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Set up District Administration purchasing options

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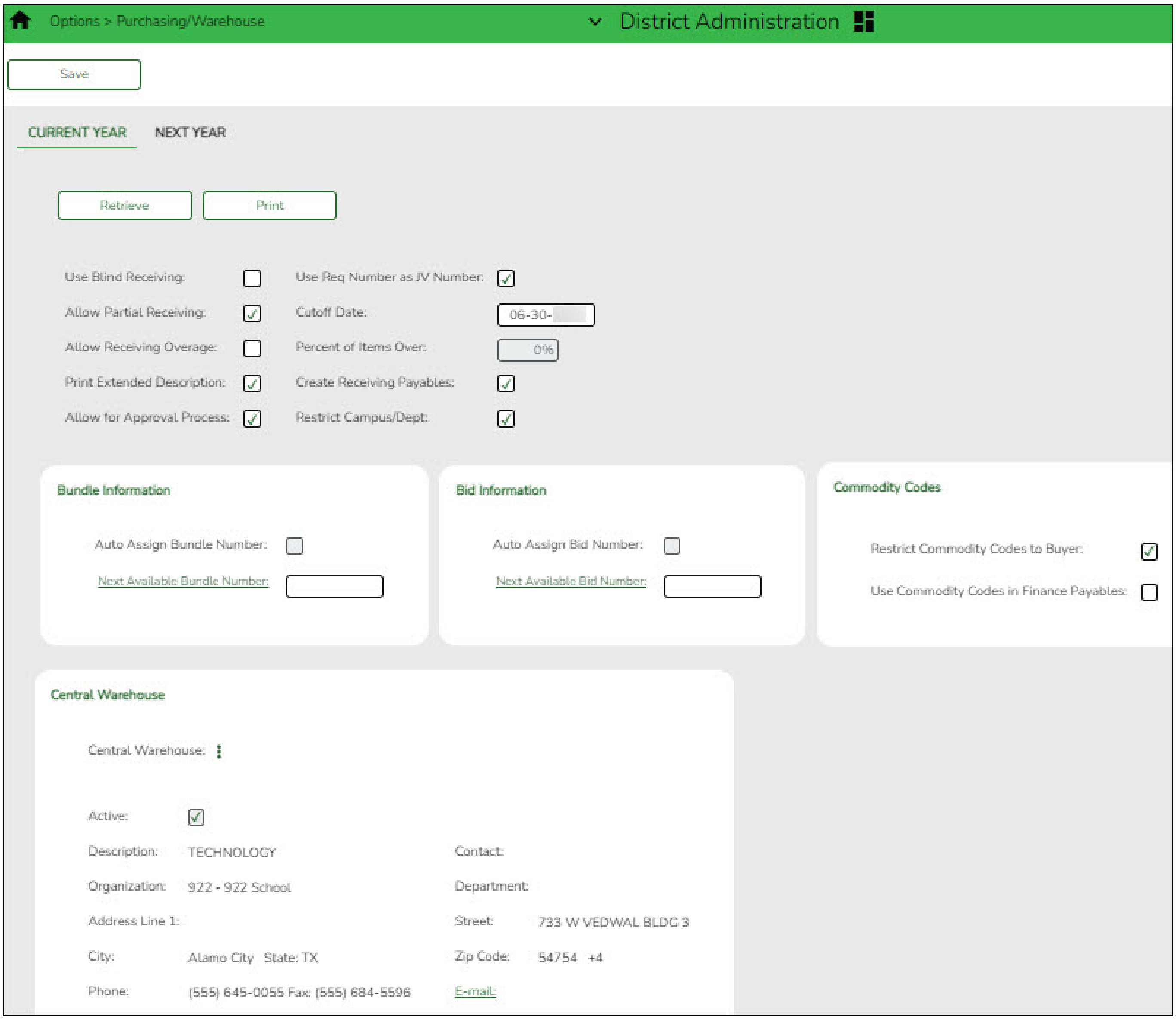
District Administration > Options > Purchasing/Warehouse > Current Year

Select the applicable options to set up purchasing tables and files for the current year. These options enable the LEA to determine how receiving is used, if requisition/purchase order numbers are automatically assigned, and if payable transactions are automatically created on the Finance > Maintenance > Pending Payables page.


Options > Purchasing/Warehouse
District Administration
Save
CURRENT YEAR
NEXT YEAR
Retrieve
Print
Bundle Information
Bid Information
Commodity Codes
Central Warehouse

Use Blind Receiving: ☐
Allow Partial Receiving: ☑
Allow Receiving Overage: ☐
Print Extended Description: ☑
Allow for Approval Process: ☑
Use Req Number as JV Number: ☑
Cutoff Date: 06-30-[redacted]
Percent of Items Over: 0%
Create Receiving Payables: ☑
Restrict Campus/Dept: ☑

Auto Assign Bundle Number: ☐
Next Available Bundle Number:
Auto Assign Bid Number: ☐
Next Available Bid Number:
Restrict Commodity Codes to Buyer: ☑
Use Commodity Codes in Finance Payables: ☐

Central Warehouse:
Active: ☑
Description: TECHNOLOGY
Organization: 922 - 922 School
Address Line 1:
City: Alamo City State: TX
Phone: (555) 645-0055 Fax: (555) 684-5596
Contact:
Department:
Street: 733 W VEDWAL BLDG 3
Zip Code: 54754 +4
E-mail:

Use Blind Receiving	Select to hide the item quantities on the Purchasing > Maintenance > Receiving > Requisition tab. If blank, the item quantities are displayed.

Use Req Number as JV Number	Select if you want to automatically populate the journal voucher numbers for general journal transactions when submitting, approving, or returning requisitions. If not selected, the journal voucher numbers for general journal transactions are populated with RQMMDD (e.g., November 12 would be RQ1112) when submitting, approving, or returning requisitions.
Allow Partial Receiving	Select to receive less than the amount ordered.
Cutoff Date	Type the final date that the requisitions can be created in the MMDDYYYY format. When the date is less than the current date, new requisitions can no longer be created. If blank, requisitions can be entered at any time.
Allow Receiving Overage	Select to receive more than the amount ordered. If selected, you have to indicate the maximum percentage of overage in the **Percent of Items Over** field. If the **Percent of Items Over** field is 100% and you ordered one item, you can receive two items.
Print Extended Description	Select to print the extended description on the purchase order forms.
Create Receiving Payables	Select to automatically create payable transactions on the Finance > Maintenance > Pending Payables page when using the receive feature. If not selected, payable transactions are not created in Finance when using the receive feature.
Allow for Approval Process	Select to use the approval process in Purchasing. If this field is not selected, the **Campus/Dept** field is not displayed on the Purchasing > Maintenance > Create/Modify Requisition page.
Restrict Campus/Dep	Select to limit the campus list to the campuses listed on the District Administration > Maintenance > User Profiles > Purchasing Restrict Campus/Dept tab. By default, this field is not selected and all first approver campuses are allowed.

❑ Under **Bundle Information**:

Auto Assign Bundle Number	Selected by default to automatically assign a bundle number when using the bundle requisitions feature. In the **Next Available Bundle Number** field, type the next bundle number to be assigned or click **Next Available Bundle Number** to populate the next available bundle number to be assigned.

❑ Under **Bid Information**:

Auto Assign Bid Number	Selected by default to automatically assign a bid number when using the bid processing feature in Purchasing. In the **Next Available Bid Number** field, type the next bid number to be assigned or click **Next Available Bid Number** to populate the next available bid number to be assigned.

❑ Under **Commodity Codes**:

Restrict Commodity Codes to Buyer	Select to restrict the use of commodity codes to only buyers (i.e., **Buyer** is selected on the District Administration > Maintenance > User Profiles > Purchasing Permissions tab). If selected, only buyers can view the **Commodity Code** field on the Purchasing > Maintenance > Create/Modify Requisition, Create/Modify Contract Requisition and Warehouse > Maintenance > Inventory Maintenance pages. If **Restrict Commodity Codes to Buyer** is not selected, then all users can view the **Commodity Code** field.
Use Commodity Codes in Finance Payables	Select to use the commodity code functionality on the Finance > Maintenance > Pending Payables page. ❑ If selected, then: • The **Actual Cost** field can be modified. • The **Net Expend Amt** field cannot be modified. • If the **Freight %** is greater than zero, then the **Freight Amt** field can be modified. If not, then the field cannot be modified. ❑ If is not selected, then: • The **Actual Cost** field cannot be modified. • The **Net Expend Amt** field can be modified. • The **Freight Amt** field cannot be modified.

❑ Under **Central Warehouse**:

Central Warehouse	Click ⋮ to select the LEA's default receiving address. You can add or edit address information on the District Administration > Tables > Receiving Addresses page. **Note**: The central warehouse address is printed in the **Ship To** field on the purchase order if the shipping addresses are different for each requisition in a bundled requisitions purchase order. In this case, you must indicate the requesting campus, department, and requestor in the line item comments on the purchase order. The line item comments are only printed on the District PO copy.

❑ Click **Save**.