




Purchase Order Requests via the Business Application

Logging In:

Step 1: Log into the Vista Iowa Business Software at <https://www.vista-iowa.com>

Step 2: Click PO in the menu bar or in the menu list.

Step 3: Take note of any messages on the Home Page. Screen level help is available using the help icon  near the top right corner of each page.

Entering Requests:

Step 1: Click on  New Request near the top of the left-hand menu.

Step 2: Begin entering data on the screen. All fields marked with a red asterisk (*) are required fields.

New Request field descriptions:

- **VENDOR:** Enter a portion of the vendor name and press TAB to see a list of vendors from which to choose. The asterisk (*) can serve as a wildcard character. The vendor address is displayed after choosing the vendor.
- **SHIP TO:** Choose the appropriate location from the drop down menu.
- **KEYWORDS:** Enter a few key words to help the approver identify this Purchase Request.



- **YEAR:** Make sure the Year field shows the year in which the Purchase Order needs to be placed. This is especially important to verify when entering Purchase Requests that are for the next school year.
- **NEEDS APPROVED BY:** Make sure the Needs Approved by box shows the correct approver for this Purchase Request. The user may have several approvers in the list if they have a wide range of job duties.
- **COMMENTS:** These fields are not required, but the user should make note of any special circumstances surrounding this purchase in the comments fields. Internal comments will not appear on the printed Purchase Order. An example Shipping Comment might be “DO NOT SHIP UNTIL AFTER JULY 1”.
- **REQ BY:** Defaults to the user, but can be changed to another name if necessary.
- **QUANTITY:** Enter the number of items you wish to order.
- **UNIT PRICE:** Enter the price per unit.
- **DESCRIPTION:** Enter the description of the product in such a manner that it will make sense to both the vendor and the approver. This description appears on the printed Purchase Order form.
- **ACCOUNT:** If the user has a short list of assigned codes, simply click the down arrow and then click on the appropriate code. Note that there is a textual description associated with each code.
 - If you have a search window, as shown below, you can type either text or partial account codes into the search field in order to limit the search.

Account [E] (select one) * Amt 0.00

- For example: Entering Perkins in the search field and pressing TAB returns only Perkins related codes as shown below:

Account [E] Perkins * Amt 0.00

Ext \$

----- expense accts -----	
(select one)	
E10-3272-1300-300-4531-612	Instructional Supply__Perkins Title lic__Business/
E10-3272-2213-300-4531-331	Conference/Wksp Fees__Perkins Title lic__Business/
E10-3272-2213-300-4531-594	Perkins Training from LEA



The AMT field will be filled automatically based on the quantity and price. If the user wishes to split the expenditure among multiple account codes, the user can enter an amount less than the total to be applied to the first account code. Additional lines will appear in order to allow the user to code the entire balance of the purchase request line.


Step 3: Click **ADD REQUEST** to add this line to the Purchase Request. The information will show at the bottom of the screen in the Request List. You can continue to add lines to your request by adding new information to Quantity, Unit Price, Description and Account and then pressing ADD REQUEST. The additional lines will be added to the Request List at the bottom of the screen.

Step 4: Click **RELEASE FOR APPROVAL** when all lines have been added to the Purchase Request. This button is available at both the top and bottom of the screen for easy access. **The Purchase Request cannot be approved until it has been released by the requestor.**



Monitoring Your Request:

Once the Purchase Request has been released, you will see it in a status list on your HOME  screen. Note that in the list below, request number 351418 has been approved and PO 170850 has been printed. Request number 366543 was approved by the first level approver and is awaiting final approval. Request  366571 is not yet approved and is pending. Clicking on the lock allows the user to take control of the request and make changes. *If changes are made, the Purchase Request must be released again.*

HISTORY OF ACTIVITY SINCE 1/2/2017						
Request #	PO #	Vendor	Total	Enter/Order		Status
361418	170850	Bank Of America	108.99	01/09/2017		printed
366543		Quill Corporation	236.72	02/01/2017		OK
366571		Quill Corporation	38.17	02/01/2017		pending

Updating an Unfinished Request:

You may stop and return to an unfinished Purchase Request under [PO::Data Entry::Purchases Request List](#). Select the request and continue working until completed, and then click the **RELEASE FOR APPROVAL** button.

Requests Needing Changes:

If a request has been sent back for changes or questions, the user will see the request highlighted in yellow on the home screen:

361207	Kirkwood Community College Bookstore	373.00	12/07/2016	Changes Needed
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You will also be notified via email if a Purchase Request has been returned for changes or denied. To make the necessary changes to a Purchase Request, go to [Data Entry Panel::Purchase Request List](#), click on the request needing changes, update, and **RELEASE FOR APPROVAL** again so it is available to the approver.

Copying a Purchase Order:

Go to [Data Entry:: Copy a Purchase Order](#) to copy an existing purchase order to save data entry time. Select the purchase order and click on the **COPY TO NEW REQUEST** button. It will then show in the Purchases Request List. You will need to modify any incorrect data, such as quantity, price, account number to be charged, and/or approver. Remember you will need to select the **RELEASE FOR APPROVAL** button when all changes are complete.