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Set up District Administration purchasing options

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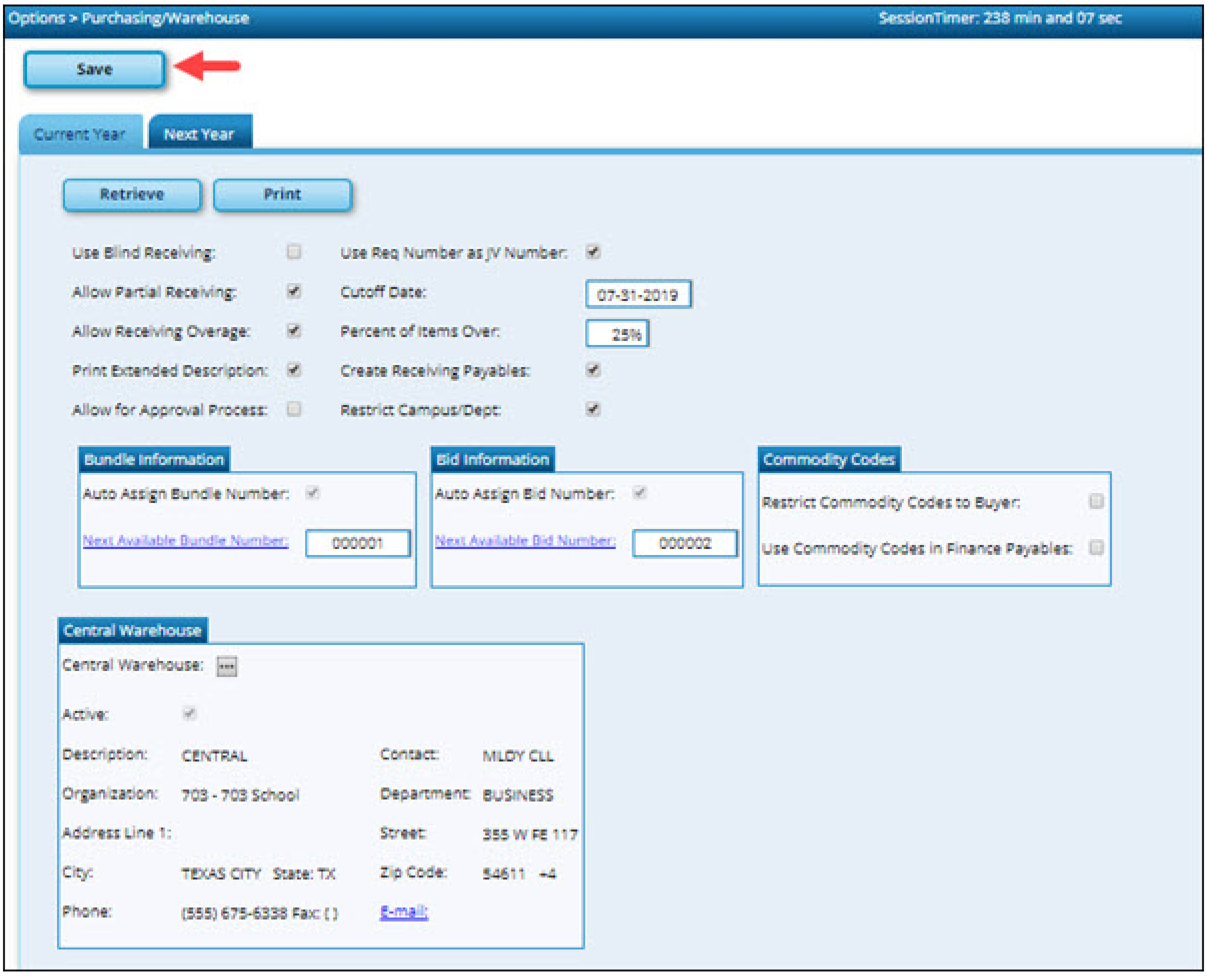
District Administration > Options > Purchasing Options > Current Year

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 and purchase order numbers are automatically assigned, and if payable transactions are automatically created on the Finance > Maintenance > Postings > Check Processing - PO page.



Use Blind Receiving: ☐
Allow Partial Receiving: ☑
Allow Receiving Overage: ☑
Print Extended Description: ☑
Allow for Approval Process: ☐
Use Req Number as JV Number: ☑
Cutoff Date: 07-31-2019
Percent of Items Over: 25%
Create Receiving Payables: ☑
Restrict Campus/Dept: ☑

Auto Assign Bundle Number: ☑
Next Available Bundle Number: 000001

Auto Assign Bid Number: ☑
Next Available Bid Number: 000002

Restrict Commodity Codes to Buyer: ☐
Use Commodity Codes in Finance Payables: ☐

Central Warehouse:
Active: ☑
Description: CENTRAL
Contact: MLDY CLL
Organization: 703 - 703 School
Department: BUSINESS
Address Line 1:
Street: 355 W FE 117
City: TEXAS CITY State: TX
Zip Code: 54611 +4
Phone: (555) 675-6338 Fax: ( )
E-mail:

Use Blind Receiving	Select to conceal quantities ordered on the requisition on the Purchasing > Maintenance > Receiving > Requisition page. If blank, the quantities ordered on the requisition are not concealed.
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 a payable transaction on the Finance > Maintenance > Postings > Check Processing - PO page when using the receiving feature. On the Finance > Maintenance > Postings > Check Processing - PO page, the payable transaction displays in the detail portion of the page. You cannot modify the amount, but you can add the invoice number and date, and click **Print** when you are ready to include this transaction when processing vendor checks. If the option is not selected, the payable transaction is not created in Finance when using the receiving 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 page. If **Restrict Commodity Codes to Buyer** is not selected, then all users can view the **Commodity Code** field on the Purchasing > Maintenance > Create/Modify Contract Requisition page.

Use Commodity Codes in Finance Payables	(**Coming soon in a future release**.) Select to use commodity codes in Finance payables.

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**.