

Waitsfield School: Purchase Order Process

Updated June 2018

- After identifying items you wish to order, fill in relevant information *electronically* on a [purchase requisition](#) ([click this link](#) for a copy of the purchase requisition form -- and BE SURE to NAME your copy!). **Please check out the direction tab at bottom of the template. It guides you through filling in the template correctly** so that Kathi will be able to upload it successfully and not have to retype it.
- Please PUT A ZERO in each of the Warehouse and Grant columns. Tax will always be zero (**MAKE SURE TO PUT THE 0 IN THE COLUMN**).
- Find your account number on sheet two and please type it in using the dots.
- For orders that have too many items to type, you might be able to export or copy and paste portions of the order form from the company into our requisition template. (See Eric for help). Or, you can make a copy of a shopping cart with prices. **Be sure to include the total** on your shopping cart. Give the copy to Kathi making sure you have listed the company name, remittance address, fax number and phone number.
- Add shipping and handling on a separate line (right under the last item you ordered-do not skip a space) and put the amount in the freight column. YOU MAY NEED TO PUT A 1 IN THE QUANTITY SECTION. Kathi will divide it out when she creates the requisition. **Please be sure to check and add shipping and handling costs....these can add significant cost to the purchase order.**
- **SHARE electronically with Kathi.** Include in the note section (the message that google allows you to add when you share a document) the company's name, remittance address(you may need to make a phone call on this as ordering address and payment address are often not the same), fax number and phone number. **PURCHASE ORDERS CAN NOT BE PROCESSED WITHOUT THIS INFORMATION. If we have ordered with this company before, you need only include the company's name.**

Please note that purchase order numbers can not be given in advance of providing this required purchase order information. Purchase orders generally take 1-2 days to process during the school year. It might take a little longer during the summer due to vacation hours.

Kathi will upload your requisition template to the Tyler accounting system software, where it is reviewed by Kaiya and forwarded along to Central Office to have a purchase order number assigned. Once the purchase order is assigned, Kathi will print the PO and complete the order by faxing/online ordering or mailing. You may also let her know if you have a cart saved on line and just need a PO#(Eric does this with Ingram books) to complete the order. That way we won't replicate the order. She will put a copy of the PO in your box noting when it was ordered.

Thank you in advance for helping make this process flow smoothly.

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** **AMAZON ORDERS:** if you are ordering from Amazon, you should create a “wish list” in Amazon and share it with Kathi. This allows her to order the exact items you want. In addition, please give her a copy of the wish list. Kathi has to attach it in the Tyler program.

** Large **WB MASON** and **SCHOOL SPECIALTY** supply orders: complete a shopping cart and **submit it** for approval(save it, too). If you have lost your login ID information such as user name, let Kathi know as she has a list for School Specialty. User name for WB Mason is your email address. Please make a copy of the shopping cart and give it to Kathi so she can submit it to Tyler. If you are only ordering 1-5 items, please prepare the template as in step#1 above. WB Mason doesn't have everything School Specialty has. So, if you can't find it on WB MASON, feel free to order from School Specialty.

2018-2019 orders will be faxed/ordered after June 30th. Kathi can hold them for you if you want to turn in the order before then.