



Set up Finance purchasing options

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Under **Purchasing Options**, complete the following fields:

The screenshot shows the 'District Finance Options' screen with the 'Finance Options' tab selected. The 'Purchasing Options' section is highlighted with a callout box. The fields in this section include:

- PO Object Code Restriction: A dropdown menu showing 'A - Class 1XXX, 2XXX, 6XXX and 8XXX' with a checked checkbox.
- Print Federal ID Number on PO: A checked checkbox.
- Use Automatic CYR Requisition Number Assignment: A checked checkbox.
- Next Available CYR Requisition Number: A text box containing '366723'.
- Use Automatic NYR Requisition Number Assignment: A checked checkbox.
- Next Available NYR Requisition Number: A text box containing '000005'.
- Use Automatic CYR PO Number Assignment: A checked checkbox.
- Next Available CYR PO Number: A text box containing '173147'.
- Use Automatic NYR PO Number Assignment: An unchecked checkbox.
- Next Available NYR PO Number: A text box containing '000001'.
- Reset Approval Path Purchasing: An unchecked checkbox.

PO Object Code Restriction	Click ▼ to select the allowed range of object codes to be used on requisitions. Only account codes with object codes in the selected range are allowed. <ul style="list-style-type: none"> • <i>R - Class 62XX-64XX and 66XX</i> • <i>E - Class 6XXX and 8XXX</i> • <i>A - Class 1XXX, 2XXX, 6XXX and 8XXX</i> • <i>C - Class 1XXX, 2XXX, 62XXX-64XX and 66XX</i> If an account code entered on a requisition does not meet the selected criteria, an error message is displayed.
Print Federal ID Number on PO	Select to print the federal ID number on purchase orders in Purchasing. If blank, the federal ID number is not printed on purchase orders.

Use Automatic CYR Requisition Number Assignment	<p>This field automatically assigns the next available current year (CYR) requisition number.</p> <p>Select to automatically populate the Next Available CYR Requisition Number field with the last number used plus one.</p> <p>Click Next Available CYR Requisition Number to populate the Next Available CYR Requisition Number field with the last number used plus one.</p> <p>Note: If the requisition number has reached the maximum number (e.g., 999999), then the number is reset to 000001 and searches for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the following message is displayed: "All available requisition numbers are used."</p>
Use Automatic NYR Requisition Number Assignment	<p>This field automatically assigns the next available next year (NYR) requisition number.</p> <p>Select to automatically populate the Next Available NYR Requisition Number field with the last number used plus one.</p> <p>Click Next Available NYR Requisition Number to populate the Next Available NYR Requisition Number field with the last number used plus one.</p> <p>Note: If the requisition number has reached the maximum number (e.g., 999999), then the number is reset to 000001 and searches for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the following message is displayed: "All available requisition numbers are used."</p>
Use Automatic CYR PO Number Assignment	<p>This field automatically assigns the next available current year (CYR) purchase order (PO) number.</p> <p>Select to automatically populate the Next Available CYR PO Number field with the last number used plus one.</p> <p>Click Next Available CYR PO Number to populate the Next Available CYR PO Number field with the last number used plus one.</p> <p>Note: If the purchase order number has reached the maximum number (e.g., 999999), then the number is reset to 000001 and searches for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the following message is displayed: "All available purchase order numbers are used."</p>
Use Automatic NYR PO Number Assignment	<p>This field automatically assigns the next available next year (NYR) purchase order (PO) number.</p> <p>Select to automatically populate the Next Available NYR PO Number field with the last number used plus one.</p> <p>Click Next Available NYR PO Number to populate the Next Available NYR PO Number field with the last number used plus one.</p> <p>Note: If the purchase order number has reached the maximum number (e.g., 999999), then the number is reset to 000001 and searches for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the following message is displayed: "All available purchase order numbers are used."</p>

Reset Approval Path Purchasing	<p>Select to reset the approval path of a requisition when the amount or account is changed by an approver during the approval process.</p> <p>If selected and changes are made to a requisition, the requisition is automatically returned to the originator and must be resubmitted by the originator. After the requisition is resubmitted, it must go through the approval path again. When a change is made, an email message is sent to the originator.</p> <p>If not selected, changes are allowed by the approver and the requisition continues through the approval path.</p>
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