

Purchase Order Request Process For Teachers

1. Go to McIntosh County Schools Website
2. Scroll down to **Eforms** and click it
3. Sign in with your user name, password(just like you would log into your computer), and the last four digits of your social
4. Click on the “**library**” icon at the top left
5. “**Purchase Requisition Form**” will appear – click on it & the form will load on the right (wait for it to completely load)
6. The **date & purchase request #** (REQ#) will populate – **YOU CANNOT CHANGE THE DATE**
7. In the upper right where it says “Director/Principal”, complete your department & name (ex: Vocational/Loder, Title I, Grade 3-teachers name, etc.)
8. The **Billing Information** is pre-populated – no changes necessary.
9. The **Shipping Information** requires you to select from the drop down box–choose your school or department location.
10. For the **Vendor Information** scroll the drop down to the vendor you need and click the name. It will populate the address. In the attention or contact line you may indicate a salesman’s name, etc. **HOWEVER**, if you can’t find the vendor or you know it is a new vendor, you **CANNOT continue** with the PO request until Mrs. Vickers gets them put into the system. At the bottom of the screen in the far right corner there is a “Cancel” button. Click cancel and then you will need to email the vendor information (Name, Mailing Address, Fax & Phone #) to dvickers@mcintosh.k12.ga.us
11. Once she has the information in the system, she will email you back to let you know that you can begin the PO request again.
12. The **Funding Source** is a place for you to put a description of what you are ordering. In this section also include the fax number or email address for ordering so it can be added for the future purpose of automatic faxes of purchase orders. *Softdocs is awaiting an update from PCGenesis that will allow the automatic faxing & emailing of purchase orders. Mrs. Vickers will notify me/you when this process will be available.*
13. In the **Product Information** section enter the quantity, item number, description, & unit price. Hit the tab key and it will populate the total amount for you. Click on the plus sign to add as many line items as needed.
14. You can attach scanned quotes or additional information by clicking on attachments at bottom of page, browse, and click on desired document, click to attachment side, then click submit.
15. Once you have your “**Grand Total**” you will send the request to your school bookkeeper. At the end of the page under the word “*History*” you should see a drop down box with your school bookkeeper name in it (Route –Name). To the right of their name will be a “**Send**” button. Click it and the process for teachers is complete.
16. You can track the progress of your request by clicking on the file folder on the top left (submitted) and when the process has completed and a purchase order created you can click on the file folder with the red check (completed).