How To Enter A Purchase Requisition (Business PLUS)

**Step 1:** Once you are logged into BusinessPLUS, click on the ‘Purchasing’ tab at the top of the page. A blue tab indicates the current selected page.

**Step 2:** In the center of the screen, click on ‘Entering Purchase Requisitions- POUPPR’.
Step 3: A new window should pop up. This is your new POUPPR screen. It may take a few seconds to fully load.

If the system is still loading or processing the current task, it will display the status here.

Step 4: At the top of the screen, click on the green ‘+’ icon to go to Add Mode.
**Step 5:** Make sure you are in “Add Mode”. Click on the *ellipsis* (...) next to “PR” and select “Auto [PR.K]”.

![Image of software interface with highlighted 'Add Mode' button]

**Step 6:** Next, type in the Vendor ID. If you don’t know the Vendor ID, click on the *ellipsis* (...) and click ‘Lookup’. A Screen should pop up. Enter your search and **double click** to select your vendor.

![Image of software interface with highlighted 'Lookup' button]

*Note:* *double click* to select.
**Step 7:** On the same page, enter the rest of the information. Required fields for PR’s are:

- **By** (your name)
- **End Use** (end user’s name)
- **Buyer** (Jonathan- B7800002, Kathy- B7800003, Honami- B7800005)

![Image of PR form with fields highlighted]

**Step 8:** Next, click on the ‘Ship’ tab at the top. Enter your Site Code (S78____), or click the ellipsis (...) to look it up.

![Image of Site Code lookup]

**Note:** To Search your Site Code, type in “NMUSD [site name]”.

The search results should automatically appear.

*double click* to select your school site. (Odd# = warehouse, Even# = direct to site)
**Step 9:** Hit ‘Enter’ to save the header information. A green message at the top of the screen should read, “Record Accepted”.

**Step 10:** Moving on to the bottom half of the page, begin entering the items. Required fields include:

- Quantity
- Unit Price
- Units (EA, BX, PKG, etc. You can click the dropdown menu for a list of options.)
- Account #
- Catalog # (vendor item number)
- Description (description of the item)

In order to find all these fields, use the scroll bar and drag it across (see screenshot on the next page).
**Step 11:** If you want to add any additional notes, click on the ‘Notes’ tab.

![Image of the 'Notes' tab]

**Note:**

- **PR Notes:** will not print on PO.
- **Print Before:** will print before Item 1.
- **Print After:** will print after last entered item.

**Step 12:** Press Shift + Enter to save the notes. **(WARNING: This will only save the notes.)**

**Step 13:** Click Back to the ‘Items’ tab and hit ‘Enter’ to save the entire requisition. A green message at the top of the screen should read, “Record Accepted”.

![Image of the 'Items' tab and the green message]
**Step 14:** Give the system a few seconds/minutes to process the new requisition. Lastly, click on ‘Workflow’ located on the left hand side of the screen. If needed, click ‘Refresh’ or hit ‘F5’ so that your new PR shows up in your queue. Click the **green arrow button** to approve your requisition.