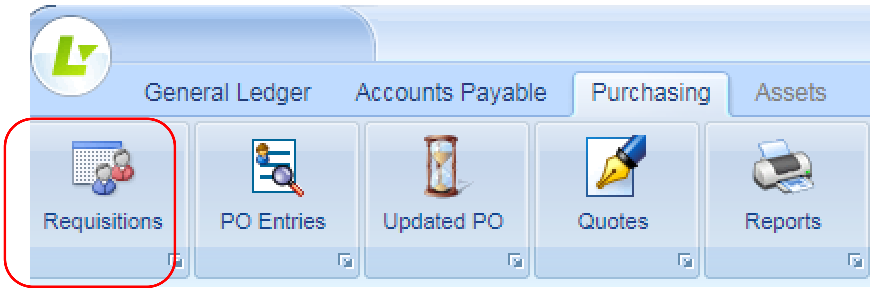
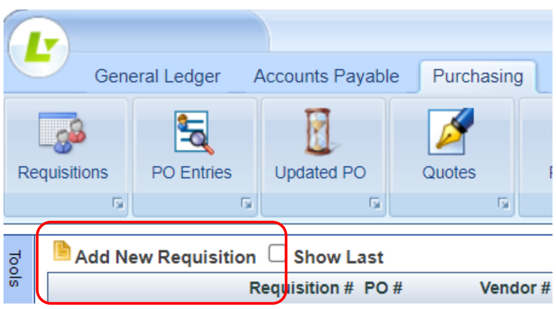
LOGICS REQUISITION ENTRY STEPS

1. Click on Purchasing, then Requisitions



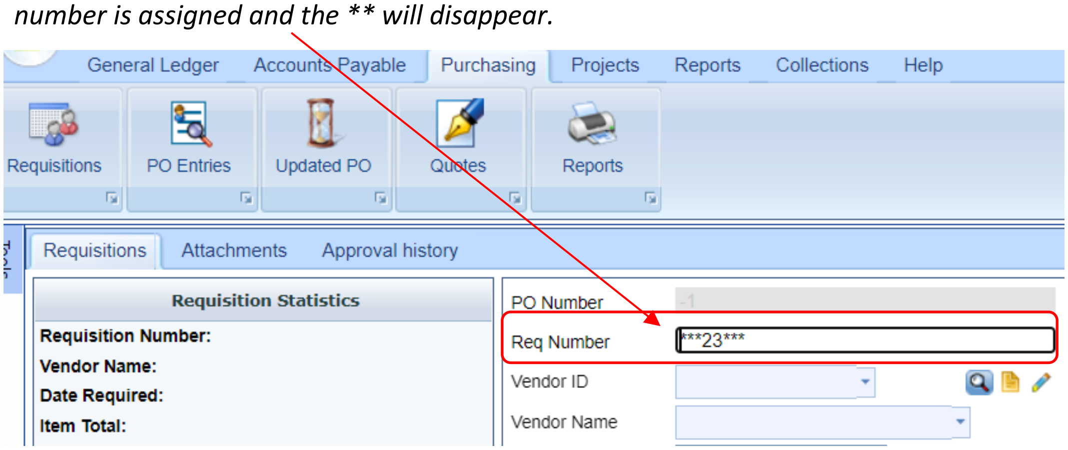
Once Requisitions is selected, a grid will display all ACTIVE requisitions (those not yet updated to Purchase Orders).

2. To create a Requisition, click on Add New Requisition



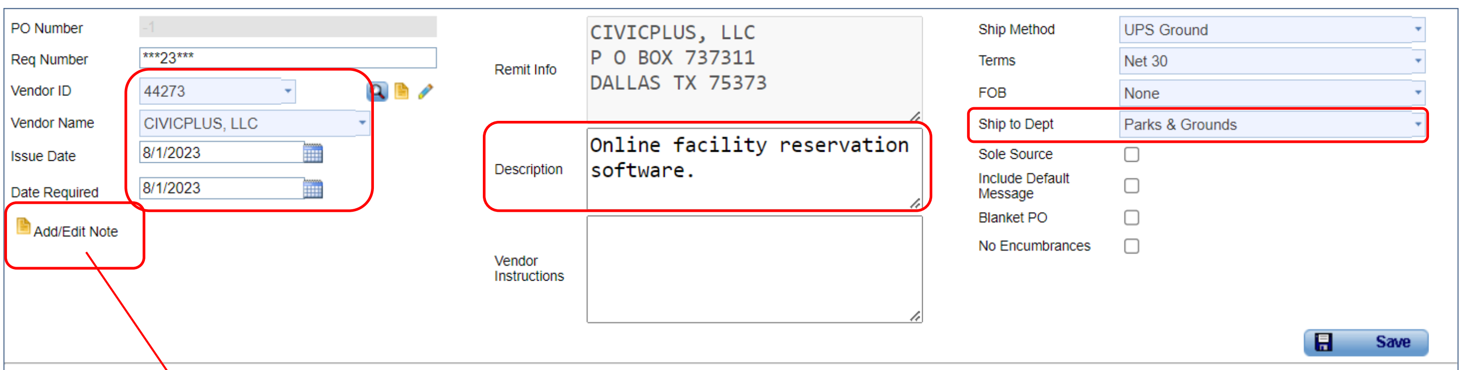
The requisition information window will appear. See instructions on page 2 for completion of the required information.

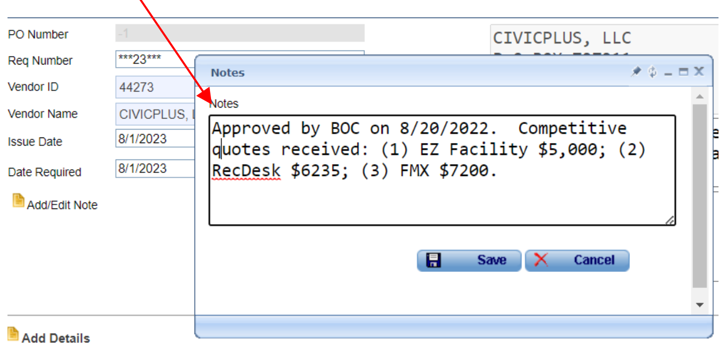
*Note: The requisition number will be displayed with **Number** until you click "Save" when the requisition number is assigned and the ** will disappear.*



On the "New Requisition" screen, enter the following information:

1. **Vendor ID or Vendor Name:** Enter a starting number in the Vendor ID or a starting letter in the Vendor Name field. The vendor name and address will auto populate the Remit Info field.
2. **Issue Date and Date Required**: These fields will default to the date you are entering the Requisition.
3. **Description Field:** Enter an overall description of the Requisition, (i.e., office supplies, cleaning supplies, etc.).
4. **Vendor Instructions**: If you are going to send the Requisition or Purchase Order to the vendor and would like to have special instructions, enter them in this field (e.g., "deliver between 2:00 – 4:00 pm).
5. **Ship to Dept:** Select your department from the drop down list. The remaining fields on the right hand side do not require an entry; however, you may choose from the available options.





Add/Edit Note: Click on the Note icon to open a text field and enter (a) Meeting date when approved by Board of Commissioners, if applicable; and (b) Information on competitive pricing obtained for this purchase/service (similar to the field on the paper form).

Click  **to close the window.**

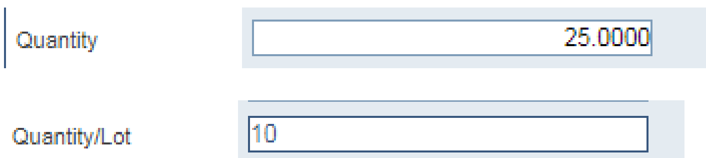
After the Add/Edit Note window closes (when used), click  on the requisition main screen.

Continued on next page.

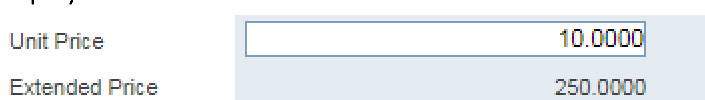
Enter General Ledger account information and line item detail(s):

After you click “Save” on the requisition main screen, a window will pop up to enable entry of the general ledger account number and line item detail.

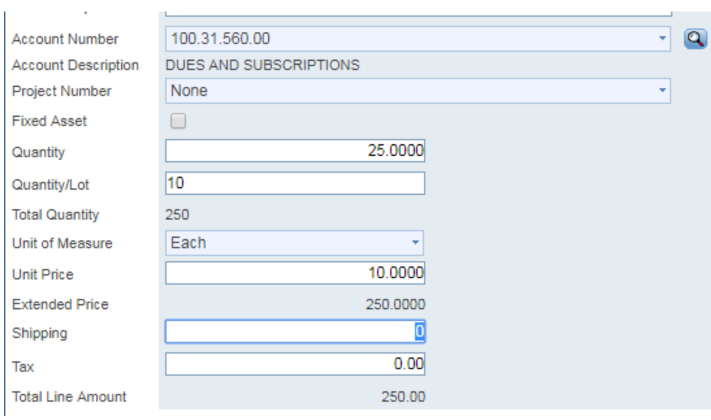
6. **Item Description**: This description should have more detail than the general description you entered on the previous screen. This description will carry to the general ledger transaction when processed.
7. **Account Number:** Click in the account number field and enter the account number, if known or use the search and select the account number by double clicking on the row.
8. **Quantity:** Enter number of items being purchased. This number will be multiplied times the Unit Price information (discussed below).
9. **Quantity/Lot:** This field determines how many units are contained within the type of item being purchased. For example, if you are purchasing a case of paper and there are 10 reams of paper in the case, you can input 10 as the number of items contained in the case. This will NOT change the total of the line item; it is an informational item so that the person receiving the order will know what to expect. This can be left blank if not used.



10. **Unit of Measure:** Select the correct type from the drop down menu.
11. **Unit Price:** This drives the total amount of the line item. If the cost of each item is $10.00 then put that amount in this field, it will be multiplied times the information in the QUANTITY field. The total will be displayed in the Extended Price field.



12. **Shipping:** Enter any additional shipping costs, if not known or there is none, then leave blank.
13. **Tax:** Enter sales tax amount, if not known or there is none, then leave blank.



The “Total Line Amount” will auto-populate with the total amount of the line item expense based on the information you entered above.

Add/Edit Notes can be added by clicking Add/Edit Note in the lower left hand corner.

Once all the information is entered for this line item, click Save . Another window will pop up to provide additional space to add other line items to the Requisition.

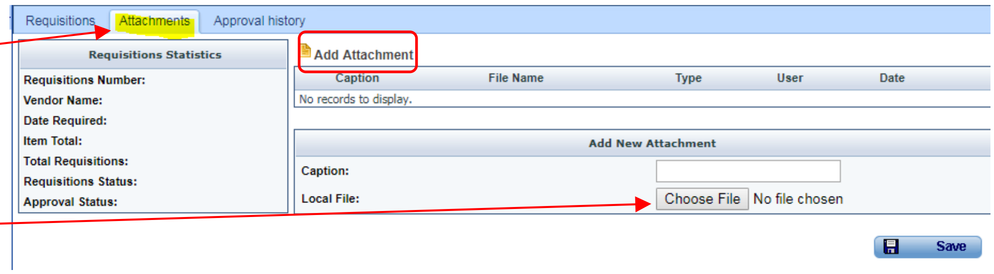
If you do not need the additional space, just click , otherwise repeat the steps above until you have finished entering all line items for this requisition.

3. Add attachments (proposal, sales order, contract, etc.).

Click on Attachments tab.

Click on "Add Attachments" icon.

Choose File to browse for the attachment.

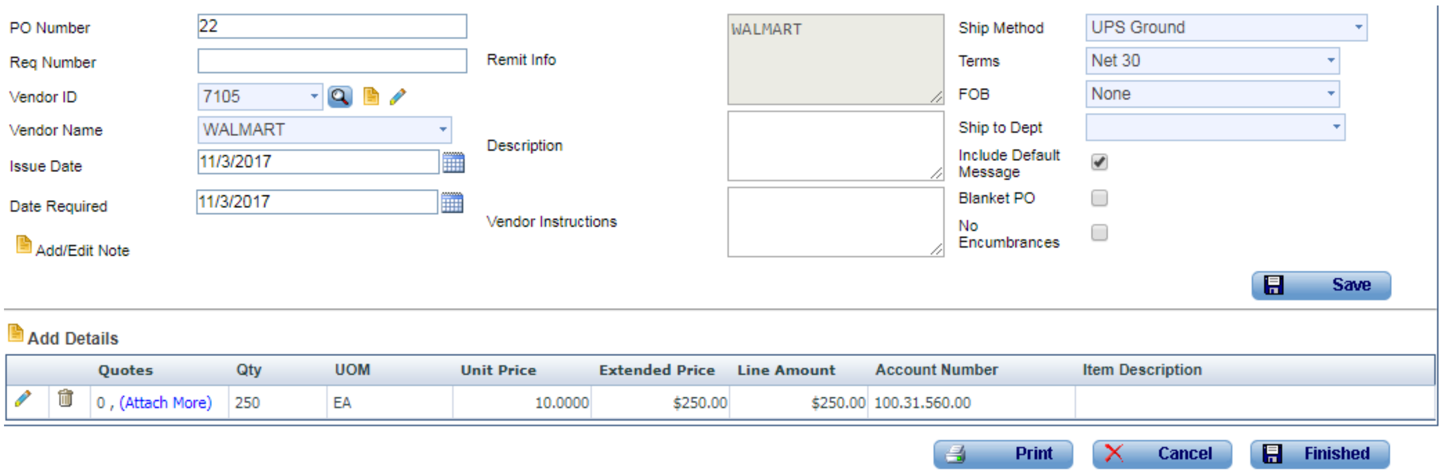


A caption can be added to describe the attachment. This can also be displayed when the Requisition is opened.

Click  and click back on Requisition Tab to return to the requisition.

When you are finished with the general ledger detail information and/or have added any attachments, the requisition information will be displayed as shown below. At this point, you can print the requisition if desired; however, the PO # field will be displayed as "Not Assigned" until the requisition is approved.

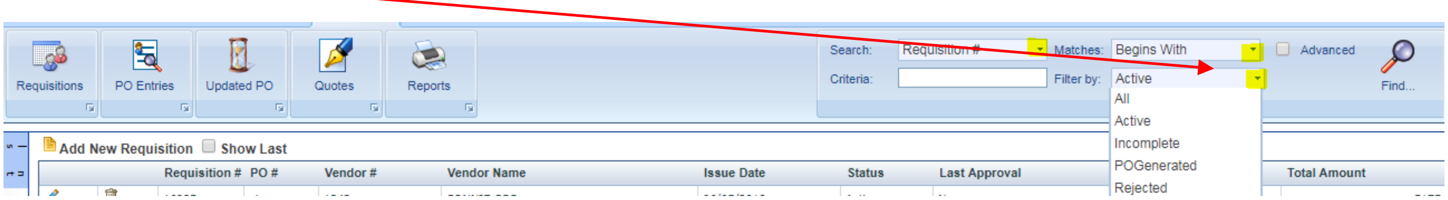
See Step 4 for instructions to view/print an approved PO.



After you reach this screen and have determined whether you want to print the unapproved requisition,

Click  . The requisitions then converts to "Active" requisition status pending approval by the finance director. Once the requisition is approved, it is considered to be an "Active" (but still unposted) Purchase Order. **You cannot go back to make any changes to the requisition after it is approved/converted to a Purchase Order.**

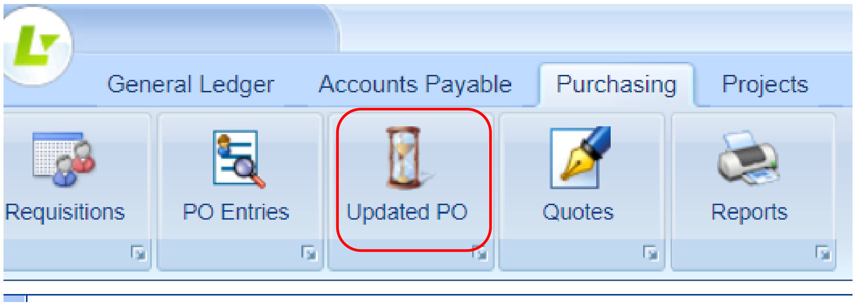
To search for a requisition by status (Active, PO Generated, etc.), click the drop down arrows to the right of the FILTER BY field on the main Requisitions screen.



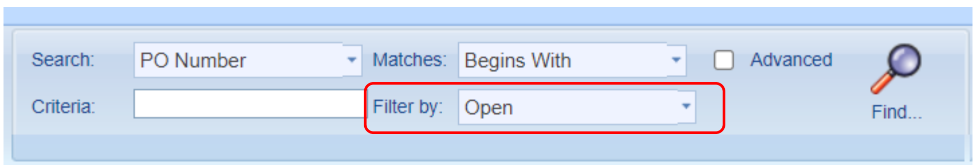
4. View/Download/Print a copy of the approved Purchase Order.

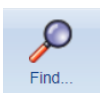
The finance director will endeavor to approve requisitions and issue purchase orders on a daily basis. *You will need to access the Purchasing module in Logics at a later time to check if the PO has been approved.*

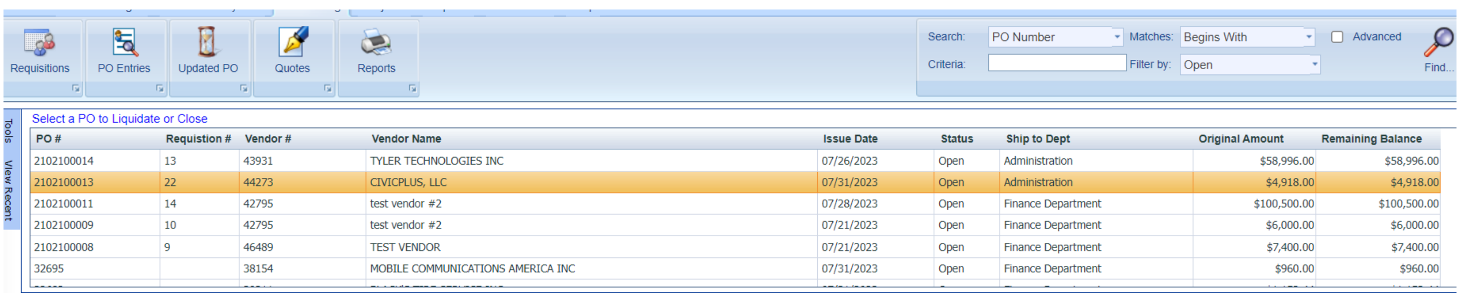
To obtain a copy of the PO and/or reference the PO number, click on **Purchasing**, then **Updated PO**.



To search for a PO by status (Open, All, Closed, etc.), click the drop down arrows to the right of the FILTER BY field.



Clicking  will populate the grid with all purchase orders filtered by the option selected. The screenshot below displays all Open purchase orders.



PO #	Requistion #	Vendor #	Vendor Name	Issue Date	Status	Ship to Dept	Original Amount	Remaining Balance
2102100014	13	43931	TYLER TECHNOLOGIES INC	07/26/2023	Open	Administration	$58,996.00	$58,996.00
2102100013	22	44273	CIVICPLUS, LLC	07/31/2023	Open	Administration	$4,918.00	$4,918.00
2102100011	14	42795	test vendor #2	07/28/2023	Open	Finance Department	$100,500.00	$100,500.00
2102100009	10	42795	test vendor #2	07/21/2023	Open	Finance Department	$6,000.00	$6,000.00
2102100008	9	46489	TEST VENDOR	07/21/2023	Open	Finance Department	$7,400.00	$7,400.00
32695		38154	MOBILE COMMUNICATIONS AMERICA INC	07/31/2023	Open	Finance Department	$960.00	$960.00

1. Click the row to highlight the PO you need.
2. Hover over the Tools side bar to extend the menu options.
3. Select **Reprint PO.**
4. The PO will open up in a separate browser window to be printed or saved to your computer.