

Business Plus
How to Generate
a
Purchase Request
(PR)

1. Click and Login to Business

Note: Icon located on your computer desktop



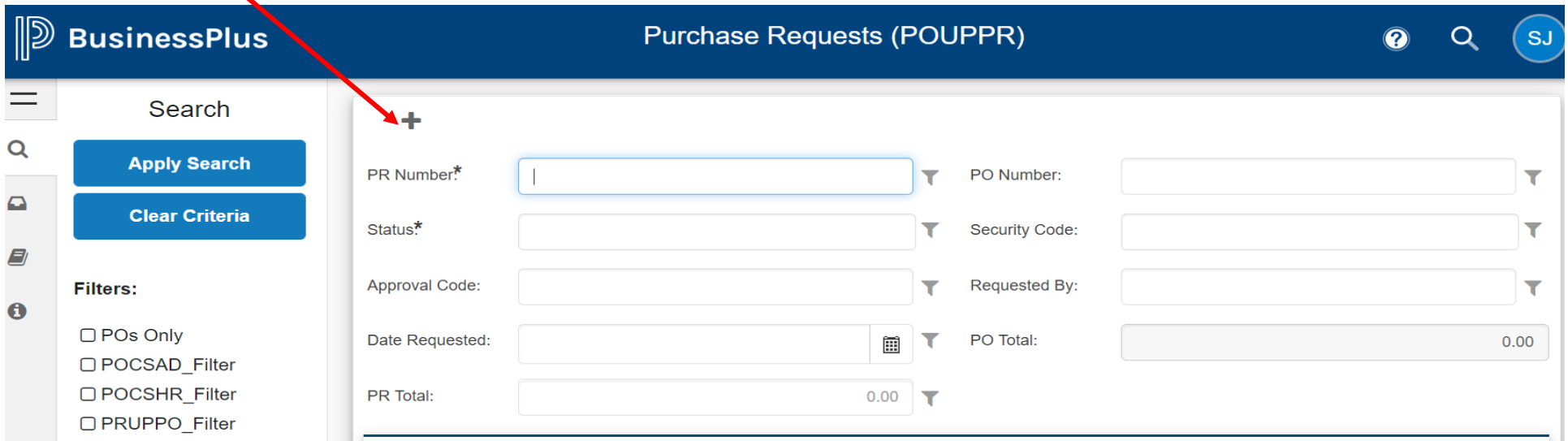
2. Click **BOOKKEEPER/SECRETARIES** tab

A screenshot of the BusinessPlus web application interface. The top navigation bar is dark blue with the BusinessPlus logo on the left and user initials 'SJ' in a circle on the right. Below the navigation bar, the main content area is titled 'Sheila Jones's Personal Dashboard'. A horizontal menu contains several tabs: 'Sheila Jones's Personal Dashboard' (which is underlined and highlighted), 'BOOKKEEPER/SECRETARIES', 'FINANCE', 'FIXED ASSETS READ ONLY', 'PURCHASING', and 'ACCOUNTS PAYABLE STAFF'. A red arrow points from the text 'BOOKKEEPER/SECRETARIES' in the previous step to this tab. Below the tabs, there is a section titled 'Go to Workflow Tasklist' with the text 'No tasks' and a refresh icon. At the bottom, it says 'Refreshed at Friday, July 29, 2022 10:04:32' and has an 'In Office' toggle switch.

3. Click **POUPPR** – to create a Purchase Requests

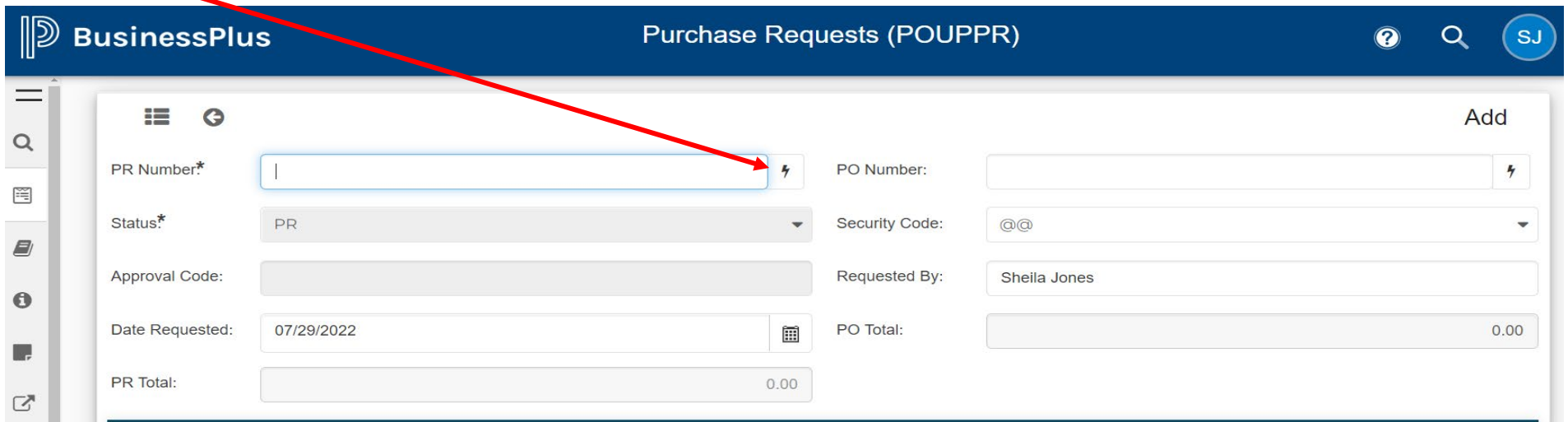
The screenshot shows the BusinessPlus interface. At the top left is the BusinessPlus logo. Below it is a 'Menu' button. The main header area is titled 'BOOKKEEPER/SECRETARIES'. Underneath, it says 'Sheila Jones's Personal Dashboard' and 'BOOKKEEPER/SECRETARIES'. A section titled 'Go to Workflow Tasklist' displays 'No tasks' and a refresh timestamp of 'Refreshed at Friday, July 29, 2022 10:11:13'. Below this is a 'PURCHASING' section with a refresh, help, and up arrow icon. It contains two links: 'POUPPR Purchase Requests' and 'POUPRC Receiving Information'. A red arrow points from the text 'Click POUPPR' in the instruction above to the 'POUPPR Purchase Requests' link.

4. Click the **Plus Symbol**



The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). The header includes the BusinessPlus logo, the title "Purchase Requests (POUPPR)", and user initials "SJ". A search sidebar on the left contains "Apply Search" and "Clear Criteria" buttons, and a "Filters" section with checkboxes for "POs Only", "POCSAD_Filter", "POCSHR_Filter", and "PRUPPO_Filter". The main form area has a plus sign (+) in the top left corner, which is highlighted by a red arrow. Below the plus sign are input fields for "PR Number*", "Status*", "Approval Code:", "Date Requested:" (with a calendar icon), and "PR Total:" (displaying "0.00"). To the right are fields for "PO Number:", "Security Code:", "Requested By:", and "PO Total:" (displaying "0.00").

5. A **Lightning Bolt** will appear.



The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR) after a search. The header is the same as in the previous screenshot. The search sidebar is now collapsed. The main form area has a "Add" button in the top right corner. The "PR Number*" field is highlighted with a blue border and contains a lightning bolt icon (⚡), which is pointed to by a red arrow. The "Status*" field is a dropdown menu with "PR" selected. The "Date Requested:" field contains "07/29/2022". The "Requested By:" field contains "Sheila Jones". The "PR Total:" field displays "0.00".

6. Click Lightning Bolt and **PR.SEED** will appear – Click PR.SEED to generate PR number (**Please make a note of PR number**).

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). The PR Number field has a lightning bolt icon next to it. A dropdown menu is open, showing 'PR.SEED'. Other fields include Status (PR), PO Number, Approval Code, Requested By (Sheila Jones), Date Requested (07/29/2022), PO Total (0.00), and PR Total (0.00).

7. Tab over to **Security Code** and enter or search (click on **drop down arrow** to search) for your School or Department Code in the Security Code box (Example: **Purchasing 0904**). **Click** on the Code and your Security Code will generate in the box.

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR) with the Security Code dropdown menu open. The dropdown menu contains a search bar with '090' and a list of codes and descriptions:

Code	Description
0903	Chief of Staff
0904	Purchasing
0905	Certified Personnel
0906	Information Technology
0907	Auditing Dept
0908	Payroll Dept
0909	Title 1

Other fields in the form include PR Number, PO Number, Status (PR), Approval Code, Requested By (Sheila Jones), Date Requested (07/29/2022), PO Total (0.00), PR Total (0.00), Vendor ID, Vendor Name, Vendor Addr Code, and Phone Cd.

8. Click in the **Vendor ID** Box. If you do not know the vendor's ID. Click on the **records icon** to search.

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). The header includes the BusinessPlus logo, the title "Purchase Requests (POUPPR)", and user initials "SJ". A sidebar on the left contains navigation icons. The main form area is divided into several sections:

- Top Section:** Includes fields for PR Number*, PO Number*, Status* (set to PR), Security Code (0904), Approval Code, Requested By (Sheila Jones), Date Requested (07/29/2022), PO Total (0.00), and PR Total (0.00).
- Vendor Information Section:** Contains fields for Vendor ID, Vendor Name, Vendor Addr Code, and Phone Cd. A red arrow points to the Vendor ID field, and another red arrow points to the records icon (a small document with a magnifying glass) next to it.
- Remit To Information Section:** Contains fields for Remit To ID, Remit To Addr Code, and Phone Cd.

9. **Type** the name of the vendor in the **Name** box and press Enter. Once you have found the correct vendor. Click **OK**.

Data Lookup

Search ID Source:

PE ID	Name	Security CD	Pedb Code
<input type="text"/>	<input type="text" value="Amazon"/>	<input type="text"/>	
V012500	Amazon Capital Services INC	VENDOR	P

No items to display

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City
P1	PO Box 81207				SEATTLE
R1	P O BOX 035184				SEATTLE

10. The vendor **ID and Name** will appear.

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). The form contains several fields for data entry. Two red arrows originate from the text '10. The vendor ID and Name will appear.' and point to the 'Vendor ID' and 'Vendor Name' fields respectively.

Field	Value
PR Number*	
Status*	PR
Approval Code:	
Date Requested:	07/29/2022
PR Total:	0.00
PO Number:	
Security Code:	0904
Requested By:	Sheila Jones
PO Total:	0.00
Vendor ID:	V012500
Vendor Name:	AMAZON CAPITAL SERVICES INC
Vendor Addr Code:	P1
Address:	PO Box 81207 SEATTLE, WA 98108
Phone Cd:	P1 8882832209

11. Click in the **Buyer** Code box and enter the Buyer's Code. These codes are shown in the chart on the next page or Bid List Book.

BusinessPlus Purchase Requests (POUPPR) ? Q SJ Add

PR Number*: PO Number: Status*: PR Security Code: 0904

Approval Code: Requested By: Sheila Jones Date Requested: 07/29/2022

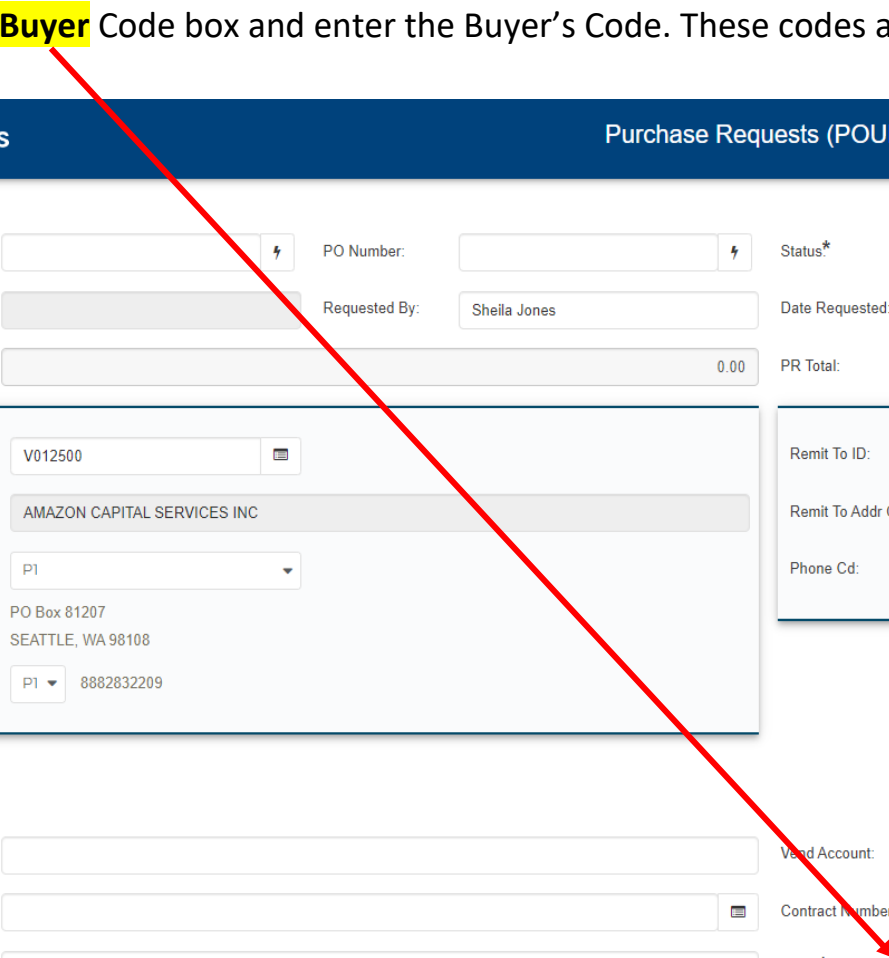
PO Total: 0.00 PR Total: 0.00

Vendor ID: V012500
Vendor Name: AMAZON CAPITAL SERVICES INC
Vendor Addr Code: P1
PO Box 81207
SEATTLE, WA 98108
Phone Cd: P1 8882832209

Remit To ID:
Remit To Addr Code:
Phone Cd:

Details

Confirm: Vendor Account:
Bid Number: Contract Number:
End Use: Buyer*:
Discount Terms: PO Type*: P



BUYER CODES

<u>CODE</u>	<u>DESCRIPTION</u>	<u>BUYER</u>
B05000	Art Equipment & Supplies	Shari Foreman
B80500	Athletic/Physical Education Equip & Supplies	Scott Sullivan
B88000	Audio Visual Equipment and Supplies	Scott Sullivan
B16500	Cafeteria Equipment & Supplies	Audrey Ferguson
B42008	Cafeteria Furniture	Audrey Ferguson
B78500	Classroom Equipment & Supplies	Shari Foreman
B20450	Computer Software & Licensing	Shavonda Scott
B20400	Computer/Technology Equipment & Supplies	Shavonda Scott
B98600	Construction Projects	Shavonda Scott
B92400	Consultants & Professional Services	Shavonda Scott
B38000	Food (Child Nutrition Only)	Audrey Ferguson
B38500	Food (Non-Child Nutrition)	Shavonda Scott
B42000	Furniture - All	Scott Sullivan
B48500	Janitorial & Maintenance Supplies	Scott Sullivan
B82000	Large Equipment Machines & Engines	Scott Sullivan
B71510	Library Books & Subscriptions	Shari Foreman
B52500	Library Equipment & Supplies	Shari Foreman
B82500	Maintenance Agreements/Service (Non-Office Equip)	Scott Sullivan
B58000	Music & Stage Equipment & Supplies	Shari Foreman
B62000	Office & Printing Supplies	Scott Sullivan
B60000	Office Equipment & Machines	Scott Sullivan
B50000	Personnel Uniforms Equipment & Supplies	Shari Foreman
B49500	Science Equipment & Supplies	Shari Foreman
B71500	Text- & Workbooks Teaching Materials & Supplies	Shari Foreman
B71517	Textbooks (State Textbooks ONLY)	Shari Foreman
B07000	Vehicles & Transportation Parts & Supplies	Shari Foreman
B92500	Memberships & Professional Registrations	Scott Sullivan

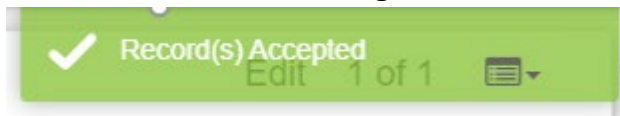
12. Enter the **Ship to ID** in the box. This will be your School or Department Code preceded by an **S** (Example: **S0904**).

The screenshot shows the BusinessPlus Purchase Requests (POUPPR) form. The form is divided into several sections: End Use, Discount Terms, Requisition Codes, Dates, Blanket, and Ship/Bill To information. A red arrow points to the 'Ship To ID' field in the bottom left section. The 'Ship To ID' field is currently empty. The 'Bill To ID' field is populated with 'S9999'. The 'Accounting Accounts Payable' dropdown is set to 'Accounting Accounts Payable'. The 'Entry Dt' is '07/29/2022'. The 'Blanket Amt' is '0.00' and the 'Rm' is '0.00'. The 'Phone Cd' is a dropdown menu.



Do Not Proceed Until you **Press Enter To SAVE.**

You will receive a message



13. Enter the **Quantity**, **Units** (Click on drop down arrow), & **Unit Price ONLY**.

The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). The 'Other Information' section includes fields for Approved By, Date Approved, Printed By, Date Printed, Encumber PO?, EN Division, Print Format, Category Code, Currency, and Text File. The 'Items' section has fields for Item Number (0001), Vendor Item No., Product Code, Quantity (0.00), Units (dropdown), Unit Price (0.00000), Extended Amt. (0.00), and Catalog Number. The 'Item Description' section is a large text area. Red arrows point from the instruction text to the Quantity, Units, and Unit Price fields. Black arrows point from the instruction text to the Product Code and Catalog Number fields.

14. Enter the **Product code** or **Catalog number** and the **Description** of the item you are purchasing in the **Item Description** Box **ONLY**.

IMPORTANT NOTE: **DO NOT ENTER** the **Product code** or **Catalog number** in the areas designated above. Enter it **ONLY** in the Item Description Box.

15. Enter the **Account** information in the **FYC** (Example: 100000904) **OBJECT** (Example: 52520510)

The screenshot displays the BusinessPlus Purchase Requests (POUPPR) interface. At the top, the header includes the BusinessPlus logo, the title 'Purchase Requests (POUPPR)', and user initials 'SJ'. Below the header, there are several input fields for item details: Item Number (0001), Vendor Item No., Product Code, Quantity (1.00), Units, Unit Price (0.00000), Extended Amt (0.00), and Catalog Number. A section titled 'Item Description' is present but empty. At the bottom of the form, there is a '+ Add Account' button and a 'Switch to: Amount' button. To the right, it shows 'Total: 100.00%' and 'Remaining: 0.00%'. Below this is a table with columns for 'Account' and 'Percent'. The table has a header row and one data row. The data row contains the following information:

Account						Percent
GL	FYC	OBJECT	EI	FYCE EIC	EIC OBJ	100.00

Red arrows point from the text in step 15 to the 'Account' column header, the 'FYC' field, and the 'OBJECT' field in the table.

16. Click any where outside of the **OBJECT** box to remove the blue frame and Press Enter to Save.

17. If you have more lines to add to your PR. Follow the directions shown on numbers 13 & 14. You should not have to enter the Account Information again. If the account information is not shown re-enter.

18. Once you have completed adding all of the items you wish to purchase.

19. You will submit your PR into Business Plus workflow.

20. Click the Pending Task aka workflow icon.



BusinessPlus Purchase Requests (POUPPR) ? Q SJ

Dates

Required Dt: Expiration Dt: Entry Dt: 07/29/2022 Expected Dt:

Delivery Dt:

Blanket

Blanket No: Blanket Amt: 0.00 Rm: 0.00

Ship To ID: S0904

Purchasing Department

Ship To Addr Code: PR

Caddo Parish School Board
1961 Midway Avenue
SHREVEPORT, LA 71108

Phone Cd:

Bill To ID: S9999

Accounting Accounts Payable

Bill To Addr Code:

Phone Cd:

Other Information

Approved By: Date Approved: Printed By: Date Printed:

21. This will open your ability to submit your PR into workflow. If workflow does not look as shown. Click the **white dropdown arrow** shown beside the **Purchase Doc tab** and click Purchase Document. The **Approve**, **Reject**, **Hold**, **Forward** tabs should appear.

22. Click the **Approve** tab

BusinessPlus Purchase Requests (POUPPR) ? Q SJ

Approvals

Purchase Doc... ▾

Pending
Sheila Jones
Group:
Since: 07/29/22 11:35:08
On: 12/31/50 00:00:00

Future
Group: Office Supplies, Forms

[Link to Task List](#)

✓ Approve

✗ Reject

👉 Hold

↶ Forward

Dates

Required Dt: Expiration Dt: Entry Dt: 07/29/2022 Expected Dt: Delivery Dt:

Blanket

Blanket No: Blanket Amt: 0.00 Rm: 0.00

Ship To ID: S0904
Purchasing Department

Ship To Addr Code: PR
Caddo Parish School Board
1961 Midway Avenue
SHREVEPORT, LA 71108

Phone Cd:

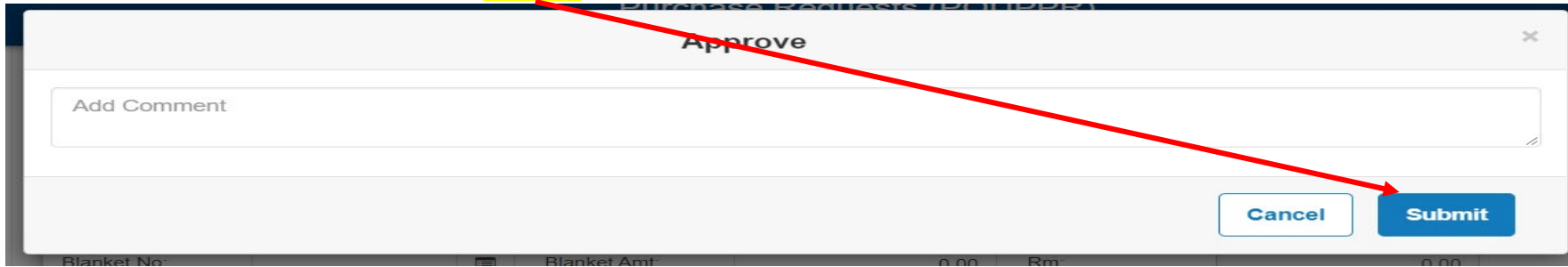
Bill To ID: S9999
Accounting Accounts Payable

Bill To Addr Code:

Phone Cd:

Other Information

23. An Approve box will pop-up - Click **Submit**.



The image shows a screenshot of a software interface. At the top, there is a dialog box titled "Approve" with a close button (X) in the top right corner. Below the title bar is a text input field with the placeholder text "Add Comment". At the bottom right of the dialog box, there are two buttons: "Cancel" and "Submit". A red arrow points from the word "Submit" in the text above to the "Submit" button in the dialog box. Below the dialog box, a table is partially visible with columns labeled "Blanket No", "Blanket Amt", and "Rm".

CONGRATULATIONS YOU HAVE CREATED AND SUBMITTED YOUR PR INTO BUSINESS PLUS WORKFLOW!