How To – Purchase Orders
SchoolTools©

<u>Prerequisites</u>:

1. All users and rights must be defined using **CONFIGURATION>Users**.
2. Starting purchase order number must be defined using **CONFIGURATION>Notifications and Settings**. This is the district-wide starting purchase order number.
3. Contact information for each campus must be defined using **CONFIGURATION>Notifications and Settings**.
4. PO super administrator and PO business manager must be set for each campus, including campus ID = 000 using **CONFIGURATION>Notifications and Settings**.
5. Signatures for PO super administrators for each campus must be submitted to SchoolTools© info@mcoschooltools.com for integration into the purchase order system.
6. School logos for each campus must be submitted to SchoolTools© info@mcoschooltools.com for integration into the purchase order system.
7. PO strategies must be defined using **CONFIGURATION>PO Strategies**.

<u>User Rights for Purchase Orders:</u>

- **isPOSuperAdmin** - Approves purchase order requests made by staff members. Users with this right can approve/deny purchase order requests using **ADMINISTRATION>Purchase Orders**. This is typically the superintendent or principal at smaller schools. It may be the chief financial officer (CFO) at larger schools.
- **isPOBusinessAdmin** – Business manager/superintendent or chief financial officer (CFO) who processes purchase orders and assigns purchase order numbers using **PURCHASE ORDERS>PO Log**.
- **isPOCreator** – Users with this right can create/edit a purchase order request using **MY APPS>My Purchase Order Requests**. This right is typically assigned to all full-time staff.
- **isPOMonitor** – Generate detailed purchase order reports using **REPORTS>Purchase Orders**. This right is typically assigned to administrators, business managers and staff, chief financial officer (CF), and possibly school board personnel.

How To Use Purchase Orders:

1. A staff member having the right **isPOCreator** creates a purchase order request using **MY APPS>My Purchase Order Requests**.
2. Users having the right **isPOSuperAdmin** and designated as the PO super administrator for the campus from which the request was made either approves or denies the request using **ADMINISTRATION>Purchase Orders**. Approved requests are forwarded to the PO business manager.
3. Users having the right **isPOBusinessAdmin** and designated as the PO business manager for the campus from which the request was made processes the approved request using **PURCHASE ORDERS>PO Log**. A purchase order number is assigned and the original requestor is notified that the purchase order is ready for printing. The PO business manager can modify the purchase order (quantities, prices, etc.) and include budget codes and additional information.
4. Users with the right **isPOMonitor** can print detailed purchase order reports using **REPORTS>Purchase Orders**.