



## **create\_requisition\_2**



## Table of Contents

|                                   |   |
|-----------------------------------|---|
| <b>create_requisition_2</b> ..... | i |
|-----------------------------------|---|



Click the **Accounts** link to select a line item. The line item is highlighted for edit and you can view or add accounts for the selected line item in the **Accounts** section (Section 3) at the bottom of the page.

|                          |  |
|--------------------------|--|
| <b>Item</b>              | The sequential number of the row is automatically populated.   |
| <b>Catalog Nbr</b>       | Type an item catalog number. This field can be a maximum of 15 characters.   |
| <b>Description</b>       | Type a short description (e.g., computer, pens, books, etc.) of the item being ordered. This field is required and can be a maximum of 30 characters.  |
| <b>Unit of Issue</b>     | Click  to select a basic unit (e.g., EA (each), CA (case)) on which the price is based.   |
| <b>Quantity</b>          | Type the quantity in units of issue for the requested item.  |
| <b>Unit Price</b>        | Type the price per unit of issue for the requested item.   |
| <b>SubTotal</b>          | The subtotal is populated based on the <b>Quantity</b> and <b>Unit Price</b> fields.   |
| <b>Commodity Code</b>    | Begin typing a commodity code or description. As you type the data, a drop-down list of corresponding data is displayed. Select the applicable commodity code. The commodity codes are maintained on the District Administration > Tables > Commodity Codes page. The commodity code can be selected and changed on a saved requisition and also by an approver once submitted.<br><br><b>Note:</b> If <b>Restrict Commodity Codes to Buyer</b> is selected on the District Administration > Options > Purchasing/Warehouse page, only buyers (i.e., <b>Buyer</b> is selected on the District Administration > Maintenance > User Profiles > Purchasing Permissions tab) can view the <b>Commodity Code</b> field. If <b>Restrict Commodity Codes to Buyer</b> is not selected, then all users can view the <b>Commodity Code</b> field. |
| <b>Discount %</b>        | If there is a discount on the line item, type the value (percent) to be reduced from the item price. The <b>Discount Amt</b> field is populated when another field is selected.  |
| <b>Discount Amt</b>      | Type a value of discount amount. The <b>Discount %</b> field is recalculated when another field is selected.   |
| <b>Freight Elig</b>      | Select if the requisition item is eligible for transportation charges and you want to include the freight cost in the requisition total. If not selected, the <b>Freight %</b> and <b>Freight Amt</b> fields are disabled.   |
| <b>Freight %</b>         | Type the percentage value of the item's purchase price for the item's transportation charges. The <b>Freight Amt</b> field is calculated and the <b>Freight Cost</b> field is adjusted when another field is selected.   |
| <b>Freight Amt</b>       | Type the freight charge amount. The <b>Freight %</b> and <b>Freight Cost</b> fields are adjusted when another field is selected.   |
| <b>Totals</b>            | The total line item value is displayed. The discount and freight amounts are included in the calculation.  |
| <b>Status</b>            | By default, this field set to <i>Y - Approved</i> . Click  to select a different requisition item status.<br><b>Notes:</b><br>If <i>Y - Approved</i> is selected, a unit price other than \$0 is required.<br>If <i>F - Free</i> is selected for goods or services being requisitioned without charge, the account code must be blank.   |
| <b>Long Description</b>  | Type a detailed item description (e.g., training dates, etc.)  |
| <b>Requisition Total</b> | The calculated total cost for each item in the requisition based on the quantity ordered and unit price per item is displayed.   |

Click **Refresh Totals** to update the totals if any amounts are changed in the grid.

The last line of the requisition displays the requisition subtotal (quantity x unit price), discount amount, freight amount, and requisition total (the total calculated requisition amount including discounts and freight amounts).

Click **+Add** to add additional line items.