



## **Bundle Requisitions - REQ3220**



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# Bundle Requisitions - REQ3220

**Purchasing > Maintenance > Bundle Requisitions**


This page allows approvers in the Purchasing approval path to bundle (i.e., group) multiple requisitions to the same vendor into a single purchase order. If you are the final approver in the approval path, you can bundle requisitions and approve the bundle. In addition, this page can be used to return or approve a single requisition.

Only users who have been granted access on the Maintenance > User Profiles > Purchasing Permissions tab in District Administration can bundle requisitions. If the user does not have access, the **Save Bundle Requisition** and **Approve Bundle Requisition** buttons are not displayed.

**Bundle requisitions:**

|                                     |   |  |  |
|-------------------------------------|---|--|--|
| <b>Retrieve an existing record.</b> | <a href="#">Search for a record.</a>  |  |  |
|                                     | Under <b>Retrieve By:</b>   |  |  |
|                                     | <b>Requisition Nbr</b>  | Select to perform a search using the requisition number. If selected, the following is displayed under <b>Retrieval Options:</b>                               |  |
|                                     |   | <b>Req Nbr</b>   | Type the six-digit requisition number.                 |
|                                     |   | <b>From Date</b>   | Type the beginning search date in the MMDDYYYY format. |
|                                     |   | <b>To Date</b>   | Type the ending search date in the MMDDYYYY format.    |
| <b>Requestor</b>                    |   | Type the requestor for the requisition.  |  |
|                                     | <b>Vendor</b>   | Begin typing the vendor name or number. As you type the data, a drop-down list of corresponding data is displayed. Select a vendor and click <b>Retrieve</b> . |  |
| <b>Bundle Nbr</b>                   | Select to perform a search using the requisition bundle number. If selected, the following is displayed under <b>Retrieval Options.</b> |  |  |
|                                     | <b>Bundle Nbr</b>   | Type the requisition bundle number and click <b>Retrieve</b> .   |  |

Under **Requisition Information:**

- Click  to view the account details associated with the individual item. The details are displayed in the bottom grid.
- Click **View** to view the requisition details. The requisition information is displayed. Refer to [Create/Modify Requisition](#) to make any changes.
- Make the necessary changes, click **Modify**, and then **Close** to close the window and return to the Bundle Requisitions page. Otherwise, click **Close** to return to the Bundle Requisitions page. If changes are made to a requisition, the **View** button changes to **Modified** for that requisition.

Select the requisitions to be included in the bundle. Or, select a single requisition to approve or return.

|  |  |
|--|--|
| <p><b>Save Bundle Requisitions</b></p>   | <p><a href="#">Click to bundle and save the selected requisitions.</a></p> <p><input type="checkbox"/> Click <b>Save Bundle Requisitions</b> to bundle and save the selected requisitions. The Bundle Requisitions report is displayed. <a href="#">Review the report.</a></p> <p><input type="checkbox"/> Click <b>Process</b> to continue. A message is displayed with the bundle number and prompts you to print the Purchasing Requisition Report.</p> <ul style="list-style-type: none"> <li>•</li> </ul> <p>Click <b>Yes</b> to print the report. <a href="#">Review the report.</a></p> <ul style="list-style-type: none"> <li>•</li> </ul> <p>Click <b>No</b> to continue.</p> <p><input type="checkbox"/> Click <b>Cancel</b> to continue and return to the Bundle Requisitions page.</p> |
| <p><b>Approve Bundle Requisition</b></p> | <p><a href="#">Click to approve the requisition bundle.</a></p> <p><input type="checkbox"/> Click <b>Approve Bundle Requisition</b> to approve the requisition bundle. The Bundle Requisitions report is displayed. <a href="#">Review the report.</a></p> <p><input type="checkbox"/> Click <b>Process</b> to continue. A message is displayed with the bundle and purchase order number and prompts you to print the Purchasing Requisition Report.</p> <ul style="list-style-type: none"> <li>•</li> </ul> <p>Click <b>Yes</b> to print the report. <a href="#">Review the report.</a></p> <ul style="list-style-type: none"> <li>•</li> </ul> <p>Click <b>No</b> to continue.</p> <p><input type="checkbox"/> Click <b>Cancel</b> to continue and return to the Bundle Requisitions page.</p>  |

**Other functions and features:**

|                                   |   |
|-----------------------------------|---|
| <p><b>Return Requisition</b></p>  | <p>Click to return a requisition to the originator.</p>                           |
| <p><b>Approve Requisition</b></p> | <p>Click to approve a requisition. The Approve Requisition page is displayed.</p> |



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