

How to Submit Purchase Requisitions

Effective 3/01/2017



Definitions:

PR – Purchase Requisition: The initial document submitted to notify the approving official of items a department wants to purchase. This document includes all details of the vendor, items to be purchased and their total amount including shipping charges and attached quotes.

PO- Purchase Order: The document generated after all approvals have been made. This document will be issued to the vendor as a promise to pay.

Net 30: The terms of the purchase order that let the vendor know that payment will not be made immediately. The vendor will receive payment after the service or item is received

Purchase Flow

- (1) The Public Works Director will submit a purchase requisition and attach quotes and all information on the form.
- (2) The City Secretary will review the requisition and determine if the funds are available for the requisition. If so, the secretary will approve and if the funds are not available or it is determined the purchase is not needed she will deny the request.
- (3) If approved, the requisition will then go to the Mayor for final approval.
- (4) Once approved the Purchase Order will be automatically created in QuickBooks Online and can be sent to the vendor for purchase.

Training Videos

- (1) View Simple Step by Step Training videos on how to complete all of the processes. Visit this website:
<http://www.erequisition.com/tutorials>

View the following short videos in order.

1. How To Create A New Requisition
2. How To Review A Requisition
3. Creating a PO
4. Receiving Against A PO – This is the step to creating a bill to be paid after items are received.

How to get to the PR System to enter the request.

- (1) Go to the city website and in the top right hand corner, click the down arrow on “Quick Links” and click on “Purchase Orders”.



- (2) Login using your city email address and password and from here you can follow the steps learned in the video.

