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# Purchasing/Warehouse (Current Year) - DA2010

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# Purchasing/Warehouse (Current Year) - DA2010

***District Administration > Options > Purchasing/Warehouse***

This page is used to select the options used 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 > Pending Payables page.

## Set requisition options:

| Field | Description |
|---|---|
| **Use Blind Receiving** | Select to conceal quantities ordered on the requisition on the Maintenance Receive PO Items page in Purchasing. Leave the field blank if you do not want to conceal quantities ordered on the requisition. |
| **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 the option is 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 no date is entered, requisitions can be entered at any time. |
| **Allow Receiving Overage** | Select to receive more than the amount ordered. If the field is 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 receiving feature.<br>If not selected, payable transactions are not created in Finance when using the receiving feature.<br>**Note**: For bundled requisitions, the payable transaction is created on the Finance > Maintenance > Postings > Check Processing - PO tab. |
| **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 Maintenance > Create/Modify Requisition page in Purchasing. |

| Field | Description |
|---|---|
| **Restrict Campus/Dep** | Select to limit the campus list to the campuses listed on the 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.<br>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**:

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|---|---|
| **Auto Assign Bid Number** | Selected by default to automatically assign a bid number when using the bid processing feature in Purchasing.<br>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**:

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|---|---|
| **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.<br>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.<br>❑ If selected:<br>• The **Actual Cost** field can be modified.<br>• The **Net Expend Amt** field cannot be modified.<br>• If the **Freight %** is greater than zero, then the **Freight Amt** field can be modified. If not, then the field cannot be modified.<br>❑ If not selected:<br>• The **Actual Cost** field cannot be modified.<br>• The **Net Expend Amt** field can be modified.<br>• The **Freight Amt** field cannot be modified. |

Under **Central Warehouse**:

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|---|---|
| **Central Warehouse** | Click ⋮ to select the default receiving address for the LEA. You can add or edit address information on the Tables > Receiving Addresses page.<br>**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, the user 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**.

## Other functions and features:

| | |
|---|---|
| **Retrieve** | Click to retrieve information from the last save. If you click **Retrieve**, any unsaved changes will be lost. |
| **Print** | Click to print the LEA's purchasing options for the current year.<br>Review the report. |