

Prepared By BPM Department

> Version# 2 – March 23, 2006 Updated : August 8, 2022.

Purchase Requisition System User's Guide

Access to the Purchase Requisition Application

- 1) The system is a web-based application and can be accessed via any web browser that has Coaster's Intranet service.
- 2) The web-site address of the system is: <u>http://web.coaster/PurchaseOrder/Login.aspx</u>.
- 3) The user can type the web-site address in the web browser's address box and click the "Go" button. For easy access in the future, the user can save the address in the "Favorites" folder.
- 4) If the user successfully accesses the system, the following login page will appear.

🚰 Login - Microsoft Internet Explorer		_ 8 ×
<u>File Edit Vi</u> ew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp		-
🚱 Back 🔹 🕥 - 💌 😰 🏠 🔎 Search 🤺 Favorites 📢 Media 🚱 🔗 🌭 🔜 🛄 🖄		
Address 🙆 http://web.coaster/PurchaseOrder/Login.aspx	💌 🄁 Go	Links »
CORSTER, Coaster Co. of America - Purchase Requisition		À
User Login (You have Logged Out The System, Please Log In)		
Password		
Login Reset		
		-
a Done	🕘 🛛 💓 Internet	

Log into the System

- 1) Before using the system, all users must log into the system.
- 2) The User ID and Password will be assigned and provided by the Finance department.
- 3) If the user has the valid user ID and password, he or she can type the ID number and password in the boxes of User ID and Password respectively and click the Login button.

🚰 Login - Microsoft Internet Explorer	_ 8 ×
<u>File E</u> dit <u>V</u> iew Favorites <u>T</u> ools <u>H</u> elp	n
😋 Back 🝷 🕥 🖌 📓 🏠 🔎 Search 🤺 Favorites 📢 Media 🤣 🔗 - 😓 🚍 🛄 🦓	
Address 🕘 http://cathy2/PurchaseOrder/Login.aspx	💌 🌛 Go 🛛 Links 🎽
User Login (You have Logged Out The System, Please Log In)	*
User ID 11111 Password Login Reset Type the user ID and password	
Click the Login button	

4) If the user successfully logs into the system, the name of the user will be displayed in the title bar as below.



Submit a New Purchase Requisition

1) Open a new purchase requisition form

- a) Point to the Purchase Requisition menu in the menu bar.
- b) Select and click New Purchase Request in the dropdown menu.



c) Then a new purchase requisition will be displayed as below.

🚳 New Purchase Requisiti	ion - Microsoft Internet Explorer	_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	ies <u>T</u> ools <u>H</u> elp	
🌀 Back 🝷 🕥 👻 💌	😰 🏠 🔎 Search 📌 Favorites 🜒 Media 🤣 😥 - چ 🚍 🛄 🖄	
Address 🙆 http://cathy2/P	urchaseOrder/NewPurchase.aspx	🔁 Go 🛛 Links 🂙
	Coaster Co. of America - Purchase Requisition	<u> </u>
Home	User Login Purchase Requisition Purchase Report Vendor	
Purchase Requisit	tion - NEW (Logged In As Gilbert Lo)	
Requester	Gilbert Lo - HQ Recipient Gilbert Lo	
Ship To*	12928 Sandoval Street Santa Fe Springs, CA 90670 Phone: (800)221-9699 Ext. 1198	
Notify (If Any)	Please Select Add	
Notify List		
Budget For	HQ MIS	
τ		

2) Fill out the information in the purchase requisition form

a) Requester, Recipient and Ship To address are automatically defaulted by the system based on the user's login. In most cases, the user is not required to change the default values. The field of Requester is not allowed to change; however, in case of necessary, the user can choose another recipient and change the information in the Ship To field.

🗿 New Purchase Requisition - Microsoft Internet Explorer	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	20
😋 Back 🔹 🕥 🖌 📓 🏠 🔎 Search 🤺 Favorites 🜒 Media 🤣 😥 😓 🔜 🦲 🦓	
Address 💩 http://cathy2/PurchaseOrder/NewPurchase.aspx	🔽 🄁 Go 🛛 Links 🌺
Coaster Co. of America - Purchase Requisition Home User Login Purchase Requisition Purchase Report Vendor Purchase Requisition - NPW: (Logged In As Gilbert Lo) Requester Gilbert Lo - HQ Recipient Gilbert Lo Ship To* 12928 Sandoval Street Santa Fe Springs, CA 90670 Phone: (800)221-9699 Ext. 1198	▲ Requester, Recipient and Ship To address are automatically defaulted by the system
Notify (If Any)Please Select Add Notify List	
Budget For HQ MIS	

b) If choosing another recipient, the Ship To address will be also changed to the selected recipient's branch address

🚰 New Purchase Requisit	ion - Microsoft Internet Explorer				
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	es <u>T</u> ools <u>H</u> elp				🥂 🕹 🖓
🚱 Back 👻 💮 🖌 💌	💈 🏠 🔎 Search https://www.search	🔇 Media 🧭	🗟 • 😓 🔜 🦀 👘		
Address 🙆 http://cathy2/P	urchaseOrder/NewPurchase.aspx				🔽 ラ Go 🛛 Links 🎽
	Russen Co. of Am	erica - Purch	ase Requisition	\int	If choosing another recipient, the Ship To address will be
Home	osei Login - Futenase requisition	Turenase Report	· ciudoi	\square	also changed to the selected
Purchase Requisit	ion - NEW (Logged In As Gilbe	ert Lo)			recipient's branch address
Requester	Gilbert Lo - HQ	Recipient	Frank Yip	•	recipient s branch address
Ship To*	20300 E. Business Parkway City of Industry, CA 90670 Phone: (909)468-5094 Ext.	1163	Alex Rojas Boris Cabrera Curtis Rio Daniel Chang	<u> </u>	
Notify (If Any)	Please Select 💌	Add	Daniel Chew		
Notify List			Gilbert Lo		
Budget For	HQ MIS		James Ha		
Vendor*	***Not Selected***		Jennifer Rodriguez	Ţ	

c) The user can add different notify parties in the Notify List if needed or leave it blank.

🍯 New Purchase Requis	tion - Microsoft Internet Explorer			_ 8
<u>File E</u> dit <u>V</u> iew F <u>a</u> vo	ites <u>T</u> ools <u>H</u> elp			4
🕞 Back 🝷 💮 👻 🗙] 💈 🏠 🔎 Search 👷 Favorites 🌒 Media	• 🚱 🍃 🥃 🕞 🦓		
Address 🙆 http://cathy2,	PurchaseOrder/NewPurchase.aspx			💌 🄁 Go 🛛 Links
COAST FINE PLS	User Login Purchase Requisition Purchase	Purchase Requisition		
Purchase Requis Requester	ition - NEW (Logged In As Gilbert Lo) Gilbert Lo - HQ Reci	Select and add a no	otify party if	
Smp 10"	20300 E. Business Parkway City of Industry, CA 90670 Phone: (909)468-5094 Ext. 163			
Notify (If Any)	Please Select 🔽 Add			
Notify List	Please Select			
Budget For	Boris Cabrera			
Vendor* Vendor Details	Curtis Rio Daniel Chang			

d) The Budget For field is automatically defaulted to the requester's branch and department but in case of necessary, the user can change the settings.

🚰 New Purchase Requisi	tion - Microsoft Internet Explorer		_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vori	ites <u>T</u> ools <u>H</u> elp		
🕞 Back 👻 🕥 👻 🔀] 🖻 🏠 🔎 Search 🤺 Favorites 🜒 Media 🤣 😥 - چ 🔜 🛄 🖄		
Address 🙆 http://cathy2/l	PurchaseOrder/NewPurchase.aspx	💌 🔁 Go	Links »
COAST FINE FUR Home	User Login Purchase Requisition Purchase Report Vendor		-
Purchase Requisi	ition - NEW (Logged In As Gilbert Lo)		
Requester	Gilbert Lo - HQ Recipient Frank Yip		
Ship To*	20300 E. Business Parkway City of Industry, CA 90670 Phone: (909)468-5094 Ext. 1163 Change the settings as needed or leave them as default		
Notify (If Any)	Please Select Add		
Notify List			
Budget For			

e) The next step is to select a vendor. The user can select the vendor from the dropdown box and then the vendor's address and contact information will be automatically displayed in the Vendor Details box.

🎒 New Purchase Requisit	ion - Microsoft Internet Explorer					
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	tes <u>T</u> ools <u>H</u> elp					
🌏 Back 🔹 🕥 🖌 💌	👔 🚮 🔎 Search 🤺 Favorites 🌘	🔊 Media	🥝 🔗 🍃 📃	3 🔜 🚜		
Address 🙆 http://cathy2/P)urchaseOrder/NewPurchase.aspx					🔽 🔁 Go 🛛 Links
Notify (If Any)	Please Select	٨dd			_	
Notify List						Select the vendor from
Budget For	HQ MIS					
Vendor*	POWERFLOW SYSTEMS INC.			-		the dropdown box
Vendor Details	HiTech Software Johnny Parts M&M Parts Comapny New Century Technology					
Required Date*	New Hyperlink					
Items and Charge	POWERFLOW SYSTEMS INC.					
Quantity	Testing New Hyperlink The Nerds					
Description	The Nerds Computing Company XYZ Computing			-		
Qty Unit	Description		UnitPrice	Total		
			Sub Total	\$0.00		
			Tax Rate	0.0825		

🏄 New Purchase Requis	ition - Microsoft Internet Explorer	_ @ ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vo	rites Iools <u>H</u> elp	
🚱 Back 🝷 🕥 👻 🗶] 🛃 🏠 🔎 Search 🤺 Favorites 🜒 Media 🧭 🔗 😓 🔜 🧾 🦓	
Address 🕘 http://cathy2/	/PurchaseOrder/NewPurchase.aspx	💌 🄁 Go 🛛 Links 🎽
Notify (If Any)	Please Select Add	
Notify List		Vendor address and
Budget For	HQ MIS	contact information are
Vendor*	POWERFLOW SYSTEMS INC.	now displayed in the
Vendor Details	10715 SPRINGDALE ROAD #2 SANTA FE SPRINGS, CA 90670	Vendor Details box
	Phone No: 800.987.6526 / CELL # 562.244.0804	
Required Date*	Terms Shipped Via	
Items and Charg	es	
Quantity	Unit Unit Price	
Description	Cancel Add	

f) In case the vendor is not available in the vendor list, the user can select ***Not Available***. Then go to the "Quote From Vendor" section and input the new vendor details. Later on, the administrator will create a new vendor and apply it to the PR.

🚈 New Purchase Requisi	tion - Microsoft Internet Explorer		×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vori	ites <u>T</u> ools <u>H</u> elp		1
🚱 Back 🝷 🕥 👻 💌] 💈 🏠 🔎 Search 🤺 Favorites 📢 Media 🚱 🔗 🍃 📴 🛄 🔏 👘		
Address 🙆 http://cathy2/F	PurchaseOrder/NewPurchase.aspx	💌 🄁 Go 🛛 Links	; »
Purchase Requisi	ition - NEW (Logged In As Gilbert Lo)		
Requester	Gilbert Lo - HQ Recipient Frank Yip	V	
Ship To *	20300 E. Business Parkway City of Industry, CA 90670 Phone: (909)468-5094 Ext. 1163	Select ***Not Available ***	1
Notify (If Any)	Please Select Add	if the wonder is not in the	
Notify List		If the vendor is not in the	
Budget For	HQ MIS	vendor list	
Vendor*	***Not Available***		1
Vendor Details		×	

🚰 New Purchase Requisition - Microsoft Internet Explorer	_ 8 ×
<u>File E</u> dit <u>Vi</u> ew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp	27
😋 Back 🔻 🕥 🖌 😰 🏠 🔎 Search travorites 🜒 Media 🤣 🍃 🎍 🧾 🦓	
Address 🗃 http://cathy2/PurchaseOrder/NewPurchase.aspx	💌 🄁 Go 🛛 Links 🎽
Reset Submit	<u> </u>
Quote From Vendor (1)	
Vendor	Go to the "Quote From
Phone No Fax No	Vendor" section and
EMail	input the new vendor
Web Site	details
Address	uctails
City Zip	
Description	
Total	
Quote From Vendor (2)	

- g) The Required Date is a required field and must be inputted with a valid date. In addition, the system will not accept the date earlier than the request date.
- h) The Terms and Shipped Via are optional. If the user does not input the information, the administrator will input it for the user later.

🛎 New I	Purchase Requisit	ion - Microsoft Interne	t Explorer					_ 8 ×
<u>Eile E</u>	dit <u>V</u> iew F <u>a</u> voril	es <u>T</u> ools <u>H</u> elp						
G Bac	:k 🕶 💮 👻 🔀	👔 🏠 🔎 Seard	ch 🤺 Favorites	ia 🚱 🍰 🌺 🔜 🛄 🖓				
A <u>d</u> dress	🕘 http://cathy2/P	urchaseOrder/NewPurchas	se.aspx			-	🔁 Go	Links »
		Phone: (909)468	3-5094 Ext. 1163					_
N∘	tify (If Any)	Please Select	✓ Add	Input the required date				
No	tify List			accordinally				
Bue	dget For	HQ MIS					7	
Ver	ndor*	***Not Available***		/	Both	are the		
Ver	ndor Details				optio	onal fields		
_								
Rea	quired Date*	2/10/2006	Terms	Shipped Via]			
Ite	ms and Charge	S						
Qu	antity		Unit	Unit Price				
D				A				
De	scripuon			🗾 Cancel Ad	bt			

i) Item details can be inputted in the Items and Charges section. All the fields of Quantity, Unit, Unit Price and Description are the required fields; therefore, the user must input all the information in these fields. After the user inputs the item details, click the Add button.
 a. Negative amount can be entered on Qty and Unit Price

🚰 New Purchase Requisit	on - Microsoft Internet Explorer	B
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	es <u>T</u> ools <u>H</u> elp	🥂 🕺 🕺 🕺 🖉
🕞 Back 🝷 💮 👻 💌	😰 🏠 🔎 Search 🤺 Favorites 😻 Media 🧭 🔗 -	😓 🖻 📙 🖓
Address 🕘 http://cathy2/P	urchaseOrder/NewPurchase.aspx	🔽 🄁 Go 🛛 Links 🎽
	Phone No: 800.987.6526 / CELL # 562.244.0804	Input the item details
Required Date*	2/10/2006 Terms Shipped V	Via accordingly
Items and Charge		
Quantity	2 Unit Each Unit Pri	'rice 2586
Description	New Powerflow Industrial Battery Model # 18-125-13-1	Caneer Add
Qty Unit	Description UnitPrice	Total
	Sub Total	SO.00 Click the Add button
	Tax Rate	0.0825
	Sales / Use T	Tax
	Shipping	
	Misc Charge	je
	Total	

j) After the Add button is clicked, the line item will be displayed as below. If the user needs to edit or delete the item, he or she can click the Edit or Delete button accordingly. If the user needs to add more items, he or she can do the same procedure as mentioned above.

	Cat.	Qty	Unit	Description	Uni	tPrice	1	otal		
	N/A	3	ea	test1		50.00		\$150.00	Edit	Delete
	N/A	1	ea	test		-25.00		(\$25.00)	Edit	Delete
	N/A	-1	ea	test4		25.00		(\$25.00)	Edit	Delete
a.						Sub	T	otal 100.0)0	

New Purchase Requisition	n - Microsoft Internet Explorer				_ 8 ×	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	Ejle Edit View Favorites Iools Help					
😋 Back 🝷 💮 👻 📘	💈 🏠 🔎 Search href Stavorites 🧕	👌 Media 🛛 🧭 📄 🛃	- 🔜 🦓 - 🕹 - 🕹 - 🕹 - 🕹			
Address 🙆 http://cathy2/Purc	:haseOrder/NewPurchase.aspx			💌 ラ Go	Links »	
I	Phone No: 800.987.6526 / CELL	<i>#</i> 562.244.0804	~		_	
Required Date* 2	2/10/2006 Terms	Shipped Via				
Items and Charges						
Quantity	Unit	Unit Price				
Description						
			Cancel Add			
Qty Unit Descript	tion	UnitPrice Total				
2 Each New Pov Model #	werflow Industrial Battery 18-125-13-1	\$2,586.00 \$5,172.00	Edit Delete		٦ I	
	↑	Sub Total	\$5,172.00	Click the Edit or		
		Tax Rate	0.0825	Delete button if		
Т	he line item is now	Sales / Use Tax	\$426.69	the user wants to		
	an love d h and	Shipping	0	edit or delete the		
	isplayed here	Misc Charge	0	item		
		Total	\$5,598.69			

k) The Tax Rate is defaulted by the system and is based on the default Ship To address's city; however, the user can change it if necessary. If there are any shipping and miscellaneous charges, the user can input them in the Shipping and Misc. Charge fields accordingly. When the Total button is clicked, the system will recalculate the total charge.

<u> Eile E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools <u>H</u> elp			🥂 🕺 🖉
🚱 Back 🔹 🕥 👻 😰 🏠 🔎 Search Favorites	; 🜒 Media 🧭 🔗 🛁 🔜	- 🍊	
Address 🗃 http://cathy2/PurchaseOrder/NewPurchase.aspx			💌 ラ Go 🛛 Links 🌺
			<u> </u>
Qty Unit Description	UnitPrice Total	Cancel Add	Change the tax rate
2 Each New Powerflow Industrial Battery Model# 18-125-13-1	\$2,586.00 \$5,172.00	Edit Delete	if necessary
	Sub Total Tax Rate Sales / Use Tax	\$5,172.00 0.0825 \$426.69	Input the shipping and misc, charges, if any
Click the Total button to re- calculate the total charge	Shipping Misc Charge Total	10 4 0 5 ,608.69	

 After the user inputs the line item, the next step is to add the approval manager(s). The approval manager(s) can be selected from the VP/Manager dropdown box in the Approval section. After the approval manager is selected, click the Add button to add the name to the list.

🚈 New Purchase Requisitio	on - Microsoft Internet Explorer					_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	s <u>T</u> ools <u>H</u> elp					1
🚱 Back 👻 💮 👻 🔀	😰 🏠 🔎 Search https://www.com	es 🔇 Media 🧭 🄀 🕇	· 😓 🔜 🦲 🦓			
Address 🕘 http://cathy2/Pu	rchaseOrder/NewPurchase.aspx				💌 🄁 Go	Links »
Approval and Purc	hase Purpose					_
VP / Manager	John Lee	Add Approval Aut	thority Table			
Approved By*	Boris Cabrera		Select the non	ne and click		
Replacement?	Frank Yip					
Purchase Purpose *	James Ha John Flanagan		the Add butto	n		
	Judy Tuan			_		
Item(s) Budgeted?	Maggie Kow	Internal Transfer?	OYes ⊙No			
Instruction / Ref (Internal Use)	Nina Lopez Vivian Zhang	,	×			

m) The manager's name is now displayed in the list. If the user needs to add more approval manager(s) to the list, he or she can do the same procedure as above. If the user needs to delete the name of the manager from the list, click the Delete button.

🏄 New Purchase Requisiti	ion - Microsoft Ir	ternet Explorer					_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	es <u>T</u> ools <u>H</u> elp						-
🕞 Back 🝷 💮 👻 💌	2 🏠 🔎) Search 🛛 👷 Favorites 🛛 😢 Med	ia 🧭 🔗	- 🍓 [🚽 📙 🚳		
Address 🙆 http://cathy2/P	urchaseOrder/NewF	urchase.aspx				💌 🄁 Go	Links »
Approval and Pure	hase Purpose:			r			
VP / Manager	John Lee	▼ Add	Approval Au	thority	Click the delete button if the		
Approved By*	John Lee	Delete			user needs to delete the		
Replacement?	O Yes	© No			approval manager from the list		
Purchase Purpose *		The name is now			×		
Item(s) Budgeted?	O Yes	displayed in the li	ist here	Yes	• No		
Instruction / Ref (Internal Use)					×		

n) Indicate whether the requested item is to replace the old one or not.

🚰 New Purchase Requisiti	ion - Microsoft Internet Explorer	_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	es <u>T</u> ools <u>H</u> elp	
🕞 Back 🝷 🕥 👻 💌	😰 🏠 🔎 Search 🤺 Favorites 📢 Media 🧭 🔗 - 😓 🚍 🛄 🦓	
Address 🙆 http://cathy2/Pu	urchaseOrder/NewPurchase.aspx 🔽 🄁 Go	Links »
Approval and Purc	chase Purpose	_
VP / Manager	John Lee Add Approval Authority Table	
Approved By*	John Lee Delete Indicate whether the requested item	
Replacement?	© Yes ○ No	
Purchase Purpose *	Is to replace the old one of not	
-		
Item(s) Budgeted?	$\begin{tabular}{ c c c c c } \hline $ O $ Yes $ \hline $ O $ No $ \end{tabular} $ $ \end{tabular} Internal Transfer? $ \begin{tabular}{ c c c c c c } \hline $ O $ Yes $ \hline $ O $ No $ \end{tabular} $ \end{tabular} $ $ ta$	

o) The Purchase Purpose is a required field and must be inputted as below. If the requested item is a replacement, the user may be required to input the old item's information such as serial number and/or the purchased date.

a. How would you like to handle this PR after approval?

	How would you like	COD order. Please issue the check
to has	approval? *	Email PR to vendor
	11	Do nothing. Order already placed.
	Please place order via web	
		Please call to place an order
b.		

p) If the Item(s) to be purchased are budgeted, select "Yes" in the Item(s) Budgeted field; otherwise select "No". The default value is "No".

🏄 New Purchase Requisiti	on - Microsoft Internet Explorer		_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	es <u>I</u> ools <u>H</u> elp		
🕞 Back 🝷 🌍 👻 💌	😰 🏠 🔎 Search 🤺 Favorites 🔇 Media 🧭 🔗 🍃 🤤 🛄 🖄		
Address 🗿 http://cathy2/Pu	rchaseOrder/NewPurchase.aspx	💌 🔁 Go	Links »
Approval and Purc	hase Purpose		
VP / Manager	John Lee Add Approval Authority Table		
Approved By*	John Lee Delete		
Replacement?	C Yes © No		
Purchase Purpose *	To replace the old batteries. Serial# 1234 Select "Yes" or "No" to indicate		
Item(s) Budgeted?	C_{Yes} c_{No} Internal Transfer? (whether the item(s) to be purchased are budgeted or not. The default		
Instruction / Ref (Internal Use)	value is "No"		

q) The Internal Transfer field is to let the user indicate whether the purchased item(s) are required to be transferred from one branch to another after received from the vendor. Most likely the internal transfer will occur when the item(s) are required to be configured in the IT department before forwarding to the requester / end-user.

🏄 New Purchase Requisiti	on - Microsoft Internet Explorer	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	es Iools Help	🥂 🕺
Ġ Back 🝷 🜍 👻 💌	😰 🏠 🔎 Search 🤺 Favorites 🜒 Media 🥝 🍃 🎍 🔜 🦓	
Address 🕘 http://cathy2/Pu	rchaseOrder/NewPurchase.aspx	Go Links »
Approval and Purc	hase Purpose	Indicate whether the internal
VP / Manager	John Lee Add Approval Authority Table	transfer is required or not.
Approved By*	John Lee Delete	The default value is "No"
Replacement?	C Yes © No	
Purchase Purpose *	To replace the old batteries. Serial# 1234 & 1235 - purchased on 2/2/03	
Item(s) Budgeted?	C Yes © No Internal Transfer? C Yes © No	
Instruction / Ref (Internal Use)		×

r) If the Internal Transfer is checked to "Yes", the Instruction/Ref (Internal Use) field will become a required field and the user should input the internal transfer instruction. However, this field can be also used for the internal communication / reference purpose.

🏄 New Purchase Requisiti	on - Microsoft Internet Explorer	
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	s <u>T</u> ools <u>H</u> elp	an a
🕒 Back 🝷 📀 👻 💌	😰 🚮 🔎 Search 🤺 Favorites 🜒 Media 🚱 😥 🎍 🔜 🦲 🚳	
Address 🙆 http://cathy2/Pu	rchaseOrder/NewPurchase.aspx	💌 🄁 Go 🛛 Links 🎽
Approval and Purc	nase Purpose	
VP / Manager	John Lee Add Approval Authority Table	
Approved By*	John Lee Delete	Input the internal transfer
Replacement?	○ Yes	instruction if needed or any
Purchase Purpose *	To replace the old batteries. Serial# 1234 & 1235 - purchased o 2/2/03	reference
Item(s) Budgeted?	CYes © No Internal Transfer? CYes © No	
Instruction / Ref (Internal Use)	Please purchase it asap	X

s) The Remark field is optional and any message typed in the field will be displayed in the PO that sent to the vendor. The user can put the reference information for the vendor in the field.

🚰 New Purchase Requisitio	ion - Microsoft Internet Explorer	8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	es <u>I</u> ools <u>H</u> elp	2
🌀 Back 🝷 🌍 👻 💌	😰 🏠 🔎 Search 🧙 Favorites 🜒 Media 🧭 🎅 - 😓 🚍 🛄 🦓	
Address 🕘 http://cathy2/Pu	urchaseOrder/NewPurchase.aspx 🔽 🄁 Go 🛛 Lii	nks »
Approval and Purc	chase Purpose	
VP / Manager	John Lee Add Approval Authority Table	
Approved By*	John Lee Delete	
Replacement?	C Yes C No	
Purchase Purpose *	To replace the old batteries. Serial# 1234 & 1235 - purchased on	
T. () D. 1 . 10	Input the reference information	
Item(s) Budgeted (<u>Ores</u> Ores Ores for the vendor here, if any	
Instruction / Ref (Internal Use)	Please purchase it asap	
Remark	Coupon# 13579	
	Reset Submit	

t) Toward the bottom of the Purchase Order, you can now upload 5 different file(s) in different format as shown. You can attached receipt, invoices, etc.

Uploading Files	
Upload File: d:\Documents and Settings\LA235\Desktop\2158594_GT-I5500pdf pdf, doc, xls, jpg, jpeg, gif are accepted.	Browse
Upload File: pdf, doc, xls, jpg, jpeg, gif are accepted.	Browse
<u>upload more file</u>	

3) Submit the purchase requisition form

a) After the user has inputted all the relative information, click the Submit button to submit the requisition form. After that, a message box will show up and confirm the submission with a PR number. The requester, approval manager(s) and notify party (if any) will also receive the confirmation and notification via email later.

🏄 New Purchase Requisitio	on - Microsoft Internet Explorer								
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorite	File Edit View Favorites Tools Help								
Ġ Back 🔹 📀 👻 💌	🌀 Back 🔹 🚱 🔹 😰 🐔 🔎 Search 🤺 Favorites 🜒 Media 🥝 🔗 - 😓 🚍 🛄 🖄								
Address 🕘 http://cathy2/Pu	rchaseOrder/NewPurchase.aspx	💌 芛 Go 🛛 Links 🌺							
replacement?	0 1 es 0 140								
Purchase Purpose *	To replace the old batteries. Serial# 1234 & 1235 - purchased on Click the Subr 2/2/03								
Item(s) Budgeted?	C Yes ⊙ No Internal Transfer? C Yes ⊙ No	the form							
Instruction / Ref (Internal Use)	Please purchase it asap								
Remark	Coupon# 13579								
	Reset Submit								



b) After the PR submitted, any update make to the PR – an email will send to the users in notify list and managers and administrator.

Approve a purchase requisition

- 1) After the requester submits the requisition, the related approval manager(s) will receive a notification for approval via email.
- 2) In order to approve the requisition, all the approval managers must use their own login to log into the system.
- 3) The approval manager can check the pending approval requisitions by a report. To show the approval report, point to the Purchase Report menu in the menu bar and then select and click My Approvals in the dropdown menu.

🚰 Home Page - Microsoft Internet Explorer	
<u>File Edit View Favorites Iools H</u> elp	🥂 🕺
🚱 Back 🔹 🕥 - 📓 🙆 🏠 🔎 Search 🡷 Favorites 🜒 Media 🧭 🍰 🍃 🌄 🛄 🦓	
Address 🗃 http://cathy2/PurchaseOrder/default.aspx	🔽 🛃 Go 🛛 Links 🎽
COASTER, Coaster Co. of America - Purchase Requisition	
Home User Login Purchase Requisition Purchase Report Vendor	Select and click the
Home Page (Logged In As John Lee) John, Welcome to the Purchase Requisition Sy My Shipments My Approvals My Notified PR	My Approvals menu from the dropdown menu

4) Then the report will be displayed as below.

My Approvals - Microsoft Internet Explorer									
Elle Edit View Favorites Iools Help									
🌏 Back 🔹 🕑 🖌 🗾 😰 🏠 🔎 Search 🤺 Favorites 🜒 Media 🤣 🍰 😓 🔜 🛄 🦓									
iress 🥘 htt	p://cathy2/Purcha	seOrder/MyApproval.as	рх				Go L		
COf	ASTER	. Coaster Co	o. of America	- Purchase	Requisition				
Ho	me	User Login Purch	ase Requisition Purcha	ise Report Ve	ndor				
My Appi	ovals (Log	ged In As John L	ee)						
Sort By	Requ	ested Date 🖃	Go						
Requeste	d From		To 2/6/2	006					
Search By	y All	•	Search Input		Search				
• Pendi	ng for Approv	al C Approv	red						
	<u> </u>			12					
PR No.	Status	Approved On	Requested On	Required On	Vendor	Total Amount			
10071	Requested		2/3/2006	2/10/2006	POWERFLOW SYSTEMS INC.	\$5,608.69			
10068	Requested		2/2/2006	2/15/2006	ABC Company	\$120.16			
10066	Requested		2/2/2006	2/14/2006	Compumax Computer Inc.	\$117.17			

5) All the requisitions in the report are pending for approval and the approval manager can select one of them at a time by clicking the PR No. hyperlink.

🎒 My Approva	ls - Microsoft Internet	Explorer						
Eile Edit Vie	Elle Edit View Favorites Iools Help							
🕒 Back 👻 🌔) - 💌 😰 🏠	🔎 Search 🛛 👷 Favorit	es 왕 Media 🧭 욷	3• 崣 🔜 🧾 🦓				
Address 🙆 htt	p://cathy2/PurchaseOrder	/MyApproval.aspx			~	🄁 Go 🛛 Links 🎙		
CO	ASTER , Co	baster Co. of Ar	nerica - Purcha	se Requisition		_		
Но	me User Log	gin Purchase Requisition	Purchase Report	Vendor				
My Appi	rovals (Logged L	n As John Lee)						
Sort By	Requested	Date 💌 Go						
Requeste	d From	T∘	2/6/2006					
Search B	7 All	💽 🛛 Search Inp						
© Pendi	ng for Approval	C Approved	Click the Pl	R No. hyperlink to				
			show the re	quisition				
PR No.	Status App	proved On Reques	ted On Required (On Vendor	Total Amount			
10071	Requested	2/3/2006	2/10/2006	POWERFLOW SYSTEM	IS INC. \$5,608.69			
10068	Requested	2/2/2006	2/15/2006	ABC Company	\$120.16			
<u>10066</u>	Requested	2/2/2006	2/14/2006	Compumax Computer Inc	\$117.17			

6) Once the hyperlink is clicked, the purchase requisition will be displayed as below and there is a label showing whether the PR has been approved or not.

🎒 Edit P	urchase F	Requisitio	on - Microsoft	Internet Explo	orer								_ 8 ×
File Ed	File Edit View Favorites Tools Help 🧗									1			
🕝 Bad	k • 📀	- 💌	🖻 🏠 .	🔎 Search 🚽	Favorites	🔮 Media 🚱	🔊 - 🍓 🗖	3 🔜 🎕	8				
Address	🕘 http://	/cathy2/Pu	urchaseOrder/Ec	ditPurchase.asp×	?poNo=10071						-	🔁 Go	Links »
C	OA;		R , Coa	ster Co.	of Am	erica - Purc	hase Req	uisitior	1				<u> </u>
	Home		User Login	Purchase	Requisition	Purchase Report	Vendor						
Pur Cor	r <mark>chase R</mark> nfirmed R	equisit leceipt (ION EDIT	(Loged Is ROVED	n As John	Lee)			The la	bel will show			
PR PR	N₀ Date		10071	Go 05:58 PM	Reset	PO Status PO Date	Requested	Hold	Lancel	Fig. an eranded			
ET/ Rec	A / Arriva quester	al	Gilbert Lo -	HQ		Received On Recipient	Gilbert Lo		_				

7) The approval manager can scroll down the screen and check the details. If everything is correct, the approval manager can click the Approve button in the Approval section to approve the PR.

🏄 Edit Purchase Requisiti	on - Microsoft Inte	ernet Explorer							_ 8 ×
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorit	es <u>T</u> ools <u>H</u> elp								1
🕞 Back 🝷 💮 👻 💌	💈 🏠 🔎	Search 📌 Favorites	😢 Media	🙆 🔗	4	2 🔜 🚜 👘			
Address 🕘 http://cathy2/PurchaseOrder/EditPurchase.aspx?poNo=10071									Links »
Difference					,	L			-
\$0.00				Total		\$5,608.69			
Approval and Pure	chase Purpose							Click the Approve	
VP / Manager	Please Select	- •	Add	Approve	Appro	val Authority Tabl	e	button to approve	
Approved By	Name	Approval Date							
	John Lee		[Delete				the PK	
Purchase Purpose	Replace the	old batteries					A V		
T. (m c	[

8) Once the Approve button is clicked, the confirmation box will be displayed.

🖉 Edit Purchase I	Requisition - Microsoft Internet Explorer	_ 8 ×
File Edit View	Favorites Tools Help	
G Back 🝷 🕥) - 💌 😰 🏠 🔎 Search 🥋 Favorites 🜒 Media 🤕 🎰 😓 🍃 🧫 🛄 🦓	
Address 🙆 http:/	/cathy2/PurchaseOrder/EditPurchase.aspx?poNo=10071 🗾 🔁 G) Links »
COA	STER , Coaster Co. of America - Purchase Requisition The confirmation box will] 1
Home	User Login Purchase Requisition Purchase Report Vendor confirm the approval with	
Purchase F	Requisition - EDIT (Logged In As John Lee) a date and time	
PR No PR Date	Microsoft Internet Explorer	-
ETA / Arriv Requester		
Ship To		

- 9) If the approval manager needs to check back the details of the approved PR(s), he or she can use the My Approvals report again.
- 10) Once the report shows up, click the Approved radio button and all approved PR(s) will be displayed. If the approval manager needs to see the approved PR, click the PR No. hyperlink.

🗿 My Approvals - Microsoft Internet Explorer								
Eile Edit View Favorites Iools Help								
🚱 Back 🔹 🕥 🖌 😰 🚮 🔎 Search Favorites 🜒 Media 🥝 😥 😓 🔜 🤐 🚳								
Address 🗃 http://cathy2/PurchaseOrder/MyApproval.aspx	🔽 🔁 Go 🛛 Links 🌺							
CORSTER Coaster Co. of America - Purchase Requisition All Home User Login Purchase Requisition Vendor are	approved PR(s) now displayed in							
My Approvals (Logged In As John Lee) Sort By Approval Date Go Requested From 8/9/2005 Search By All Search Input	report							
C Pending for Approval © Approved								
1 <u>2</u>	•							
PR No. Status Approve <mark>d On Description Description W</mark> endor	Total Amount							
100 Approved 2/7/2006 Click the hyperlink to show DWERFLOW SYSTEMS	SINC. \$5,608.69							
10069 Approved 272/2006 the approved PR	\$2,163.92							
10060 Closed 1/27/200 re Nerds Computing Com	pany \$1,039.28							
10059 POSent 1/25/2006 1/25/2006 1/30/2006 ABC Company	\$513.11							

11) The approved PR is now displayed and the status has been changed to "APPROVED".

🎒 Edit Purchase Requisit	🔋 Edit Purchase Requisition - Microsoft Internet Explorer							
<u>File E</u> dit <u>V</u> iew F <u>a</u> vori	Eile Edit View Favorites Tools Help							
🕞 Back 👻 🕤 👻 💌	📓 🏠 🔎	Search 🤺 Favorites	😢 Media 🧭	🔊 · 🎍 🔜	3			
Address 🙆 http://cathy2/F	PurchaseOrder/EditP	urchase.aspx?poNo=10071					💌 🔁 Go	Links »
	ER , Coast	er Co. of Ame	erica - Purcl	hase Requi	sition			<u> </u>
Home	User Login	Purchase Requisition	Purchase Report	Vendor	The status	has been changed		
Purchase Requisi	tion - EDIT	(Logger in As John	Lee		to "APPR	OVED"		
Confirmed Receipt	<u>Show PO</u>	APPROV	ED					
PR N∘	10071	Go Reset	PO Status	Approved	Hold Cancel			
PR Date	2/3/2006 5:05:5	58 PM	PO Date					
ETA / Arrival			Received On					

Search a Purchase Requisition

1) All users can search their PR submission and check the status in a report. Point to the Purchase Report in the menu bar and select My Requests from the dropdown menu.

🚰 Home Page - Microsoft Internet Explorer		_ 8 ×					
Eile Edit View Favorites Iools Help							
🔇 Back 🔹 🕥 🖌 📓 🐔 🔎 Search 👷 Favorites 🜒 Media 🏾 🊱 🖉 + 🍃 🔜 🛄 🦓							
Address 🗃 http://cathy2/PurchaseOrder/default.aspx	🗾 🔁 Go	Links »					
Home User Login Purchase Requisition Vendor	Select My Requests	-					
Home Page (Logged In As John Lee) My Requests							
John, Welcome to the Purchase Requisition Sy My Shipments							
My Approvals My Notified PR							

2) The report is now displayed and shows the status of each PR. Click the PR No. hyperlink to show the related PR.

🎒 My Requested Orders - M	icrosoft Internet Explorer								
<u>File Edit View Favorites</u>	<u>T</u> ools <u>H</u> elp	🥂 🖉							
승 Back 👻 💮 👻 📘	🔆 Back 🔹 🕥 🖌 😰 🏠 🔎 Search 🤺 Favorites 💜 Media 🚱 😥 🥪 🔜 🛄 🖄								
Address 🙆 http://cathy2/Purc	uddress 👸 http://cathy2/PurchaseOrder/MyOrder.aspx 💽 🎅 Go 🛛 Links								
	Coaster Co. of A	America - F	Purchase Requisition	<u>•</u>					
Home	User Login Purchase Requisi	ion Purchase	The report shows the						
	<i>a</i> 17.4 am		status of each PR						
My Requested Ord	ers (Logged In As Gilbert		status of each r is						
Sort By R	quested Date								
Requested From 88 Search By A	V2005	6 2/7/2006 a Input	6 Search	Click the PR No. hyperlink to show the PR					
			123						
PR No. Status	Requested On	Required On	Vendor	Total Amount					
10071 Approv	a 2/3/2006	2/10/2006	POWERFLOW SYSTEMS INC	\$5,608.69					
10070 Request	ed 2/2/2006	2/14/2006	ABC Company	\$2,163.92					
<u>10069</u> Approv	ed 2/2/2006	2/14/2006	ABC Company	\$2,163.92					

Confirm Receipt of the Purchase Requisition's Item(s)

1) Recipient is required to confirm receipt of the item(s) that applied via the PR system. To show the pending receiving report, point to the Purchase Request menu and select the My Shipments report.



2) All the related PR(s) are now listed in the report. Select and click the PR No. hyperlink to show the detail page of the PR.

My Shipments	s - Microsoft Internet Explor	er				
<u>Eile E</u> dit ⊻iew	Favorites <u>T</u> ools <u>H</u> elp					
🌏 Back 👻 📀) - 💌 💈 🏠 🔎	Search 🥂 Favorites Media	🥝 🌛 s	3 🔜 🚜		
ddress 🍯 http:/	//cathy2/PurchaseOrder/MyShipi	nent.aspx			-	> Go 🛛 Links
COA	STER, Coaste	er Co. of America - I	Purchase Req	uisition		
Home	e User Login	Purchase Requisition Purchase Re	port Vendor			
My Shipm	ents (Logged In As G	ilbert Lo)				i
Sort By	Requested Date	▼ Go				
Requested	From	T∘ 3/22/20	06			
Search By	All	 Search Input 		Search		
Pending	g for Receiving O H	Received				
		Click the PR No.	hyperlink			
PR No.	Status Receiv		• •	Vendor	Total Amount	
10103	Shipped	3/15/2006	3/30/2006	AAA Company	\$21,147.72	
<u>10102</u>	POSent	3/15/2006	3/25/2006	AAA Company	\$29,092.29	

- 3) Prior to confirming receipt, you have to upload a copy of the packing slip(s) or shipping label(s)
- Scan the document to your PC first, then at the bottom of the screen, click on "Choose File"
- Select the scanned document from your PC and then click on "Upload"
- The uploaded documents will show on the right had side of the screen

• Finally, click on "Confirm Receipt" to finalize the PR

Jploading Files	Delet	e Selected	Item		
Choose File No file chosen		View	File	PostedDate	PostedBy
pdf, doc, docx, xls, xlsx, jpg, jpeg, gif, txt, zip are accepted. 8 MB is max El upload more file Upload	0	View	PDF	6/7/2022	Katherine Oliver
	0	View	PDF	6/7/2022	Katherine Oliver

4) Click the Confirmed Receipt button and then a message line will be displayed. Click the Yes button to confirm receipt of the item(s) in the PR.

Edit Purchase Requisition - Microsoft Internet Explorer					_ 8 ×	
<u>Eile E</u> dit <u>V</u> iew F <u>a</u> vorite	Eile Edit View Favorites Iools Help					
🕞 Back 👻 💮 👻 💌	👔 🏠 🔎 Search travorites	😢 Media	🔊 · 🔪 🔜 📒 🦓			
Address 🕘 http://cathy2/Pu	Address 🕘 http://cathy2/PurchaseOrder/EditPurchase.aspx?poNo=10103					
COAST FINE PURNT Home Purchase Requisiti	User Login Purchase Requisition	erica - Purc Purchase Per Re ert Lo)	hase Requisition lick the Confirmed eceipt button			
Confirmed Receipt	Show PO APPRO	VED				
PR N∘	10103 Go Reset	PO Status	Shipped 🔽 Hold Cancel			
PR Date	3/15/2006 2:44:02 PM	PO Date	3/15/2006			
ETA / Accircal	300006	D				



5) Then a confirmation box will be displayed.

🚰 Edit Purchase Requisition - Microsoft Internet Explorer	_	8 ×
File Edit View Favorites Tools Help		27
🚱 Back 🔹 💮 🖌 🗾 🐔 🔎 Search 🥂 Favorites 🜒 Media 🤣 😥 - چ 🔜 🧾 🦓		
Address 🙆 http://cathy2/PurchaseOrder/EditPurchase.aspx?poNo=10103	🔽 🄁 Go 🛛 Lin	iks »
CORSTER, Coaster Co. of America - Purchase Requisition A confirmation box]	<u> </u>
Home User Login Purchase Requisition Purchase Report will show up here		
Purchase Requisition - EDIT (Logged In As Gilbert Lo)		
PR No Microsoft Internet Explorer		
PR Date You have confirmed receipt the item(s) for this PR on 3/23/2006 3:33:03 PM		
ETA / Arrival		
Requester 🔽		
Ship To		

Purchase Req	uisition - EDIT (Logged	In As Charli	ie Ngo) Logout
Confirmed Receipt	Email Copy PO Show PO		NOT APPROVED
PR No	17446 Go Reset	PO Status	Requested V Hold Cancel
PR Date	4/18/2013 6:00:41 PM	PO Date	
ETA / Arrival		Received On	
Requester	Test2 Lo - HQ	Recipient	Test2 Lo 💌
Message from webp	page 🛛 🔀		
Are you sure	e you want to copy/duplicate this PO# 17446?		
	OK Cancel		

6) Copy PO feature has been added without manager approval.

7) Description field added to enhance search capability.

	•			······································			
All Orde	rs (l	ogged In A	s Charlie Ngo)				<u>Logout</u>
Sort By	F	Requested Date	~	Go			
Requested I0/22/2012		То	4/22/2013				
Search By Vendor 🖌		*	Search Input	dell			
Description		ıdmi			Search		
*							
				1			
PRNo.	Statu	s Branch	Requester	Requested	Required	Vendor	Total
17433	POSer	nt HQ	Rudy Castillo	4/16/2013	4/16/2013	DELL COMPUTERS	\$18.79
16950	Closed	HQ	Pablo Guevara	12/26/2012	12/26/2012	DELL COMPUTERS	\$2,064.46
				1			

8) When POSent is selected, PO Date will automatically insert current time

PO Status	POSent	Hold	Cancel
PO Date	4/22/2013 1:4	9:34 PM	

9) When user click "Confirmation Receipt" = Yes, Receive date will automatically insert current time

	PO Status	Received Version Hold Cancel
	PO Date	4/2/2013 8:47:47 AM
	Received On	4/2/2013 8:45:39 AM
a.	Recipient	Charlie Ngo 🗸

10) When PO Status is selected "Closed", Close date will automatically insert current date

	APPROVED			
PO Status	Closed V Hold			
Closed Date 04/22/2013				
PO Date				
Received On				
Recipient	Test2 Lo 💙			