HOW TO ORDER MATERIALS AND SERVICES
Topics Covered

• How to create a Preq
• Tracking your order
• Finding previous order information
• Rejected Preq’s
• Vendor Workbench
• Preq Approval
Creating A Preq

There are two options to get to the Purchase Requisition Form:

1. Start directly on the Preq form
   - Mechanic’s Bench - Parts - Purchase Req
   - Supervisor’s Bench - Purchasing - Purchase Req
   - This method must be used for standing work orders
   - Work order number must be filled in on each line

2. Start on work order form
Click On PO Tab
Click Orders Button
Click Create Preq
Preq Form

A) **Mandatory field**
Put a description of what the Preq is for. This will transfer to the top line of the PO, but it will not print on either form. If applicable, first word should be “Emergency” (work started without PO) or “Rush” (PO needed immediately).

B) You can put the name of the person the order is for in this space.

C) Purchase type stays as **Inventory**.

D) Click Add Line.
1) Line Information Fields

- Fill in date needed by. Extra freight charges may be added to meet date.
- If you started Preq from work order form, the WO# will fill in automatically. If you started from Preq, you will need to add WO# after you have added part number.
- Advise checkbox does not work
2) Part Information Field

- Warehouse fills in automatically
- Part numbers to use are:
  - **MT** or **Material** for parts
  - **SV** or **Service** for a vendor coming in to do service
  - **Repair** for items being sent out for repair or service (not on-site)
  - **Capital** is used at MC
- Never use a stock part number
- Commodity field is left blank
- Urgent checkbox does not work
3) Suggested Vendor Fields

- Enter vendor code in Vendor No space
- If you do not know the code, click the Vendor No box which brings up Vendor List Form.
- Query: Enter part of vendor name with % sign before and after. This brings up list of all vendors that meet criteria. Select vendor you want - click OK.
- Vendor P/N - Enter vendor part # if there is one
- Leave Buyer field blank
4) Manufacturer Fields

- **DO NOT USE MFR, MFR Part Number, or MFR Brand boxes**
- Put all MFG information in the Vendor P/N box and Description field
- Substitution box does not work
5) Description Field

- Material: Full description of what the item is - manufacturer number, part number, specs, etc.
- If ordering a case: List it here
- Only one item per line
- If it is a stock item in the warehouse: List the stock part number, but include a complete description
- Service: List what is being done, where it is being done, when the work will take place, and a contact at the company.
- If applicable list “Emergency” or “Rush” as first word.
6) Quantity & Estimated Price Fields

- Uop is the unit of purchase and stays as **each**
- Quantity: Always use 1.00 for Service
- Unit Price: Put in the price if known, or an estimated price. If unknown, you may leave at $0 and we will get a quote
- Amount: Fills in automatically
- Click OK button when done
Preq Form Completing

A) If adding another line, click Add Line button

B) The status will be either Requested or Approved, depending on your dollar limit

C) If Preq is in Requested status, the next approver’s name is listed under your name
1) Start at work order form to find status of Preq, delivery dates, or pricing. Continue as if creating new Preq until you get to Orders form.

2) There are two views: One shows Active Orders, and the other shows All Orders. Top portion lists Preq’s, bottom portion list PO’s.

3) In the Active Orders Only view, a Preq will only show if it has not been turned into a PO. A PO will only show if it has not been closed out yet.

4) To view a Preq, click on that line and click the View button.
Tracking Your Order Continued

This takes you to Preq line form. Click PO button at bottom.

If Preq has been turned into a PO it is listed here. Click view button.
This takes you to PO Line form
A) Status of the order
B) Confirmed delivery date (use Cur Required)
C) Confirmed price
  • Click OK button and will go to PO page where you can see PO# and release# (if there is one)
  • If you click PO instead of Preq on work order, you will go directly to this page
Finding Previous Order Information

To research previous orders that you or someone else placed, open a blank Preq and enter query mode

1. Put name of person who placed Preq in Requested By box
2. Put partial description in field with % sign before and after
3. Once query is executed, use arrow keys to scroll through all Preq’s
Rejected Preqs

- If a Preq is rejected, it must either be corrected or cancelled:
  - To correct: Query the Preq# and click View Line. Make your changes to the description, price, etc. Preq will automatically go back to Materials Management or to Supervisor for approval.
  - To cancel: Change status on Preq form to Canceled
Vendor Workbench

- To research a vendor:
  Start on the Vendor Workbench form, located in the Parts folder
- Query the vendor name, using % sign to see list of vendors.
- To see more information on a vendor, click View Vendor button to go to the Vendor form
Vendor Form

- Vendor Sites tab shows address
- To see list of PO’s, click PO History button and then click Find button on form
- To see further information on a PO click the PO line and click View button to go to PO form
Preq Approval

Approval is done on Purchase Requisition Approval form found under Purchasing. You cannot approve from the My Documents tab.

1) Query the Preq#, if known
2) You may also query by Next Approver and scroll through all Preqs to approve
3) If Preq looks okay, click Approve box next to each line
4) Click Approve/Reject button
5) If you have questions on an order, click View Line button to go to Preq line form
Preq Approval - Work Order

• For questions on work order, note number from Preq form and query on work order form

• To view account number used, click Billing button on Work Order form to bring up Billing form
Preq Approval - Rejection

To Reject A Preq:

1) Click Reject box next to each line

2) You can put a comment in the Comments field with reason you are rejecting the Preq

3) Click Approve/Reject button