ENTERING A
PURCHASE REQUISITION
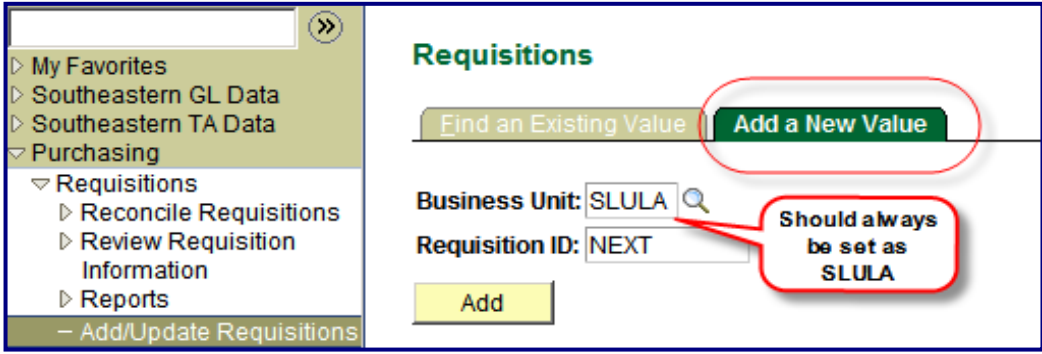## In PeopleSoft Financials

PLEASE NOTE: *For purchases that must be approved by more than one budget unit head, use the "Multi-Budget Unit Head Purchase Request" form found on the Purchasing Department web page. Do not enter a PeopleSoft requisition.*

1. After logging in to PeopleSoft Financials, navigate to **Add/Update Requisitions**:
   Purchasing -> Requisitions -> Add/Update Requisitions

2. Click on the *Add a New Value* tab. The Business ID must be **SLULA** and the Requisition ID must be **NEXT**.
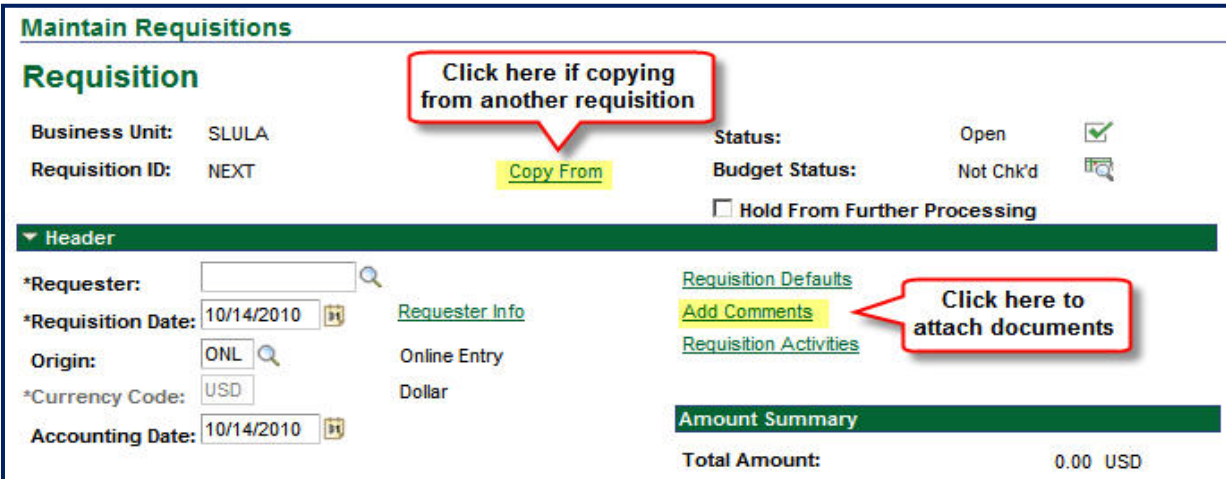
3. In the *Header* section of the **Requisition** screen of the *Maintain Requisitions* page, fill out the *Requester, Requisition Date, & Accounting Date.* Then click on *Requisition Defaults.* Note: To copy from another requistion, click on *Copy From* before choosing *Requisition Defaults.*

4. On the *Default Options* section, check the **Override** option. Then complete the *Buyer, Vendor, Category, Unit of Measure,* and confirm that *Vendor Location* is "1".
    (Note: If vendor # is not in the system, complete a PeopleSoft Vendor Request form found on the PeopleSoft Financials webpage located in Leonet. For "To be Bid" purchases, use vendor number 0000002107, "TOBEBID".)

5. In the *Schedule* section, complete the *Due Date. Your Ship To code will automatically appear and should not be changed.* In the *Distribution* section, complete the *Speedchart #* field - which is the same # as the Budget Unit #. *For instructions on creating a requisition that is paid by more than one budget with the same budget unit head, refer to the Training Topics link on the PeopleSoft Financials webpage.* Click on the **OK** button to return to the Requisition page.

6.   Back on the **Requisition Header** screen, click on the *Add Comments* link. Attach any documents required by Southeastern's Purchasing Dept. to the **first** comment. Click on the "plus" icon ⊞ to add more comments *without* attachments.

7.   In the *Line* section, enter item information in the *Description, Quantity,* and *Price* fields. Use the bubble icon for line comments. If more than one item is being purchased, click on the *"plus"* ⊞ icon.

8.   After all information has been entered, click on the **Save** button. Make sure the status changes to *Pending* .

      If it does not change to Pending, click the ☑ box on the status line.