

# Purchase Requisition System User's Guide

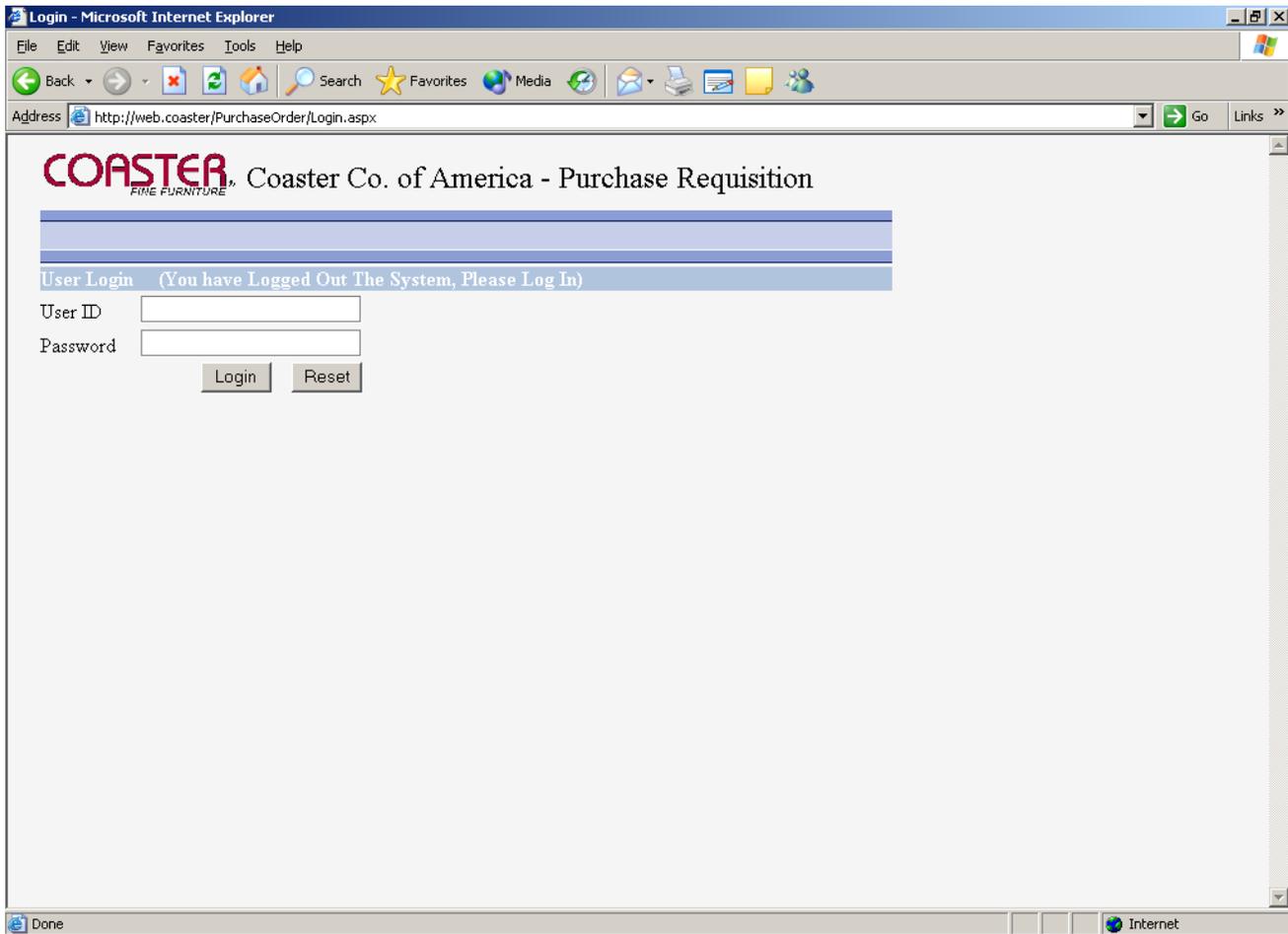
**Prepared By  
BPM  
Department**

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

# Purchase Requisition System User's Guide

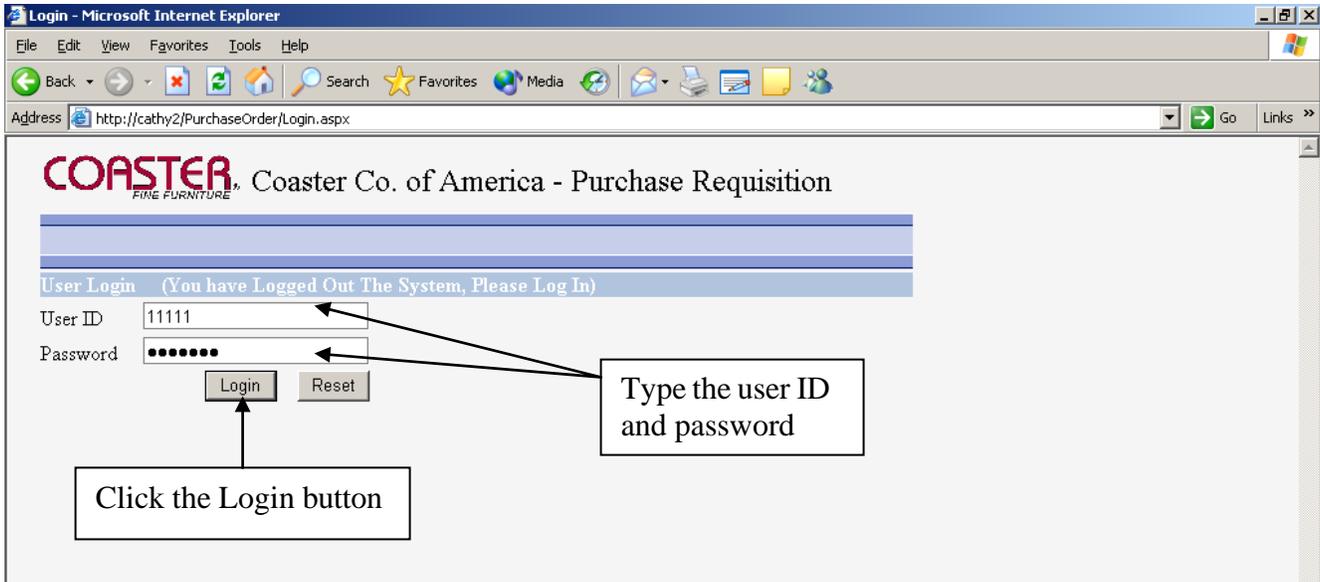
## Access to the Purchase Requisition Application

- 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: <http://web.coaster/PurchaseOrder/Login.aspx>.
- 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.



## 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.



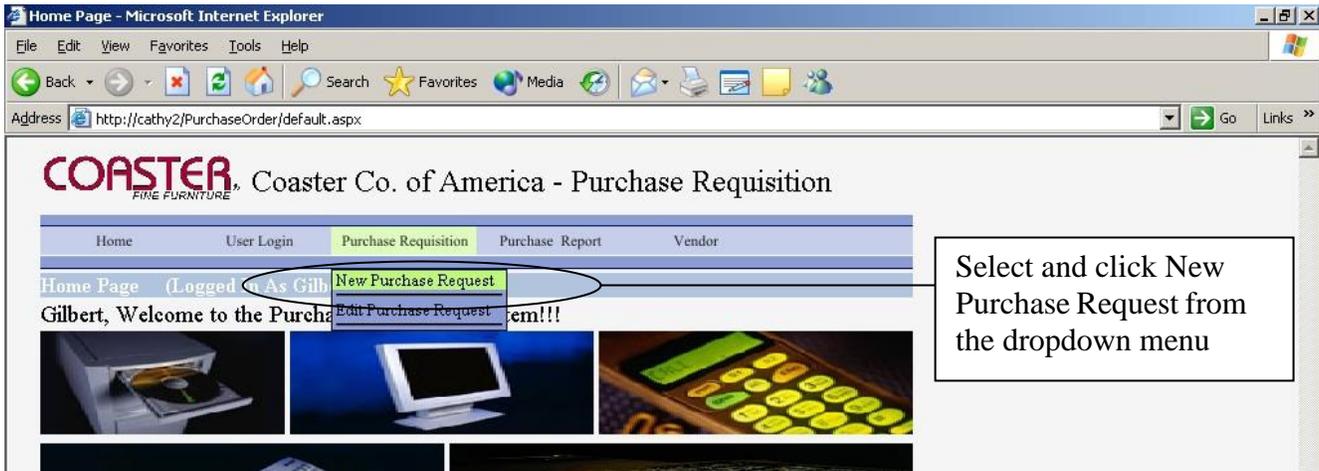
- 4) If the user successfully logs into the system, the name of the user will be displayed in the title bar as below.



# 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.



## 2) Fill out the information in the purchase requisition form

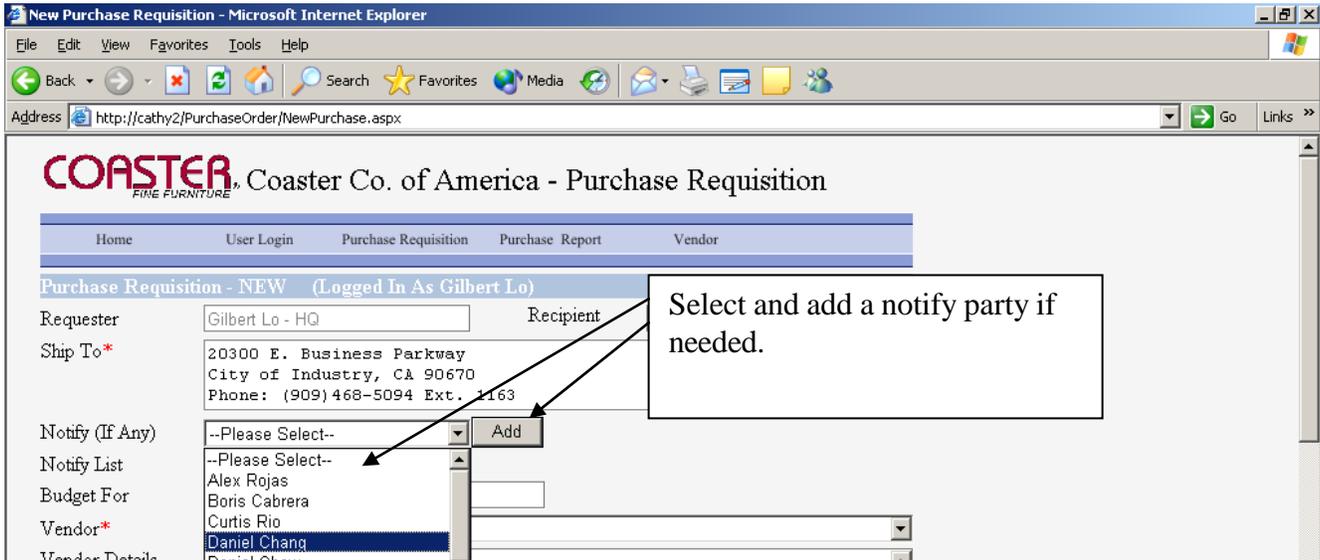
- a) Requester, Recipient and Ship To address are automatically defaulted by the system based on the user's login. In most cases, the user is not required to change the default values. The field of Requester is not allowed to change; however, in case of necessary, the user can choose another recipient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

The screenshot shows the 'New Purchase Requisition' form in a Microsoft Internet Explorer browser. The page title is 'COASTER FINE FURNITURE Coaster Co. of America - Purchase Requisition'. The browser address bar shows 'http://cathy2/PurchaseOrder/NewPurchase.aspx'. The form has a navigation menu with 'Home', 'User Login', 'Purchase Requisition', 'Purchase Report', and 'Vendor'. Below the menu, it says 'Purchase Requisition - NEW (Logged In As Gilbert Lo)'. The 'Requester' field is 'Gilbert Lo - HQ' and the 'Recipient' field is 'Gilbert Lo'. The 'Ship To\*' field is circled and contains the address: '12928 Sandoval Street, Santa Fe Springs, CA 90670, Phone: (800) 221-9699 Ext. 1198'. Other fields include 'Notify (If Any)' with a dropdown set to '--Please Select--' and an 'Add' button, 'Notify List', 'Budget For' with 'HQ' and 'MIS' dropdowns, and 'Vendor\*' with '\*\*\*\*Not Selected\*\*\*\*'. A callout box on the right points to the 'Requester', 'Recipient', and 'Ship To' fields with the text: 'Requester, Recipient and Ship To address are automatically defaulted by the system'.

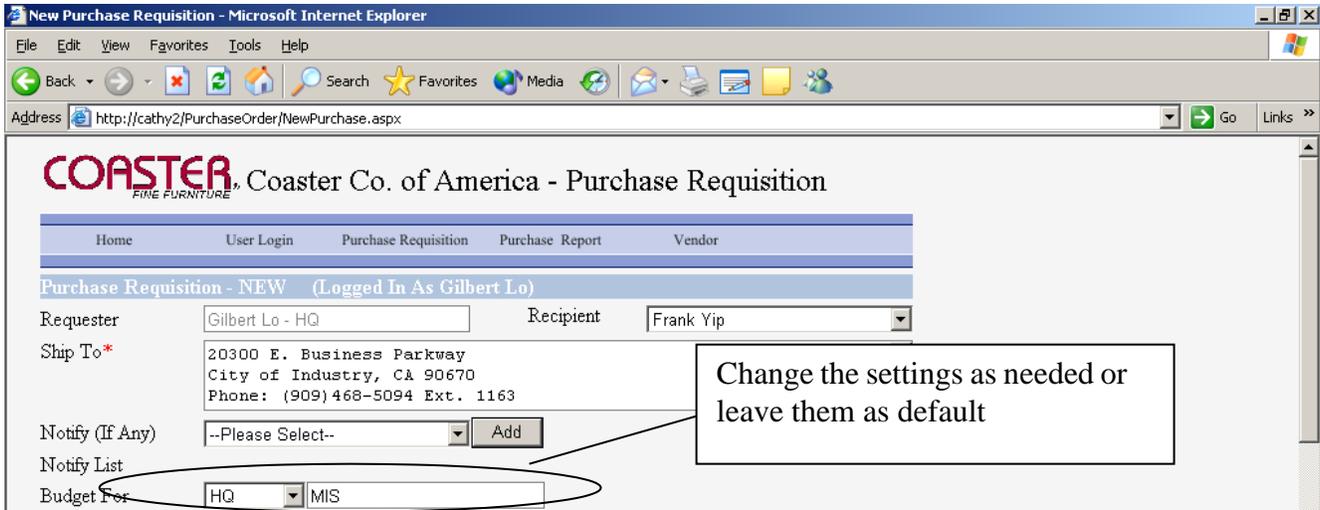
- b) If choosing another recipient, the Ship To address will be also changed to the selected recipient's branch address

The screenshot shows the same 'New Purchase Requisition' form, but the 'Recipient' dropdown is open, showing a list of names: 'Alex Rojas', 'Boris Cabrera', 'Curtis Rio', 'Daniel Chang', 'Daniel Chew', 'Frank Yip', 'Gilbert Lo', 'James Ha', 'Jane Fakava', 'Jennifer Rodriguez', and 'Jessica Tolentino'. 'Frank Yip' is highlighted in blue. The 'Ship To\*' field now displays the address for Frank Yip: '20300 E. Business Parkway, City of Industry, CA 90670, Phone: (909) 468-5094 Ext. 1163'. A callout box on the right points to the 'Recipient' dropdown and the 'Ship To' field with the text: 'If choosing another recipient, the Ship To address will be also changed to the selected recipient's branch address'.

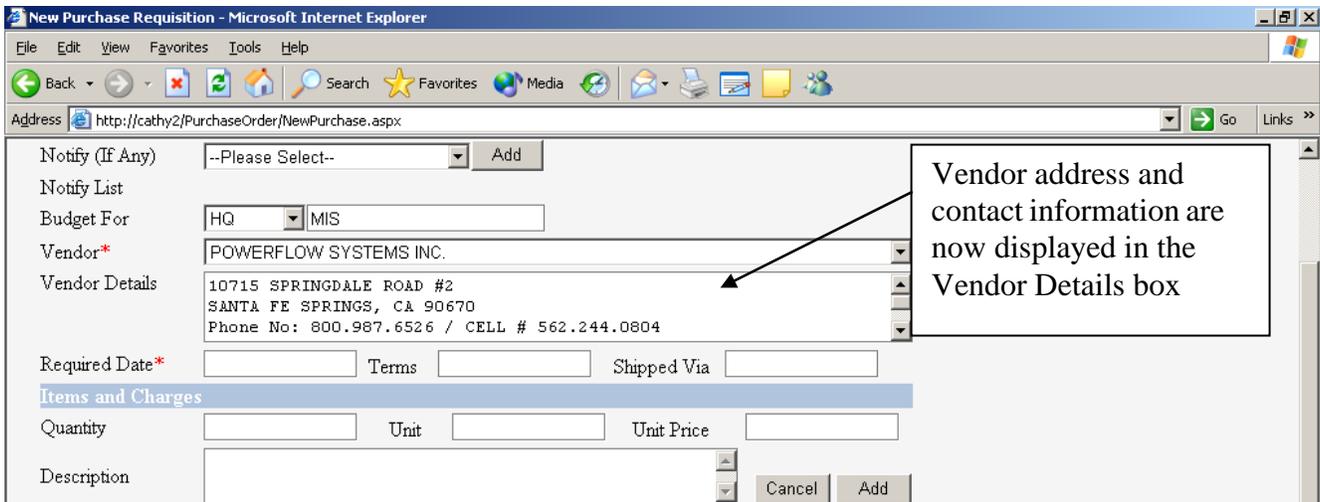
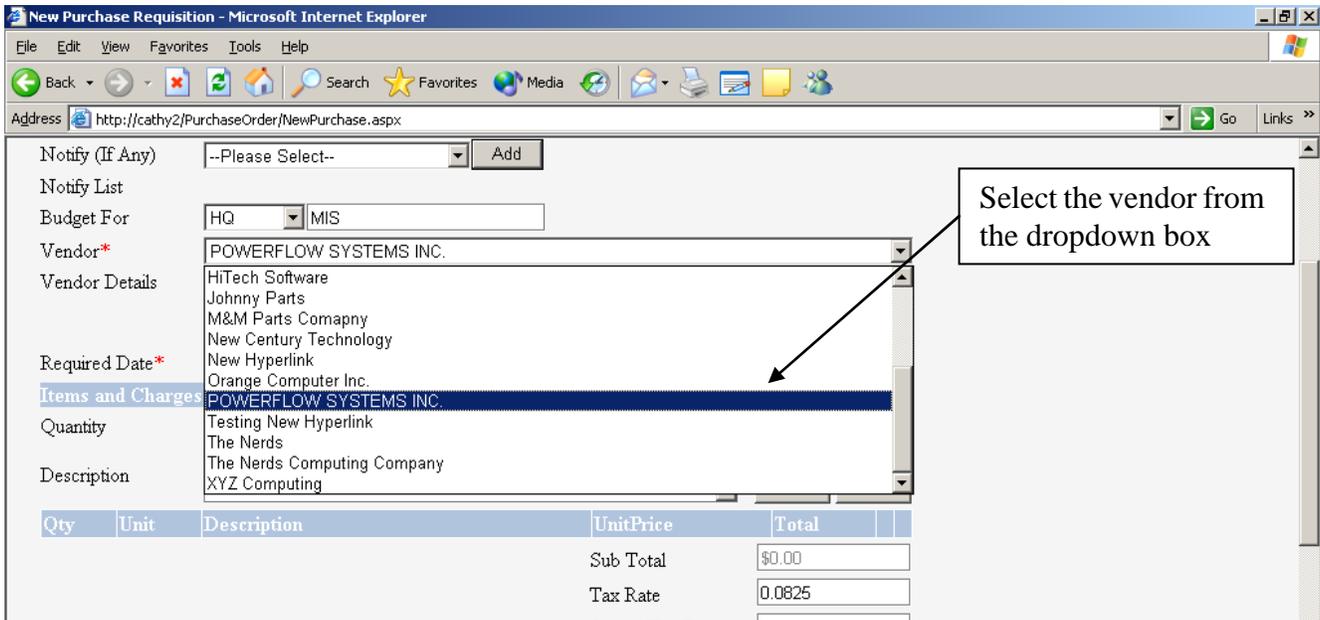
c) The user can add different notify parties in the Notify List if needed or leave it blank.



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.



- 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.



- 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 Requisition - Microsoft Internet Explorer  
Address: http://cathy2/PurchaseOrder/NewPurchase.aspx

Purchase Requisition - 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

Notify (If Any): --Please Select- Add

Notify List

Budget For: HQ MIS

Vendor\*: \*\*\*Not Available\*\*\*

Vendor Details

Select \*\*\*Not Available \*\*\* if the vendor is not in the vendor list

New Purchase Requisition - Microsoft Internet Explorer  
Address: http://cathy2/PurchaseOrder/NewPurchase.aspx

Reset Submit

Quote From Vendor (1)

Vendor: [ ]

Phone No: [ ] Fax No: [ ]

EMail: [ ]

Web Site: [ ]

Address: [ ]

City: [ ] State: [ ] Zip: [ ]

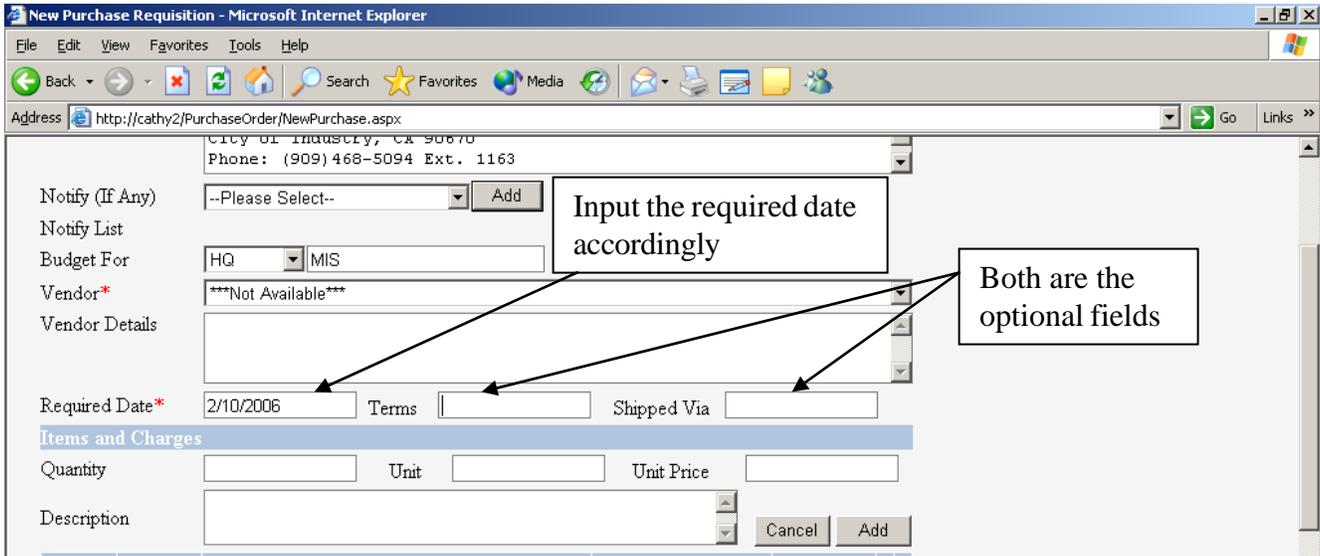
Description: [ ]

Total: [ ] Contact: [ ]

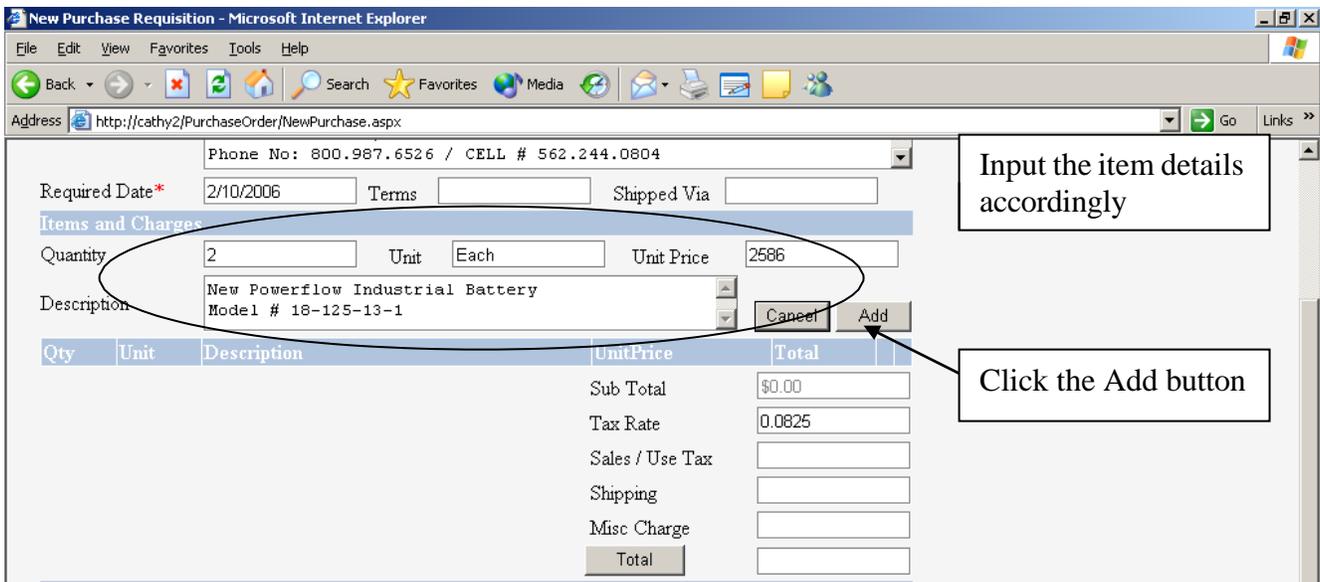
Quote From Vendor (2)

Go to the "Quote From Vendor" section and input the new vendor details

- 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.



- 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



- 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	UnitPrice	Total		
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
					Sub Total	100.00	

a.

Phone No: 800.987.6526 / CELL # 562.244.0804

Required Date\* 2/10/2006 Terms Shipped Via

Items and Charges

Quantity Unit Unit Price

Description

Cancel Add

Qty	Unit	Description	UnitPrice	Total		
2	Each	New Powerflow Industrial Battery Model # 18-125-13-1	\$2,586.00	\$5,172.00	Edit	Delete

Sub Total \$5,172.00

Tax Rate 0.0825

Sales / Use Tax \$426.69

Shipping 0

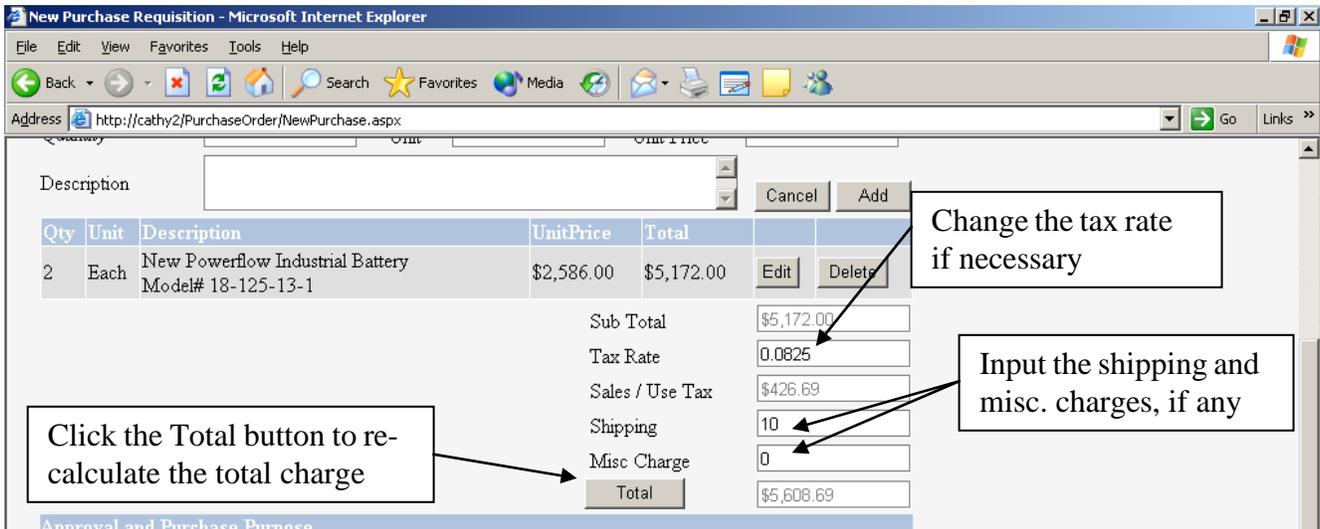
Misc Charge 0

Total \$5,598.69

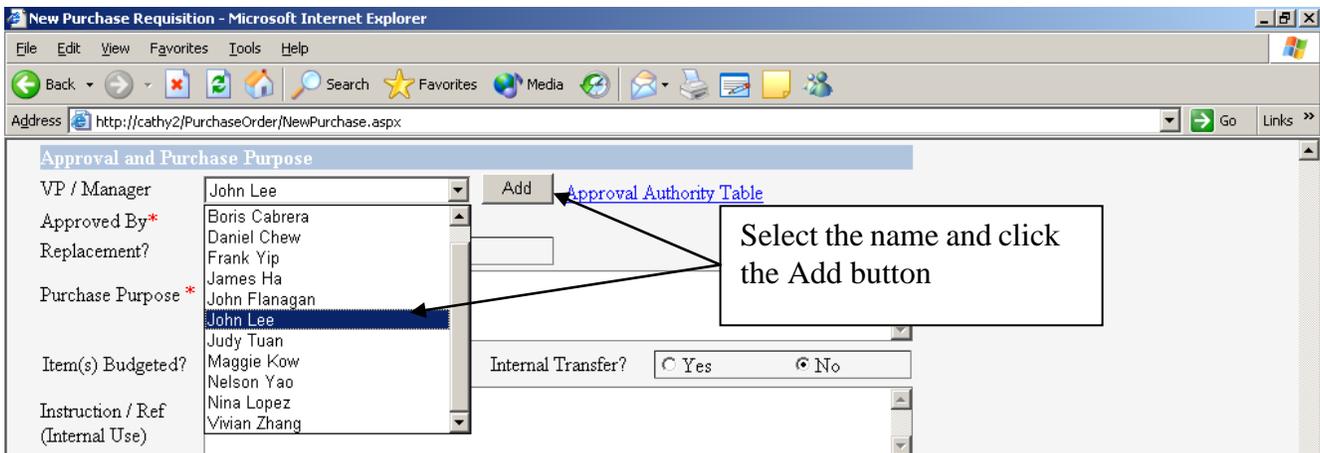
The line item is now displayed here

Click the Edit or Delete button if the user wants to edit or delete the item

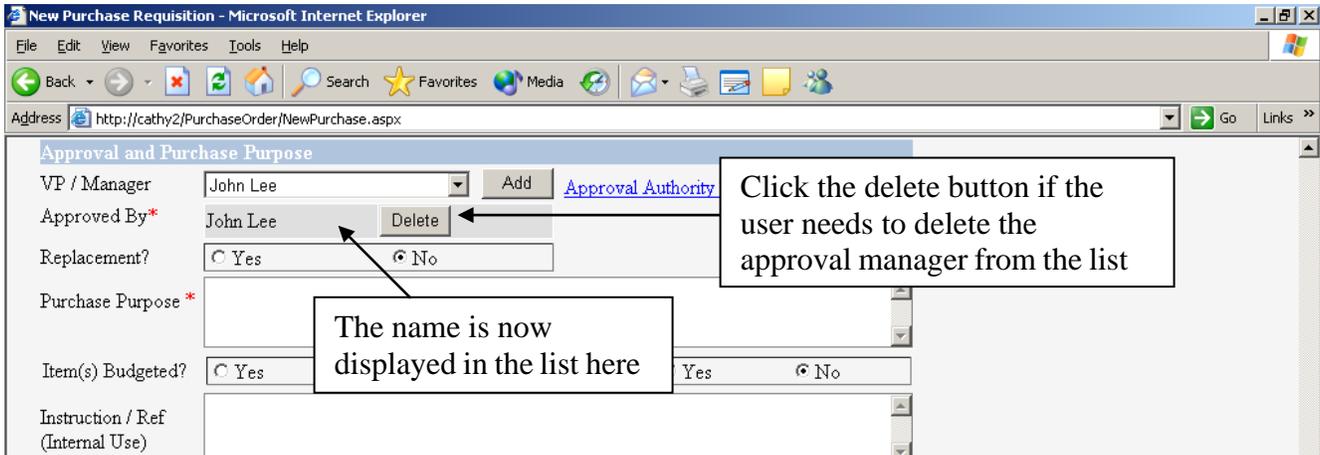
- k) The Tax Rate is defaulted by the system and is based on the default Ship To address's city; however, the user can change it if necessary. If there are any shipping and miscellaneous charges, the user can input them in the Shipping and Misc. Charge fields accordingly. When the Total button is clicked,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



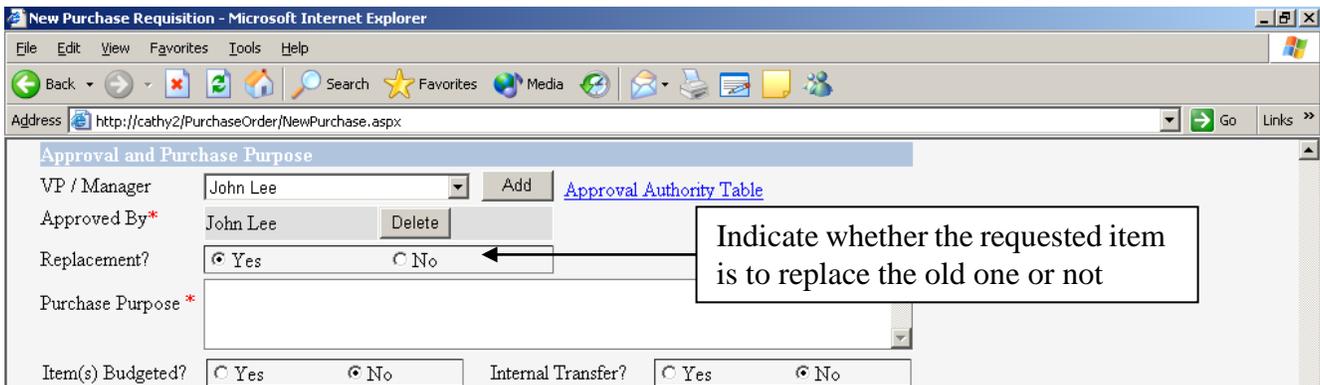
- l) After the user inputs the line item, the next step is to add the approval manager(s). The approval manager(s) can be selected from the VP/Manager dropdown box in the Approval section. After the approval manager is selected, click the Add button to add the name to the list.



- 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.



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



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 to handle this PR after approval? \*

- COD order. Please issue the check
- Email PR to vendor
- 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 Requisition - Microsoft Internet Explorer

Address: http://cathy2/PurchaseOrder/NewPurchase.aspx

**Approval and Purchase Purpose**

VP / Manager: John Lee [Add] [Approval Authority Table](#)

Approved By\*: John Lee [Delete]

Replacement?:  Yes  No

Purchase Purpose\*: To replace the old batteries. Serial# 1234 & 2/2/03

Item(s) Budgeted?:  Yes  No

Internal Transfer?:

Instruction / Ref (Internal Use):

Select “Yes” or “No” to indicate whether the item(s) to be purchased are budgeted or not. The default 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 Requisition - Microsoft Internet Explorer**

Address: <http://cathy2/PurchaseOrder/NewPurchase.aspx>

**Approval and Purchase Purpose**

VP / Manager: John Lee [Add] [Approval Authority Table](#)

Approved By\*: John Lee [Delete]

Replacement?:  Yes  No

Purchase Purpose\*: To replace the old batteries. Serial# 1234 & 1235 - purchased on 2/2/03

Item(s) Budgeted?:  Yes  No      Internal Transfer?:  Yes  No

Instruction / Ref (Internal Use):

Indicate whether the internal transfer is required or not. The default value is "No"

- 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 Requisition - Microsoft Internet Explorer**

Address: <http://cathy2/PurchaseOrder/NewPurchase.aspx>

**Approval and Purchase Purpose**

VP / Manager: John Lee [Add] [Approval Authority Table](#)

Approved By\*: John Lee [Delete]

Replacement?:  Yes  No

Purchase Purpose\*: To replace the old batteries. Serial# 1234 & 1235 - purchased on 2/2/03

Item(s) Budgeted?:  Yes  No      Internal Transfer?:  Yes  No

Instruction / Ref (Internal Use): Please purchase it asap

Input the internal transfer instruction if needed or any messages for internal reference

- 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.

**Approval and Purchase Purpose**

VP / Manager: John Lee [Add] [Approval Authority Table](#)

Approved By\*: John Lee [Delete]

Replacement?:  Yes  No

Purchase Purpose\*: To replace the old batteries. Serial# 1234 & 1235 - purchased on 2/2/03

Item(s) Budgeted?:  Yes  No Internal Transfer?:  Yes

Instruction / Ref (Internal Use): Please purchase it asap

Remark: Coupon# 13579

[Reset] [Submit]

Input the reference information for the vendor here, if any

- 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**

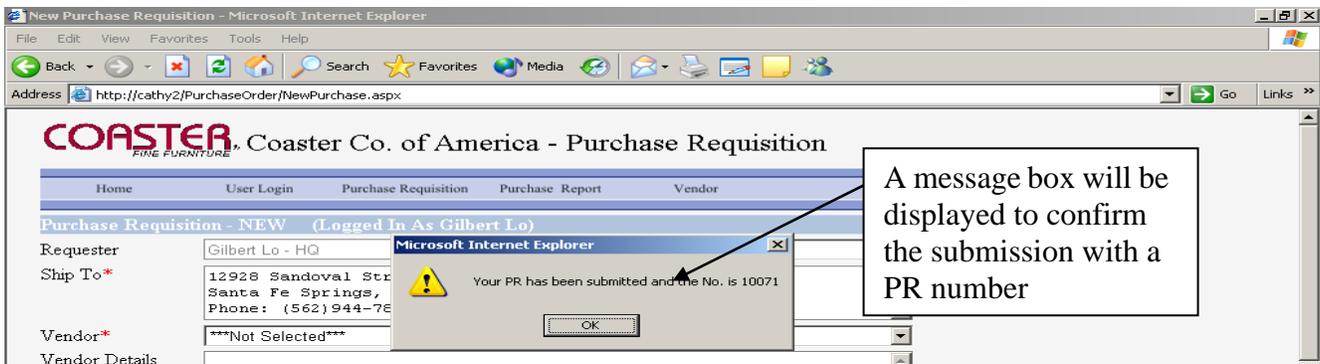
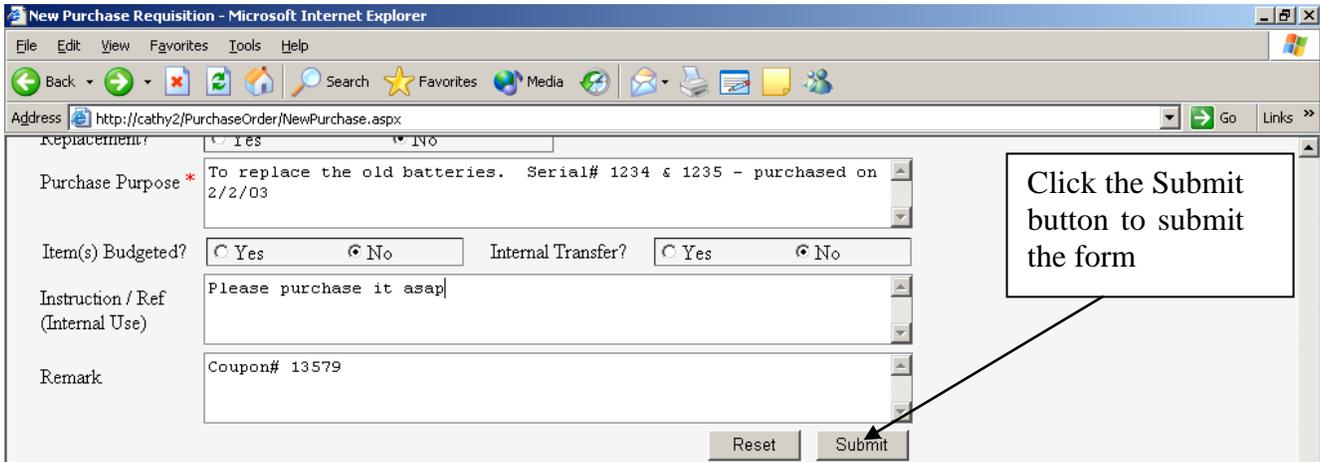
Upload File: d:\Documents and Settings\LA235\Desktop\2158594\_GT-I5500\_.pdf [Browse...]  
pdf, doc, xls, jpg, jpeg, gif are accepted.

Upload File: [Browse...]  
pdf, doc, xls, jpg, jpeg, gif are accepted.

[upload more file](#)

### 3) Submit the purchase requisition form

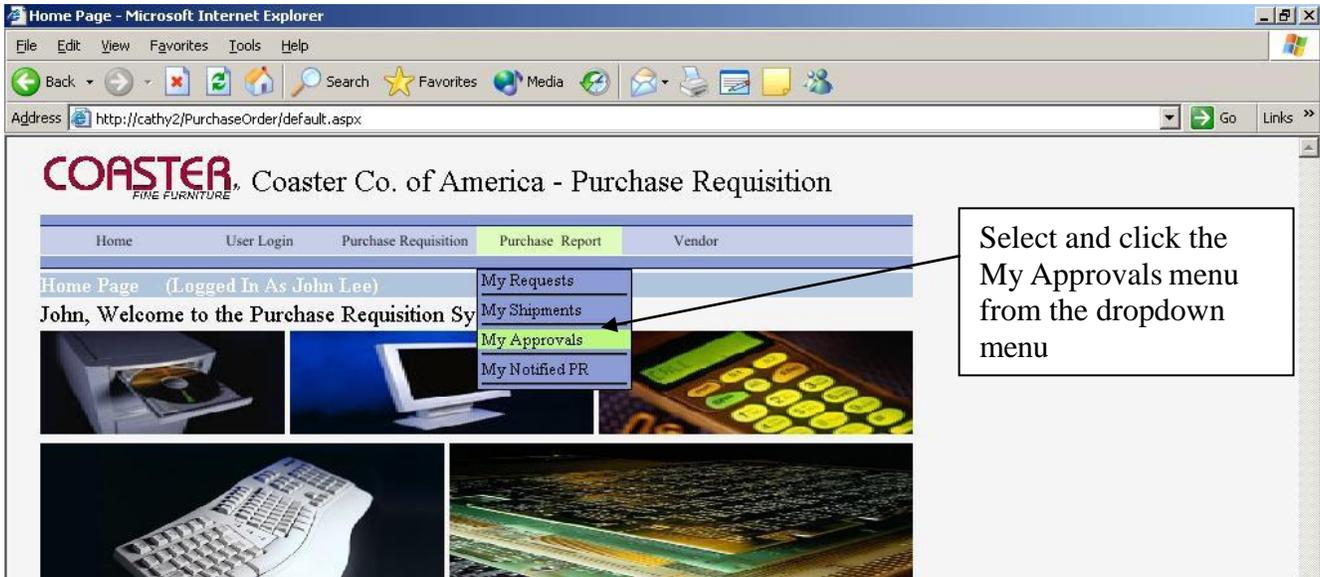
- a) After the user has inputted all the relative information, click the Submit button to submit the requisition form. After that, a message box will show up and confirm the submission with a PR number. The requester, approval manager(s) and notify party (if any) will also receive the confirmation and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



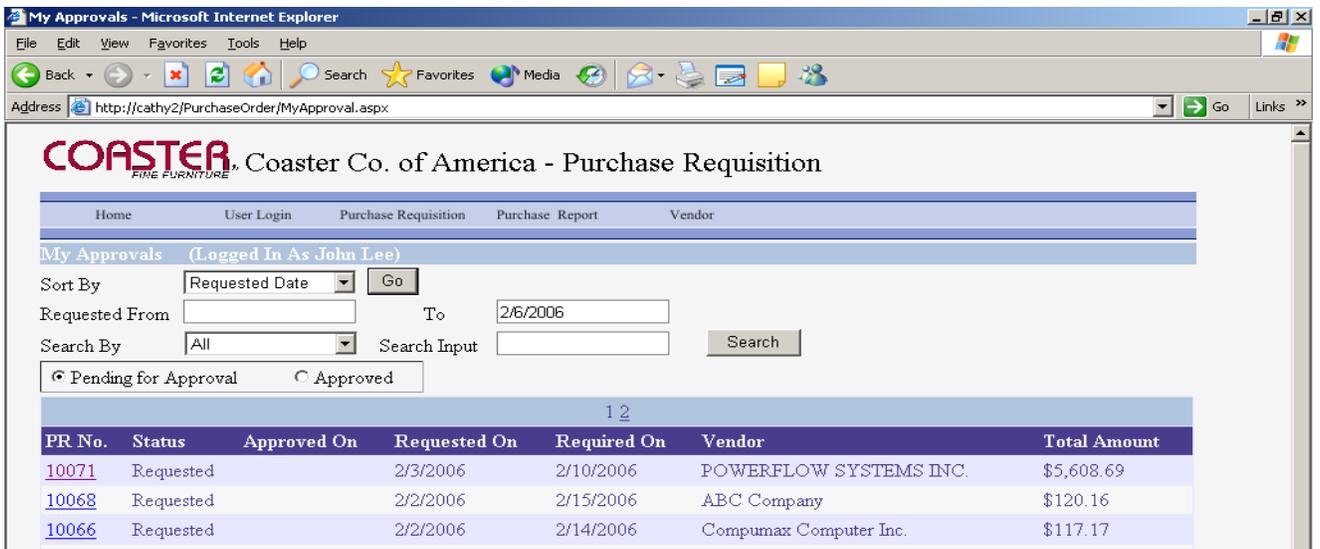
- b) After the PR submitted, any update make to the PR – an email will send to the users in notify list and managers and administrator.

## 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.



4) Then the report will be displayed as below.



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 Approvals (Logged In As John Lee)

Sort By: Requested Date Go

Requested From: To: 2/6/2006

Search By: All Search Input

Pending for Approval  Approved

PR No.	Status	Approved On	Requested On	Required On	Vendor	Total Amount
<a href="#">10071</a>	Requested		2/3/2006	2/10/2006	POWERFLOW SYSTEMS INC.	\$5,608.69
<a href="#">10068</a>	Requested		2/2/2006	2/15/2006	ABC Company	\$120.16
<a href="#">10066</a>	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 Purchase Requisition (Logged In As John Lee)

Confirmed Receipt **NOT APPROVED**

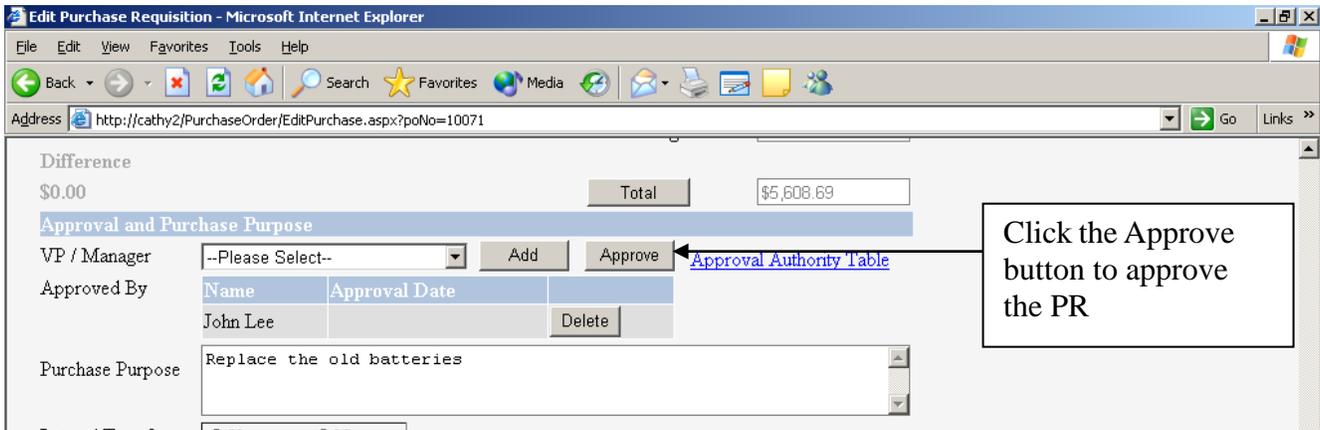
PR No: 10071 Go Reset PO Status: Requested Hold Cancel

PR Date: 2/3/2006 5:05:58 PM PO Date:

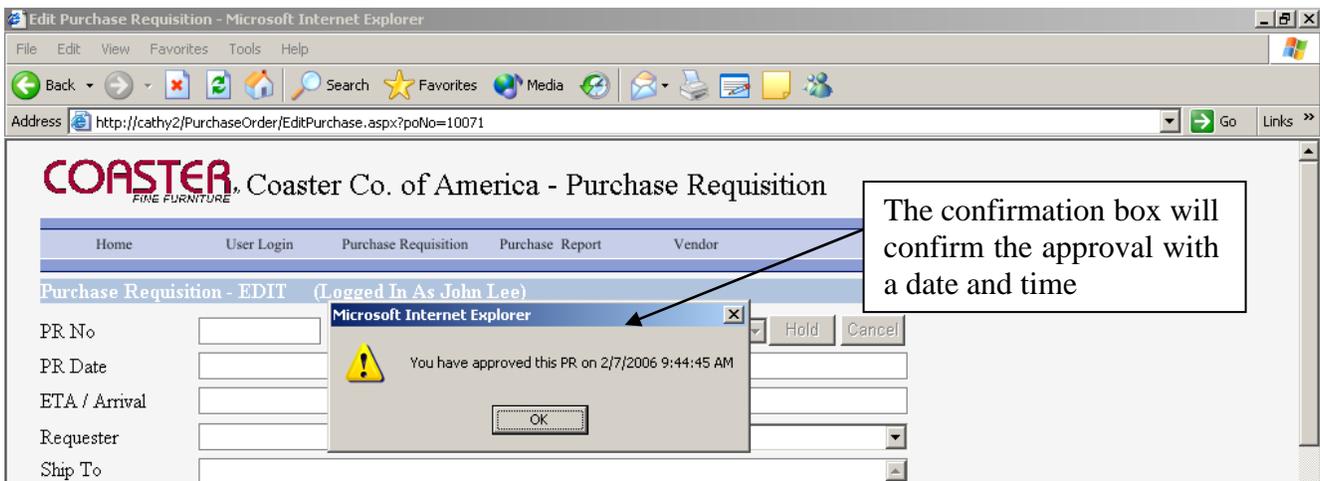
ETA / Arrival: Received On:

Requester: Gilbert Lo - HQ 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.

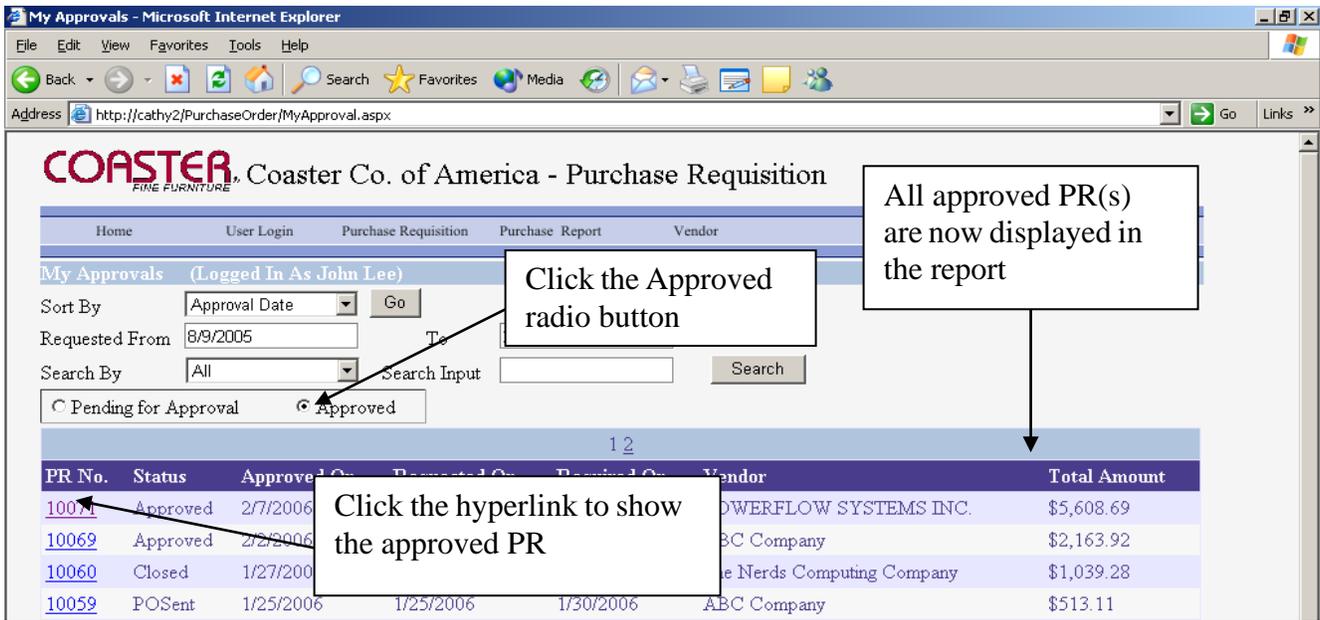


8) Once the Approve button is clicked, the confirmation box will be displayed.

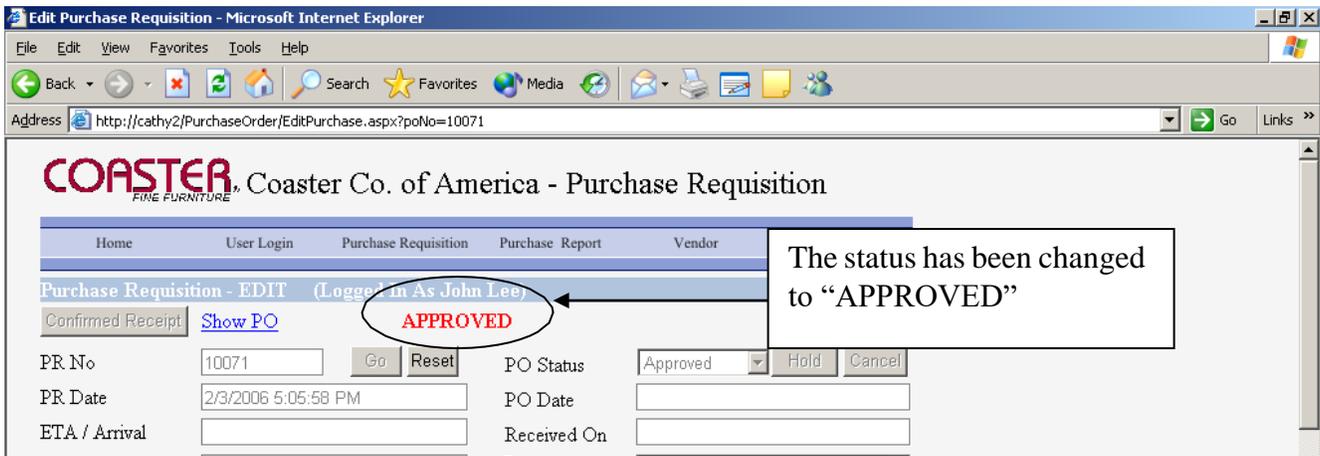


9) If the approval manager needs to check back the details of the approved PR(s), he or she can use the My Approvals report again.

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.

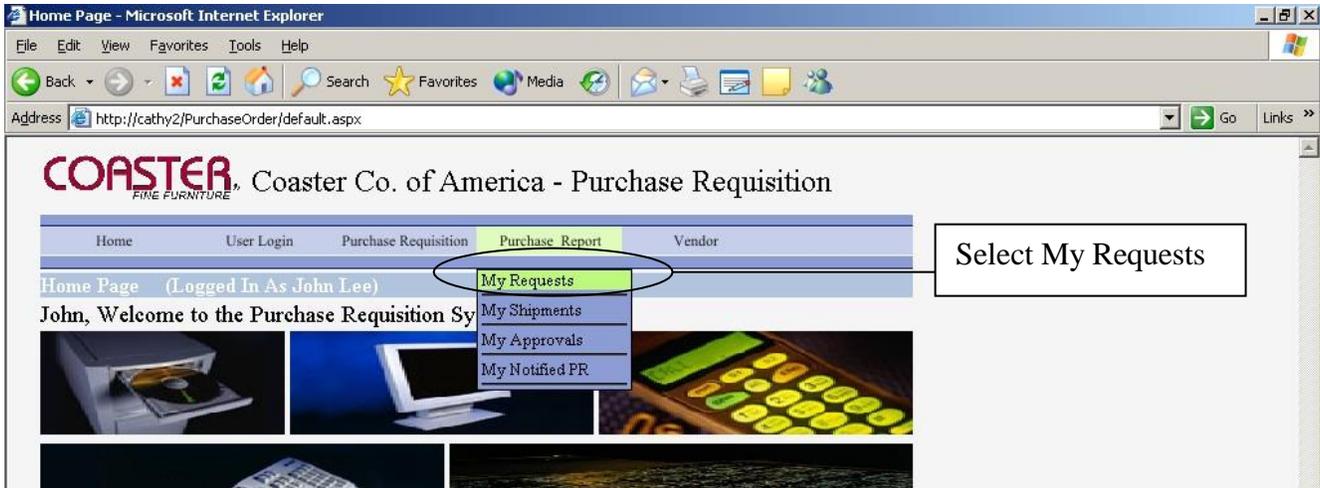


11) The approved PR is now displayed and the status has been changed to “APPROVED”.

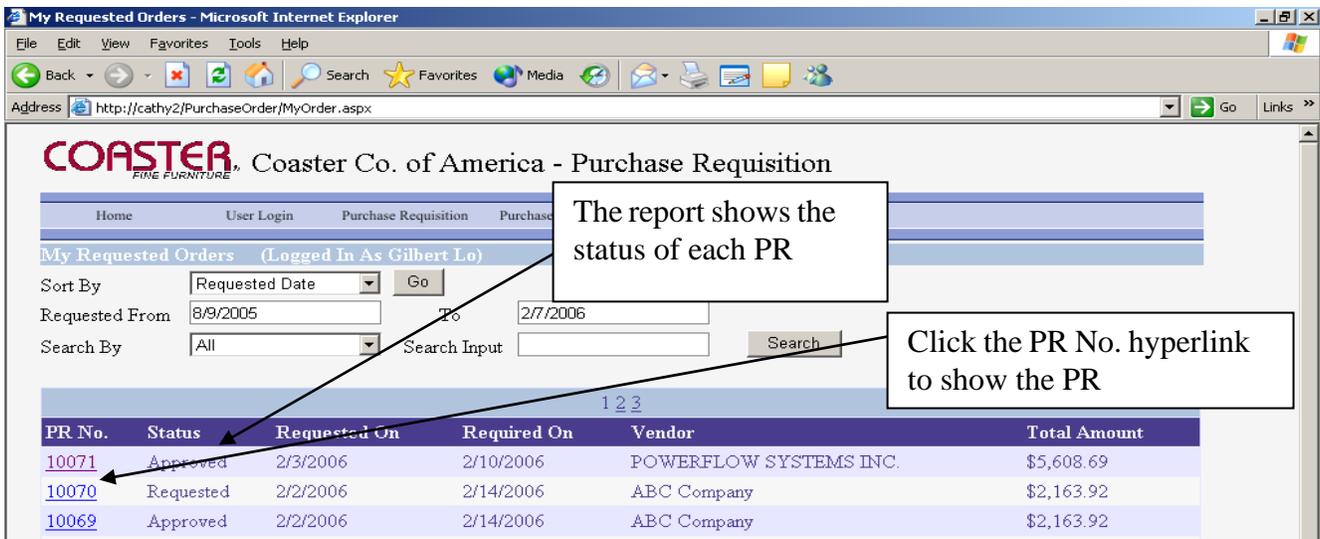


## Search a Purchase Requisition

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.



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

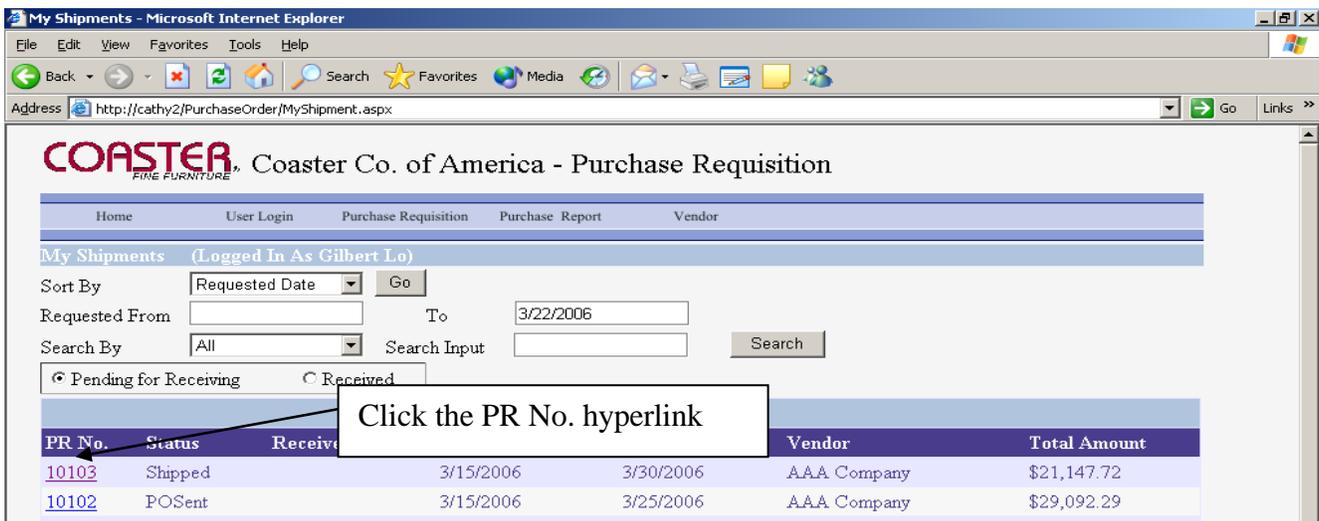


## Confirm Receipt of the Purchase Requisition's Item(s)

- 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.

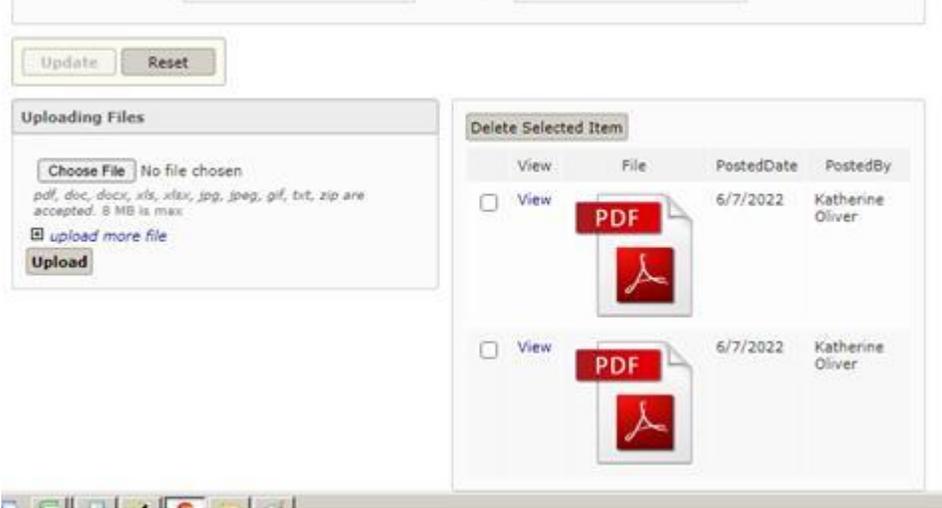


- 2) All the related PR(s) are now listed in the report. Select and click the PR No. hyperlink to show the detail page of the PR.

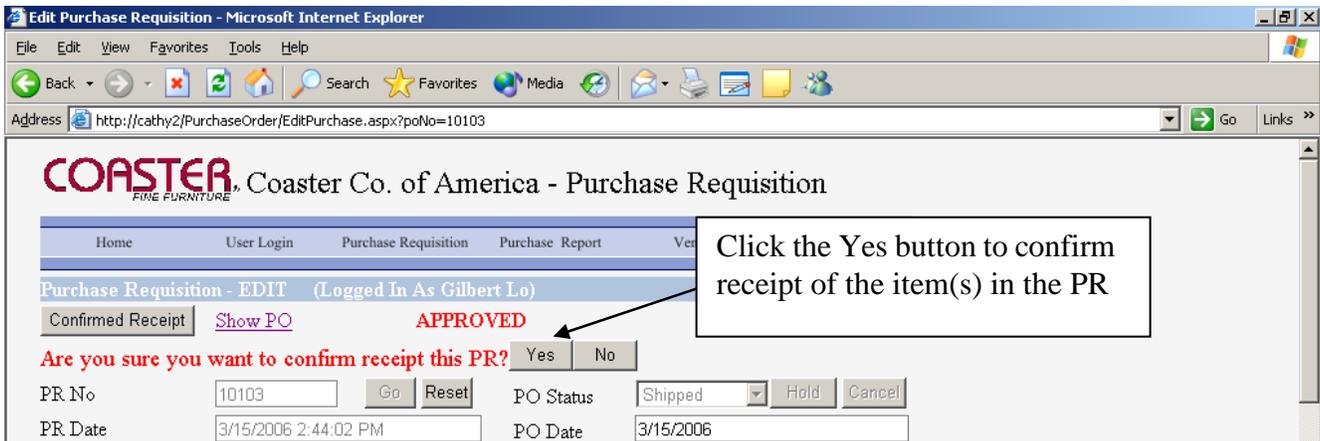
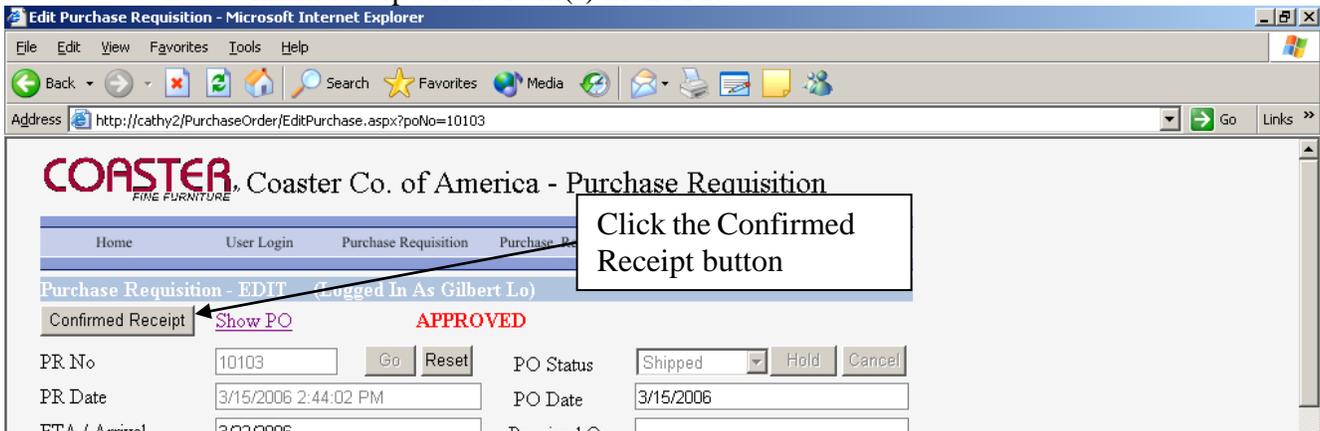


- 3) Prior to confirming receipt, you have to upload a copy of the packing slip(s) or shipping label(s)
  - Scan the document to your PC first, then at the bottom of the screen, click on "Choose File"
  - Select the scanned document from your PC and then click on "Upload"
  - The uploaded documents will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

- Finally, click on “Confirm Receipt” to finalize the PR



- 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.



- 5) Then a confirmation box will be displayed.

Microsoft Internet Explorer window titled "Edit Purchase Requisition - Microsoft Internet Explorer". The address bar shows "http://cathy2/PurchaseOrder/EditPurchase.aspx?poNo=10103".

The page header includes the logo for **COASTER FINE FURNITURE** and the text "Coaster Co. of America - Purchase Requisition".

Navigation tabs include: Home, User Login, Purchase Requisition, and Purchase Report. The current page is "Purchase Requisition - EDIT (Logged In As Gilbert Lo)".

Form fields on the left include: PR No, PR Date, ETA / Arrival, Requester, and Ship To.

A confirmation dialog box is displayed in the foreground with the following text:

**Microsoft Internet Explorer**

 You have confirmed receipt the item(s) for this PR on 3/23/2006 3:33:03 PM  
Please send the POD to the Finance department ASAP

Buttons: OK, Cancel

An annotation box with the text "A confirmation box will show up here" has an arrow pointing to the dialog box.

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

Purchase Requisition - EDIT (Logged In As Charlie Ngo) [Logout](#)

Confirmed Receipt    **NOT APPROVED**

PR No: 17446   PO Status: Requested

PR Date: 4/18/2013 6:00:41 PM PO Date:

ETA / Arrival:  Received On:

Requester: Test2 Lo - HQ Recipient: Test2 Lo

Message from webpage

Are you sure you want to copy/duplicate this PO# 17446?

7) Description field added to enhance search capability.

All Orders (Logged In As Charlie Ngo) [Logout](#)

Sort By: Requested Date

Requested From: 10/22/2012 To: 4/22/2013

Search By: Vendor  Search Input: dell

Description:

1

PRNo.	Status	Branch	Requester	Requested	Required	Vendor	Total
<a href="#">17433</a>	POSent	HQ	Rudy Castillo	4/16/2013	4/16/2013	DELL COMPUTERS	\$18.79
<a href="#">16950</a>	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

PO Date: 4/22/2013 1:49:34 PM

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

a.

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

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

**APPROVED**

PO Status	Closed	▼	Hold	Cancel
Closed Date	04/22/2013			
PO Date				
Received On				
Recipient	Test2 Lo ▼			