Requisition & Purchase Order (PO) Guide

What is the difference?

Term	Meaning
Requisition	Internal request asking permission to buy something
Purchase Order (PO)	Once a requisition has been approved, it becomes a Purchase Order (PO). After all required documentation has been attached and completed, the PO can be submitted for payment processing.

Think of it like this:

Need Item → Create Requisition → Approval → Purchase Order (PO) → Attach Documents → Mark as received → invoice → Payment Processing.

How to Create a Requisition in J1

Step 1: Log In

1. Log in to **Jenzabar**.
2. In the upper-left corner, click the **9-square menu icon**.

Step 2: Navigate to Requisitions

1. Select **Finance**.
2. Click **Procurement**.
3. Select **Create Requisition**.

Step 3: Complete the Requisition Header

In the top section of the requisition page, enter the following information:

- **Request Date** – Enter the date of the request.
- **Order Date** – Enter the date the items will be ordered.

- **Vendor** – Select or enter the vendor's name.
- **Address Code: *This is very important.* Each vendor will only have one vendor record available but may have multiple address codes. Be sure to select the correct address code associated with the vendor for your specific transaction. *When you click the drop down for address code you will always pick the REM-Remittance Address. If there are multiple REM addresses for a vendor, choose *your invoice* REM address from the drop down. *Failing to choose the correct REM address will cause the check to go to the wrong address.**
- **Requested By** – Enter the name of the person requesting the purchase.

Step 4: Enter Item Details

In the lower section of the page, complete the following fields for each item:

- **Item**
- **Quantity**
- **Cost per Unit**
- **GL Account Number**

Note: The GL Account Description should automatically populate after entering the GL account number.

Using Different GL Accounts on the Same Requisition

You can assign different GL account numbers to separate line items within the same requisition.

Example:
If you are purchasing 15 office chairs, and the cost of the chairs is charged to one GL account while the sales tax is charged to a different GL account:

- **Line 1**
  - **Item Description: Office Chairs**
  - **Quantity: 15**
  - **Cost per Unit: Cost of each chair**
  - **GL Account: Enter the GL account for the chairs**
- **Line 2**

- **Item Description: Taxes on Chairs**
- **Quantity: 1**
- **Cost per Unit: Total tax amount for the purchase**
- **GL Account: Enter the GL account that should be charged for the tax**

This allows you to accurately allocate different expenses to the appropriate GL accounts within a single requisition.

Step 5: Review of the Requisition

Carefully review all information entered to ensure:

- Dates are correct.
- Vendor information is accurate.
- Item details, quantities, and pricing are correct.
- The correct GL account has been selected.

Step 6: Submit the Requisition

Once you have confirmed all information is accurate:

1. Click **Create and Submit**.
2. The requisition will be submitted for processing.
3. Once you submit the requisition, a pop-up box will appear asking whether you want to create another requisition. If you do **not** want to create another one, uncheck the **"Create Another Requisition"** box. You will also uncheck the Generate a PDF option unless your vendor is requesting a copy of the Purchase Order Requisition.

Reminder

Always verify all information before submitting to avoid delays or corrections.

Checking the Status of Your Requisitions

If you want to check the status of your requisitions or view previously submitted requests:

1. Click the **9-square menu icon** in Jenzabar.

2. Select **Finance**.
3. Click **Procurement**.
4. Click **Summary**.
5. This page will display your orders and requisitions.
6. Select **Review Your Requisitions** to view all requisitions you have entered.
7. Use the available **filters** to search for specific requisitions, dates, statuses, vendors, or other information you need.

This feature allows you to track the progress and status of your requisitions and quickly locate previous entries.

Alternative Way to View Your Requisitions

You can also view and search for requisitions you have entered through the Procurement menu:

1. Click the **9-square menu icon** in the upper-left corner of Jenzabar.
2. Select **Finance**.
3. Click **Procurement**.
4. Select **Requisitions**.

This page displays all your requisitions. From here, you can search, review, and filter requisitions you have previously entered to quickly locate the information you need. You can also view the status of each requisition. Once a requisition has been approved, its status will indicate that it has been converted into a Purchase Order (PO).

Side Tip: If you are on a Procurement page and see the **"Procurement Hub"** title at the top of the screen, there is a drop-down menu directly below it “Hub options”. This menu provides shortcuts to different Procurement pages, allowing you to navigate more quickly without having to return to the main menu.

Purchase Orders (POs) and Supporting Documents

Once your requisition has been approved, it will automatically convert into a **Purchase Order (PO)**.

How to Locate Your Purchase Orders

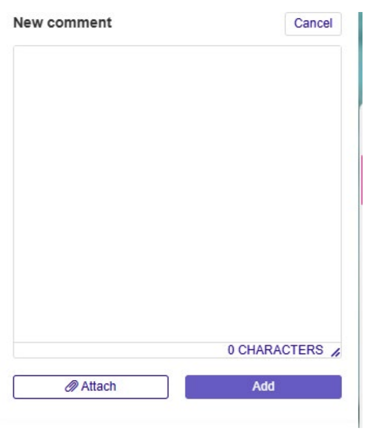
1. Click the **9-square menu icon** in the upper-left corner.
2. Select **Finance**.
3. Click **Procurement**.
4. Select **Purchase Orders**.

This page allows you to view and manage your Purchase Orders.

Adding Supporting Documents to a PO

Supporting documentation, such as invoices, quotes, receipts, and other required documents, should be attached to the Purchase Order.

1. Open the Purchase Order you want to update/add documentation to. *You do this by clicking on the number under the title "PO Number".
2. Click the **Notes** button in the top right corner then choose add comment then you can attach your documents.



3. Upload or attach the required supporting documents and invoices.
4. Verify that all necessary documentation has been attached for processing and payment.

Important Reminder

How to Mark a Purchase Order (PO) Ready for Payment

Before a Purchase Order (PO) can be submitted for payment, make sure all required supporting documentation has been attached to the PO.

Note: The action previously referred to as **"Mark Payable"** is now completed by selecting **"Mark All Received."**

Step 1: Open Procurement

1. From the Home Page, click the **9-square menu** in the top-left corner.
2. Select **Finance**.
3. Click **Procurement**
4. Click **Orders and Requests**.

Step 2: Find Your Purchase Order

1. In the Orders and Requests screen, you can view:
   - Unsubmitted POs
   - Returned POs
   - Pending Approval POs
   - Purchase Orders and Actions Needed
2. Select **Purchase Orders and Actions Needed**.
3. Open the PO that is ready to be submitted for payment. *You open the PO by clicking on the number under the “PO Description”.

Step 3: Mark the PO as Received

1. Verify that all required supporting documents have been attached.
2. Click **Mark All Received**.

Step 4: Submit for Payment Processing

Once all items have been marked as received, the PO will automatically be updated and become **ready to be processed for payment**.

Note: The action previously referred to as **"Mark Payable"** is now completed by selecting **"Mark All Received." This must be done for them to get paid.**

-Quick overlook-

Steps to Follow When a Payment Is Needed

- Enter a requisition.

- Upon approval, the requisition becomes a Purchase Order (PO).
- Upload the necessary documentation or invoice to the PO.
- Mark the PO as **Received** (formerly **Marked Payable**) so payment can be processed.

Approving Requisitions

If you are responsible for approving requisitions, follow the steps below:

Step 1: Log In

1. Log in to **J1**.
2. Click the **9-square menu** in the upper-left corner.
3. Navigate to:
    - **Finance**
    - **Procurement**
    - **Orders and Requests**

Step 2: Review of Pending Requisitions

1. Select the **Pending Approval** tab.
2. Review the requisitions that are awaiting your approval.

For each requisition, you can choose one of the following actions:

- **Approve** – Approves the requisition and allows it to move forward.
- **Deny** – Rejects the requisition.
- **Return** – Sends the requisition back to the requester for corrections or additional information.

After Approval

Once a requisition is approved, it is automatically converted into a **Purchase Order (PO)**.

The requester can then mark the Purchase Order as **Received** (formerly known as **Marked Payable**), making it ready for payment processing.