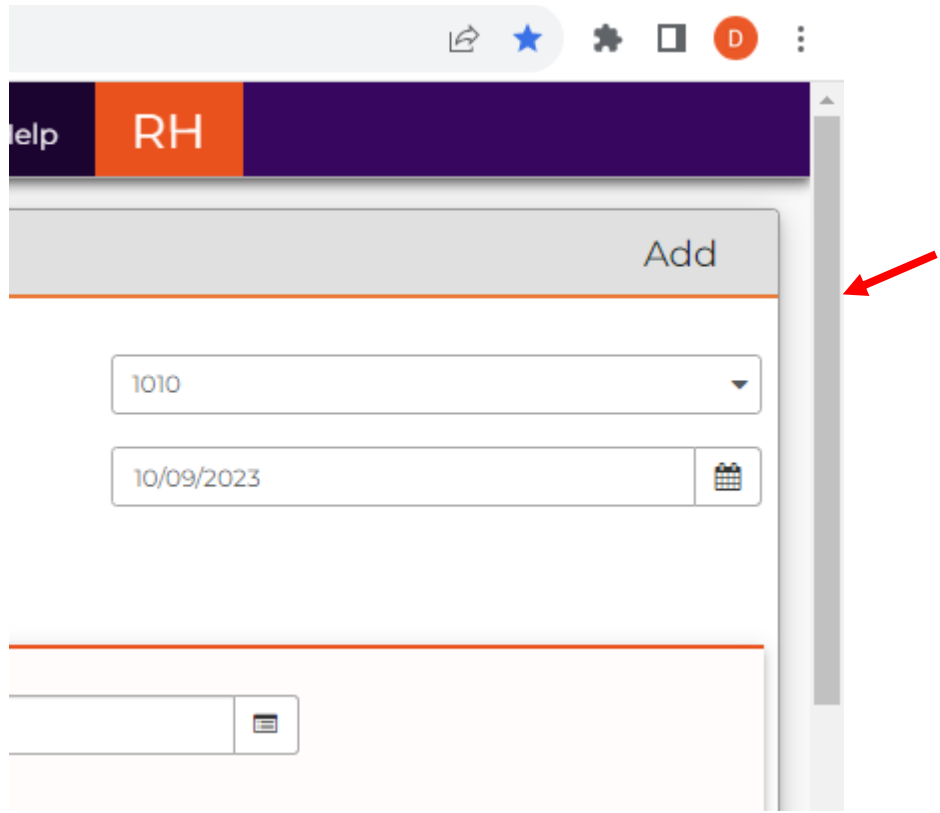
Items Compliance Notes Change Orders

---

<input checked="" type="checkbox"/>	Unit Price	Item Number *	Description *	Tax Code
 	0.00000	0001		EA



 Switch to Added Records



Begin entering the product information, number of items, quantity, units, unit price and description. Once you save the PR, the line item #2 will be generated.

Items Compliance Notes Change Orders

☰ Add

Item Number: \* 0001 Product ID: Quantity: \* 6,000 Units: EA

Unit Price: 500.00000 Extended Amt: 3,000.00

Item Description arena areas are

write out your description in this area

Account number section: enter the Org. key and Obj. key for your department. To change from Amount to Percent click the button next to "Switch To".

Account configuration interface showing the 'Switch to: Percent' button selected. The 'Account' section displays GL, 1010001, 524000, JL, PROJ KEY, ACTIVITY, and WORK ORDER. The 'Amount' section shows a total of \$3,000.00 and a remaining amount of \$0.00. A 'Delete' button is visible. Below the account information, there are various input fields for Pct Discount, Tax Code, Duty Code, Fixed Asset?, Requested By, Close, Ship To ID, Discount, Tax Amt, Duty Amt, Catalog Number, Brand Code, Charge Code, Charge Amt, Tax Code 2, Tax Amt 2, Join Code, Warehouse, Required Date, Encumber Date, Print Item?, Changed Item?, and PO Item Number.

To add another account number click the Add Account button, this is also known as splitting accounts.


Account configuration interface showing the '+ Add Account' button highlighted. The 'Account' section displays GL, 1010001, 524000, JL, PROJ KEY, ACTIVITY, and WORK ORDER. The 'Amount' section shows a total of \$3,000.00 and a remaining amount of \$0.00. A 'Delete' button is visible.

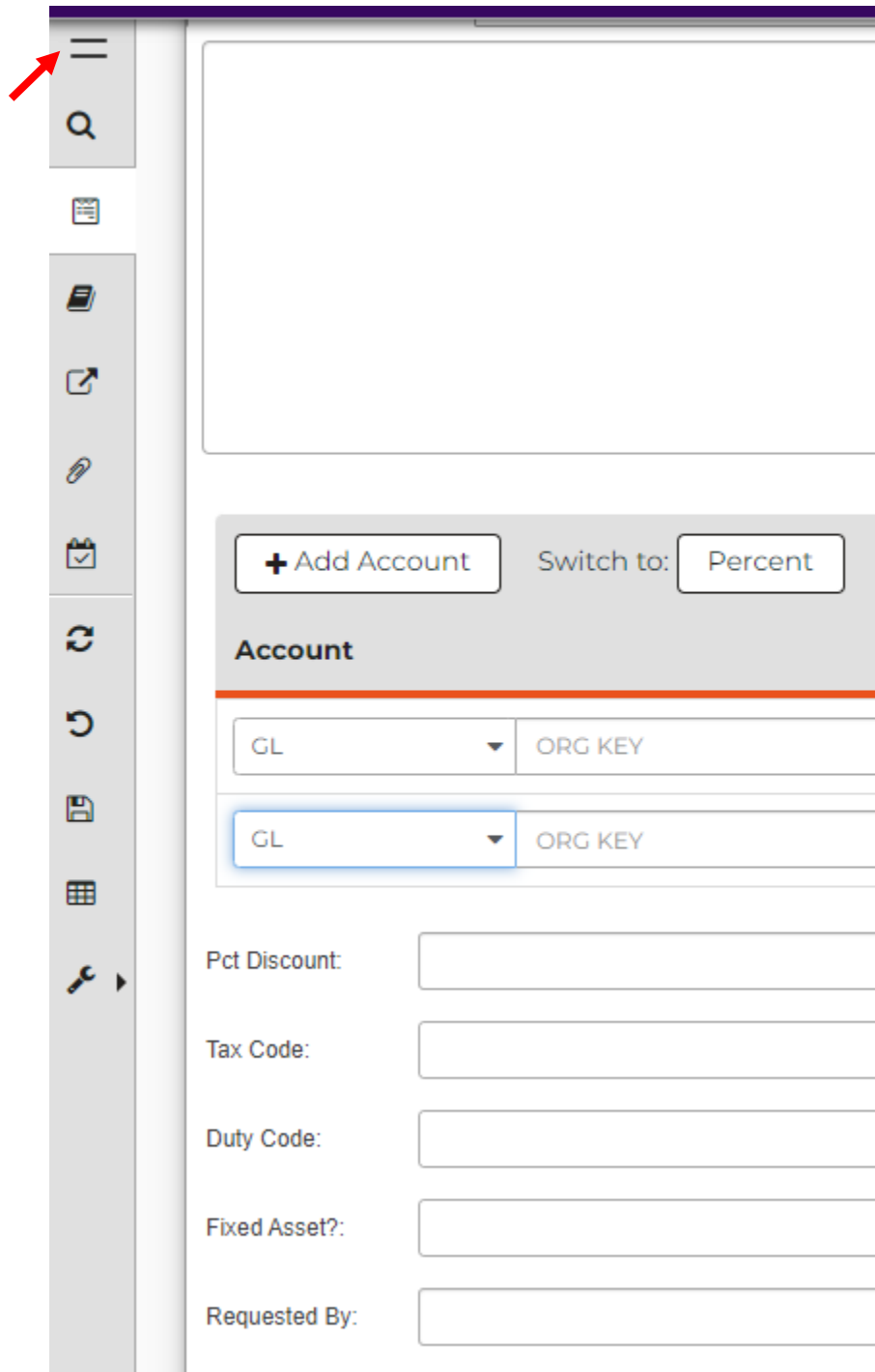
Account configuration interface showing the 'Switch to: Amount' button selected. The 'Account' section displays GL, 1010001, 524000, JL, PROJ KEY, ACTIVITY, and WORK ORDER. The 'Amount' section shows a total of 100.00% and a remaining amount of 0.00%. A 'Delete' button is visible.

Tax Code for El Centro rate is 25% and out side city limits is 7.75%.

Account configuration interface showing the 'Tax Code' dropdown menu open. The 'Account' section displays GL, 1010001, and 524000. The 'Tax Code' dropdown menu shows a list of tax rates with the following data:

Code	Description
7.75	7.75 Tax Rate
8.00	8.00 Tax Rate
8.25	8.25% TAX RATE
8.50	8.50% TAX RATE
8.75	8.75 Tax Rate
9.25	9.25 Tax Rate

At any point if you want to expand the left panel, click the double line button . See next screen to see the results.




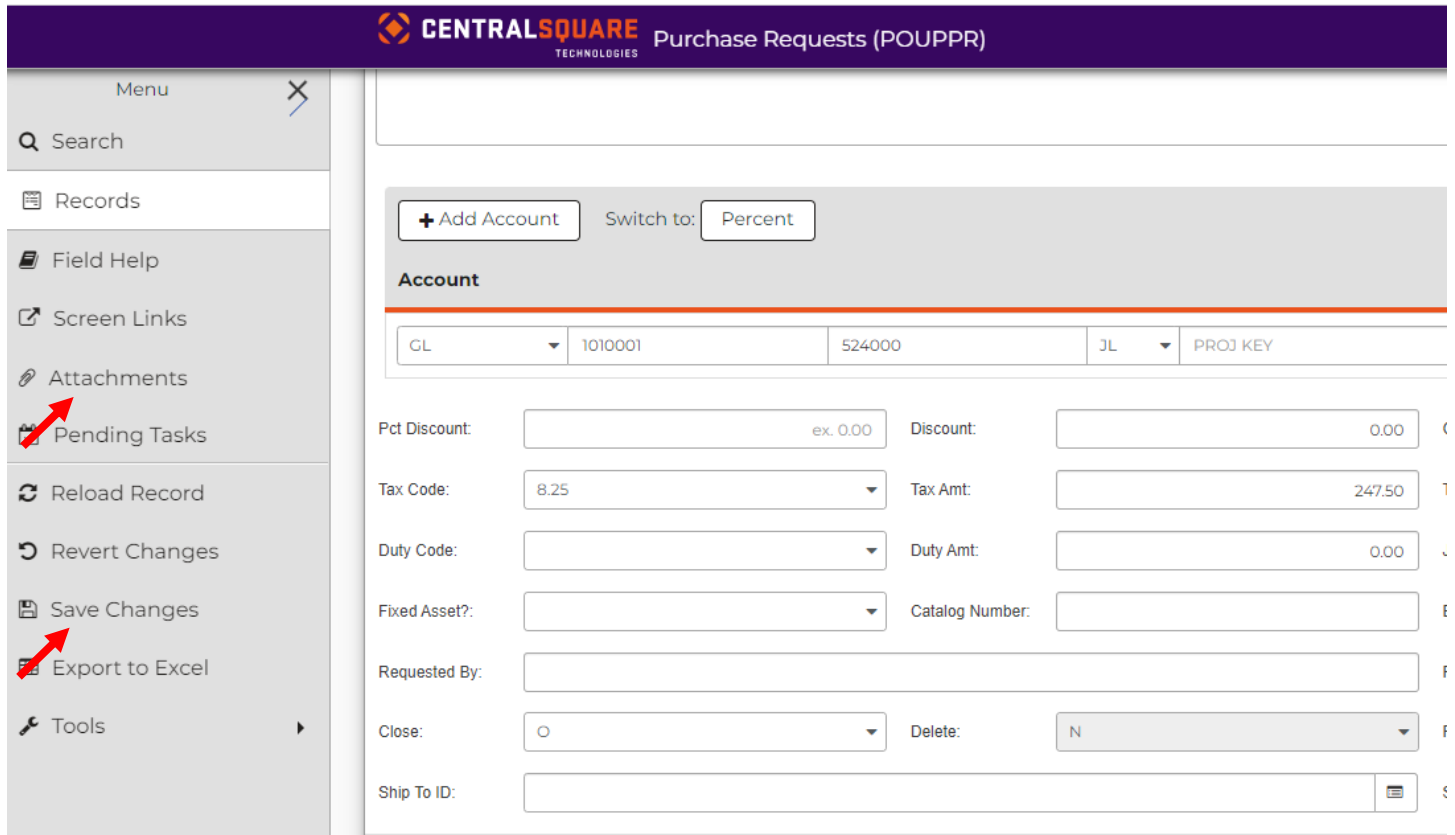
The screenshot displays a software interface with a vertical sidebar on the left. At the top of the sidebar is a double-line icon, which is highlighted by a red arrow. Below this icon are several other icons: a magnifying glass, a calendar, a document, a share icon, a link icon, a refresh icon, a circular arrow, a document with a checkmark, a document with a checkmark, a calendar, a grid, and a wrench. The main content area is divided into several sections. At the top is a large empty rectangular box. Below this is a section with a '+ Add Account' button and a 'Switch to: Percent' dropdown. Underneath is a section titled 'Account' with a red underline. This section contains two rows of input fields, each with a 'GL' dropdown and an 'ORG KEY' text field. The second row is highlighted with a blue border. At the bottom of the main area are five input fields labeled 'Pct Discount:', 'Tax Code:', 'Duty Code:', 'Fixed Asset?:', and 'Requested By:'.



Menu expanded.

To Add Attachments for your backup or supporting documents click the paper clip.

To Save your changes at any time click the  button for Save Changes. Then in the upper right corner the “Record(s) Accepted” should appear, see below green indicator, you have to click in the green box to continue.



**CENTRAL SQUARE TECHNOLOGIES** Purchase Requests (POUPPR)

Menu

Search

Records

Field Help

Screen Links

Attachments

Pending Tasks

Reload Record

Revert Changes

Save Changes

Export to Excel

Tools

+ Add Account Switch to: Percent

**Account**

GL	1010001	524000	JL	PROJ KEY
----	---------	--------	----	----------

Pct Discount:  Discount:

Tax Code:  Tax Amt:

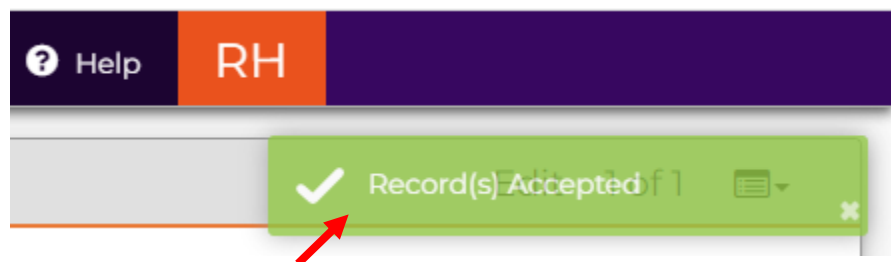
Duty Code:  Duty Amt:

Fixed Asset?:  Catalog Number:

Requested By:

Close:  Delete:

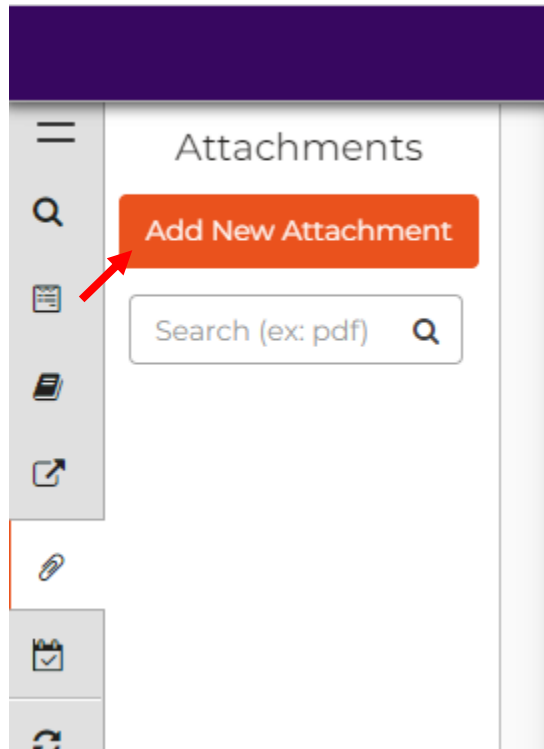
Ship To ID:



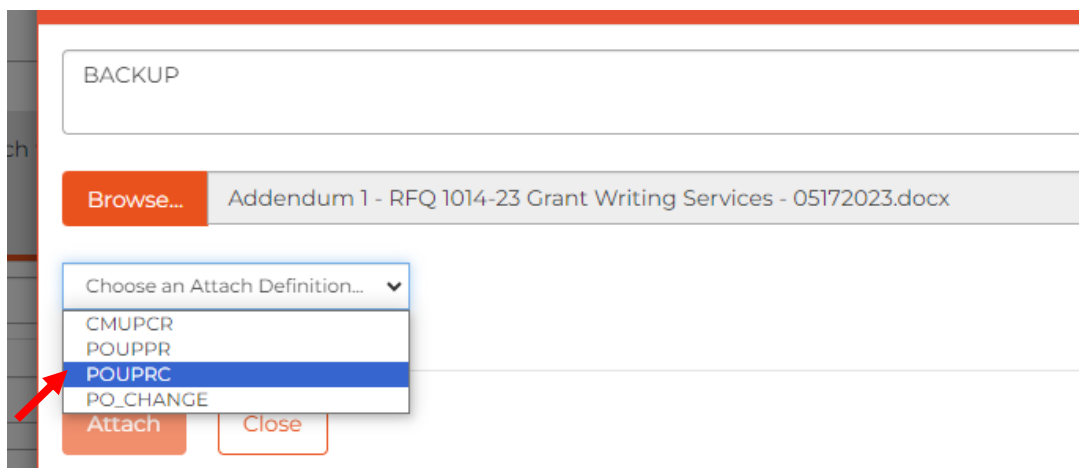
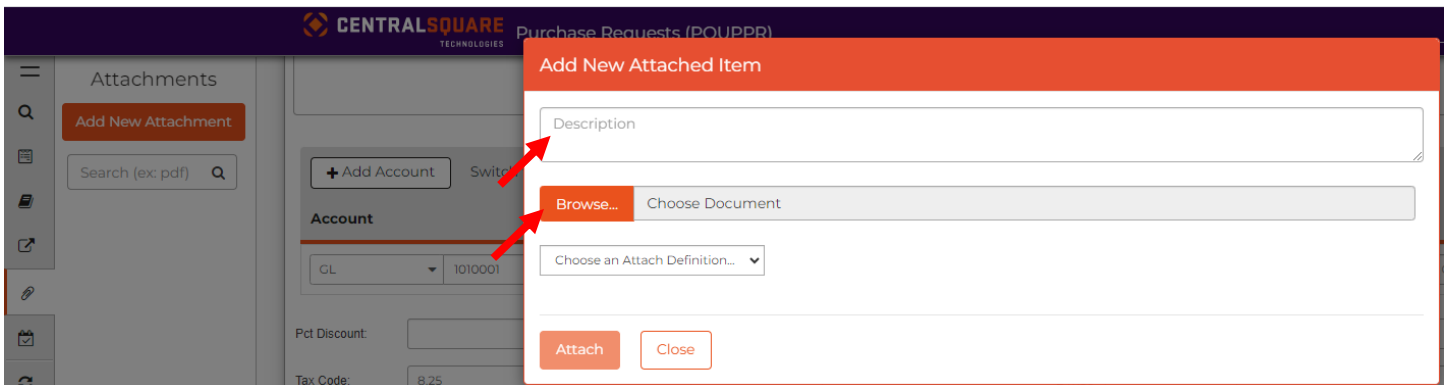
Help RH

Record(s) Accepted

Click the “Add New Attachment” button to add documents.



In the description field type in a description that best describes the document you are attaching. Then click the “Browse” button. Then click the Choose an Attach Definition, select the 3<sup>rd</sup> one, POUPRC, ALWAYS, do not select any other one.



Save changes, click in the green Record(s) Accepted box,

Menu X

Search

Records

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Reload Record

Revert Changes

Save Changes

Record(s) Accepted 1

PR: 155027 PO: Status: PR Sec Cd: 1010

Aprv: Requested By: Rhoda Hoffman Date: 10/09/2023

PO Total: 3,247.50 Invoiced: 0.00 Balance: 3,247.50

Vendor ID: V24417 EL CENTRO ACE HARDWARE

Vendor Addr: A1 1224 W HOBSONWAY BLYTHE, CA 92225

Vendor Phone Cd: OF (760) 922-0361 E:111


Remit To ID: 1024 SHERIFF DEPARTMENT, IC

Remit To Addr: P1 IV LECC 2477 LA BRUCHERIE RD SUITE C IMPERIAL, CA 92251

Remit To Phone Cd:

Your last step will be to approve the new Purchase Request (PR). Go back to your Home Workspace, see below.

Under the Tasks Section, you will see the new PR number, in this case the number is 155027. You are able to click on the

Select button on the right side . Once you click on it the button will turn green, then click the green box below to approve the PR. Purchase Request has been completed.

Menu X

A Standard User

Reports

Purchasing

Archived Reports

Task List

Main Menu

Purchasing Utilities

POUPPR Purchase Requests

POIQ Purchase Order Inquiry

POPW Print Worksheets

PEIQ Vendor Inquiry

Purchasing Reports

DA:PO Status Report

PO1100: IT - Item Information

A Comparison of Actual Rev and Exp to Budget V.3

Tasks

Description	Model	Select
PR: 155027~ PO: ~ Vend: V24417~ Stat: PR	PR_APPROVAL	<input type="checkbox"/>

Go to Task List

My Jobs

Desc	Job #	Status	Start	Type
No records were found for user.				

Refreshed at Tue Oct 10 2023 09:48:43 GMT-0700 (Pacific Daylight Time)

Tasks

Description	Model	Select
PR: 155027~ PO: ~ Vend: V24417~ Stat: PR	PR_APPROVAL	<input checked="" type="checkbox"/>

Go to Task List