

# B+ Purchase Request Guide

Logging In



Select B+ Icon in the Classlink Screen

Welcome to  
**BusinessPlus**

Username

Password

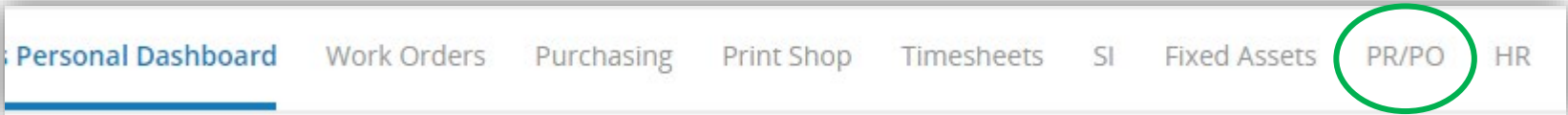
[Forgot your Password?](#)

**Log in**

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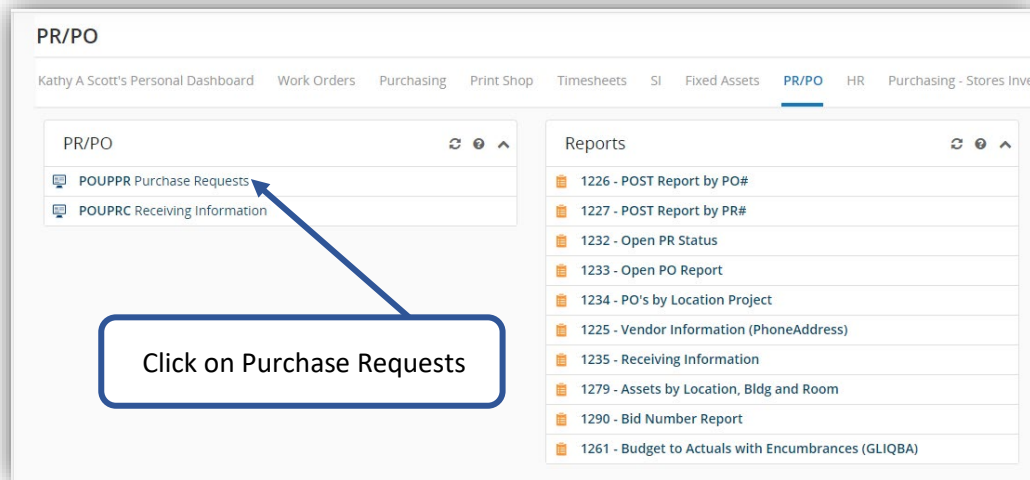
Login using your employee ID and password



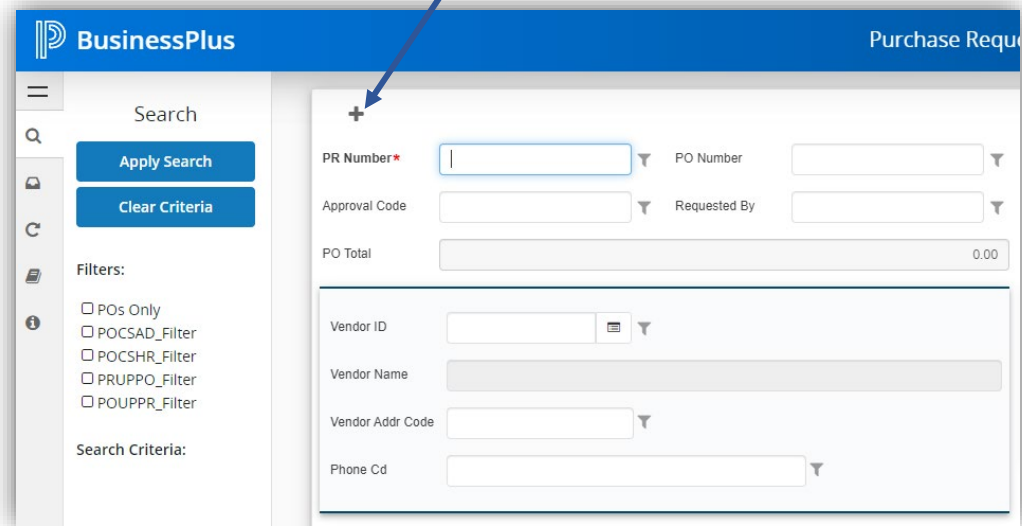
Click on PR/PO

# B+ Purchase Request Guide

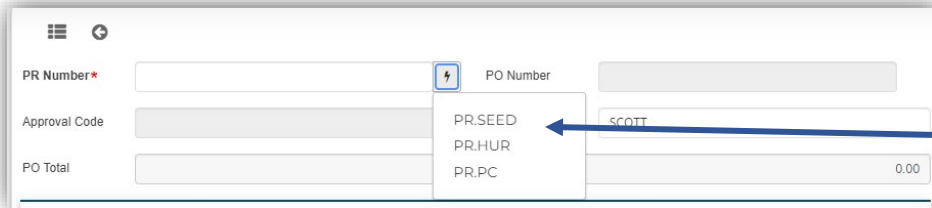
Creating Purchase Requests



Click on the + sign. This will create a new blank purchase request (PR)



## B+ Purchase Request Guide



The screenshot shows the top portion of a Purchase Request form. The 'PR Number\*' field is empty and has a lightning bolt icon at its end. A dropdown menu is open, showing three options: 'PR.SEED', 'PR.HUR', and 'PR.PC'. An arrow points from the 'PR.SEED' option to the text box on the right. Other fields include 'Approval Code', 'PO Number', and 'PO Total' (0.00).

Click on the lightning bolt at the end of the PR Number field and choose the correct seed.

PR.SEED - For normal PR

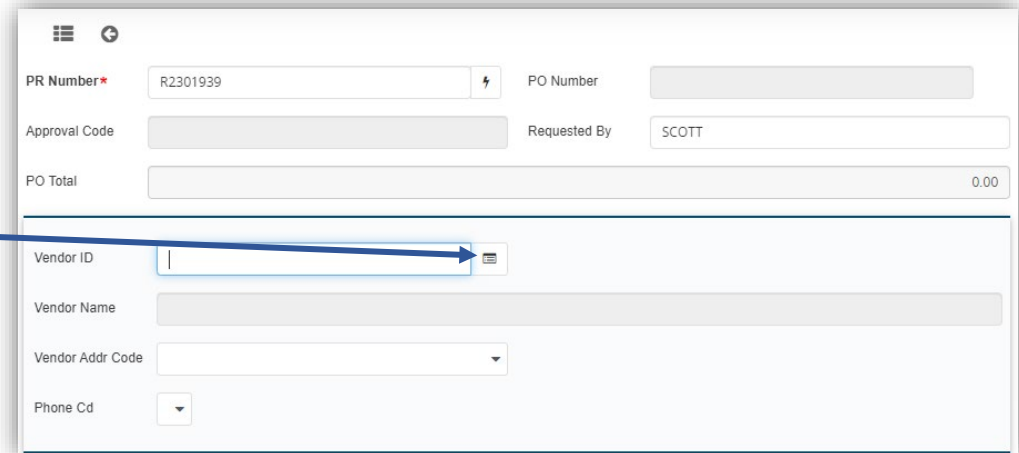
PR.HUR - For hurricane PR

PR.PC – for PR that accompanies P-Card purchases that utilize Federal funds or for asset or non-asset items that must be tagged.

*Toward the end of the school year there will be a line for next year's PRs labeled PR.(the fiscal year number). For 2023-24 it will be PR.24*

Use the drop down box at the end of the Vendor ID field to look up the vendor information.

If this is a new vendor or existing vendor with a new address/email, enter TBA in the vendor field and input the vendor's information in the notes screen and skip the lookup.



The screenshot shows the bottom portion of the Purchase Request form. The 'PR Number\*' field contains 'R2301939'. The 'Requested By' field contains 'SCOTT'. The 'Vendor ID' field is empty and has a dropdown icon at its end. Other fields include 'Approval Code', 'Vendor Name', 'Vendor Addr Code', and 'Phone Cd'.

# B+ Purchase Request Guide

Data Lookup

Search ID Source: Person/Entity

PE ID	Name	Security/CD	Pedb Code
	apple		
V000371	APPLE ART		P
V000372	APPLE BOOKS		P
V010795	APPLE FOR EDUCATION		P
V000376	APPLE INC		P
V000374	APPLE INC.		P
V000377	APPLE MEDICAL EQUIPMENT		P

1 - 10 of 14 items

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4
P4	12545 RIATA VISTA CIRCLE	M/S 198 1ER		
PR	ATTN: MEGAN COLP	12545 RIATA VISTA CIRCLE		
R1	P O BOX 281877			

1 - 7 of 7 items

Add Close Ok

Type the name of the vendor in the Name field on the vendor lookup screen. Click on the icon at the end of the field to choose your search method. Sometimes the vendor is in there more than once. Click on the vendor in the list to see and verify the address information at the bottom of the screen then click OK. DO NOT select an address line with a Code that begins with R.

# B+ Purchase Request Guide

Details

Confirm

Bid Number

End Use

Discount Terms

Requisition Codes

Enter a Bid # using the icon at the end of the Bid Number field.  
**\*It is important to use bid numbers even if the PR is an open PR or a confirming order.**

Search for bid numbers by typing part of the bid # or short description in the fields using ALL CAPS.  
Double click on the bid #.

Bid Number Lookup

Bid Number

Short Desc

apple

Bid Number	Short Desc
APPLE ED \$	APPLE

Is equal to  
Is not equal to  
**Starts with**  
Contains  
Ends with  
Is null  
Is not null

1 - 1 of 1 items

Close Ok

# B+ Purchase Request Guide

**Details**

Confirm  Vnd Account

Bid Number  Contract Number

End Use  Buyer

Discount Terms  PO Type

**Requisition Codes**

Req Code 1  DO NOT EMAIL OR FAX

Req Code 3

Req Code 5

Req Code 7

Req Code 9

Dates

Required Dt

Delivery Dt

Req Code 2

Req Code 4

Req Code 6

Req Code 8

Req Code 10

Entry Dt

The End Use field is a good place to put the name of the person who requested the order or any other notes for yourself.

Enter all req codes that apply to the order by clicking on the down arrow.

**EV, DM, or FX** should be in Req Code 1 box on *every* order. These are referred to as the “Driver” and tell us what you want to happen to the PO after it is printed. Please verify the vendor has a correct email or fax number by looking them up in the 1225-Vendor Information report found under Reports on the PR/PO screen. If the information is not correct, use TBA for the vendor and add the new/ corrected information to the notes.

Code	Description
DA	Document Attached
DB	REQUIRES DAVIS BACON
DC	Academy Construction
DM	DO NOT EMAIL OR FAX
DP	Direct Purchase Order
ED	FS1006.38
EE	EES Construction

**Reports**

- 1226 - POST Report by PO#
- 1227 - POST Report by PR#
- 1232 - Open PR Status
- 1233 - Open PO Report
- 1234 - PO's by Location Project
- 1225 - Vendor Information (PhoneAddress)**
- 1235 - Receiving Information
- 1261 - Budget to Actuals with Encumbrances (GLIQBA)
- 1279 - Assets by Location, Bldg and Room
- 1290 - Bid Number Report

**Ship To ID**

PURCHASING DEPARTMENT

Ship To Addr Code

1016 EDUCATION AVENUE  
PUNTA GORDA, FL 33950

Phone Cd

Other Information

Approved By

**Data Lookup**

PE ID	Name	Sec
WHSE		
WHSE	CHARLOTTE COUNTY PUBLIC SCHOOLS	

The Ship To address will default to your location. To change it, use the icon at the end of the field and search for the location you want the items delivered to by typing the 4-digit location # or WHSE in the PE ID field on the search screen. All asset and non-asset items should be delivered to the district warehouse (WHSE).

# B+ Purchase Request Guide

The screenshot shows a web-based purchase request form. At the top, there are tabs for 'Items' and 'Notes'. Below the tabs is a header area with an 'Add' button on the right. The main form area contains several input fields: 'Item Number' (with value 0002), 'Vendor Item No', 'Product Code', 'Quantity' (with value 1.00), 'Units' (with value EA), 'Unit Price' (with value 569.00000), 'Extended Amt' (with value 569.00), and 'Catalog Number' (with value MPQ83LL/A). Below these fields is a large text area for 'Item Description' containing the text 'IPAD, 10.9-INCH WI-FI 256GB - SILVER'. At the bottom left, there is an 'Account' section with a '+ Add Account' button and a 'Switch to: Amount' button. At the bottom right, there is a 'Total: 100%' and 'Remaining: 0%' indicator, a 'Percent' field with value 100, and a 'Delete' button. A central instruction box with a blue border and rounded corners contains the following text:

Enter your line items using ALL CAPS.

The item number will auto fill  
Enter the Quantity  
Enter the Units (EA, BOX, PK, etc)  
Enter the Unit Price  
The Extended Amount will auto calculate  
Enter the Catalog Number

Enter the Item Description – **always begin a noun**. We need one word that describes what you are buying so anyone can understand what the item is. For example,

CFL, 42W, T4, GX24Q-4 (4-PIN) vs.  
LAMP, CFL, 42W, T4, GX24Q-4 (4-PIN)

## B+ Purchase Request Guide

Item Description

IPAD, 10.9-INCH WI-FI 256GB - SILVER

+ Add Account    Switch to: Amount    Total: 100%    Remaining: 0%

Account	Percent
109220000    7700644    ...	100    Delete

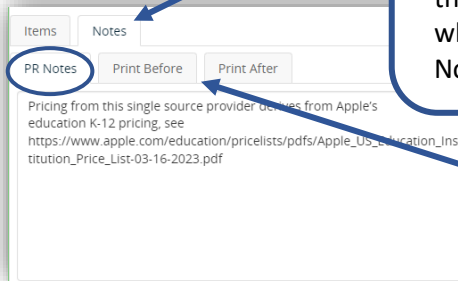
The first ten digits (Org Key) go in the first empty field.  
The last seven digits (Func Obj) go in the second field.

To split the cost of an item between two different accounts, click [+ Add Account](#) then enter second account code. This can be split by percentage or amount. It defaults to amount. To change to percentage, click on Amount next to Switch to:.  
When using split codes, enter the percentage or amount on the right side of the screen for each line of account coding.



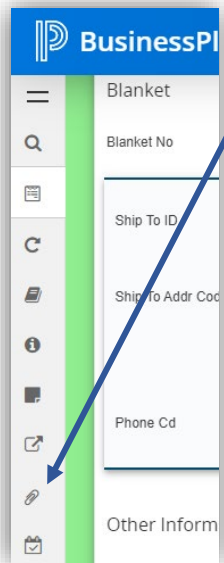
# B+ Purchase Request Guide

## Notes and Attachments



Click on the Notes tab to enter notes about this order. PR Notes are for internal use only. The NT Req code must be used to let users know there are notes entered there. This is also where you enter new vendor information. Nothing on this screen will print on the PO.

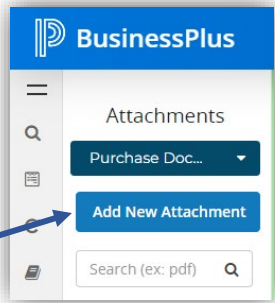
To have comments appear on the face of your PO, click on the Print Before or Print After tab. Notes here will print either before or after the line items on the PO.



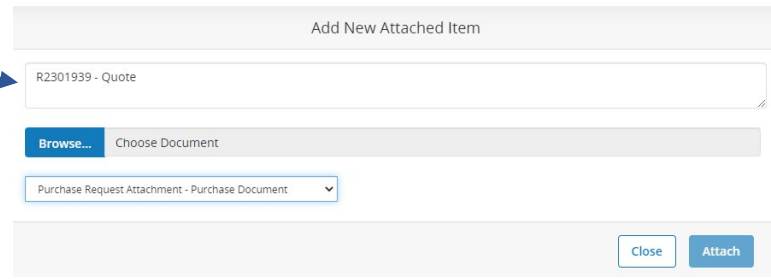
Attach supporting documents by clicking on the paperclip on the left side of the screen.

Click Add New Attachment

In the Description field enter the R# followed by one word to describe the attachment. Click the Browse button, find and select the supporting document. Click Attach and then Close. Make sure you use the DA req. code.



If the attachment is to be sent with the PO, enter NT in the req. codes and add a note to send the attachment with PO. If the note and NT req. code are not added, the attachment will not be sent.



# B+ Purchase Request Guide

## Creating Open/Blanket POs

The screenshot shows a software interface for creating a purchase request. At the top, there are tabs for 'Items' and 'Notes'. Below the tabs is a header area with a hamburger menu icon on the left and an 'Add' button on the right. The main form area contains several input fields: 'Item Number' (with '0001' and a lightning bolt icon), 'Vendor Item No' (disabled), 'Product Code' (with a calendar icon), 'Quantity' (highlighted in yellow, containing '1,350,000.00'), 'Units' (with a dropdown arrow, containing 'EA'), 'Unit Price' (highlighted in yellow, containing '0.01000'), 'Extended Amt' (highlighted in yellow, containing '13,500.00'), and 'Catalog Number'. Below these fields is a section titled 'Item Description' containing the text: 'INSTALLATION SERVICES FOR INTERACTIVE PANELS - APPROXIMATELY 45 HRS @ \$300 PER HR'.

Enter the digits of the dollar amount you would like in the quantity field minus the decimal point. For example, \$200.00 should be entered in the quantity field as 20000

In the Description field enter what the PO is for beginning with a noun and ALL CAPS. If the PO is for use in a store, list the authorized users in the description field.

In the Unit Price field enter .01 (1 cent). This will allow you to receive on the various invoices you get against the PO.

All open/blanket POs need the req. code OP or BP. Do not type the words Open PO or Blanket PO in the description field. That is what the req. code does.

The screenshot shows a dropdown menu titled 'Requisition Codes'. The menu is open, showing several options. The first option is 'BP' with a dropdown arrow, and the text 'BLANKET PURCHASE ORDER' is displayed to its right. Below this are four other options: 'Req Code 3', 'Req Code 5', 'Req Code 7', and 'Req Code 9', each with a dropdown arrow.

# B+ Purchase Request Guide

POs WITH A LARGE QUANTITY OF LINE ITEMS

The screenshot shows a software interface for creating a purchase request. At the top, there are tabs for 'Items' and 'Notes'. Below the tabs is a toolbar with icons for list view, back, forward, add, delete, and copy. The main form area contains several input fields: 'Item Number' (0001), 'Vendor Item No', 'Product Code', 'Quantity' (476,651.00), 'Units', 'Unit Price' (0.01000), 'Extended Amt' (4,766.51), and 'Catalog Number'. Below these fields is the 'Item Description' section, which contains the text: 'BOOK SUBSCRIPTON', 'ORDER# QUO-301-868-V8C5Z0', and 'INCLUDES PROCESSING'. A blue callout box with a rounded border and a blue arrow pointing to the description field contains the text: 'Include a list #, quote #, or reference # in your description.'

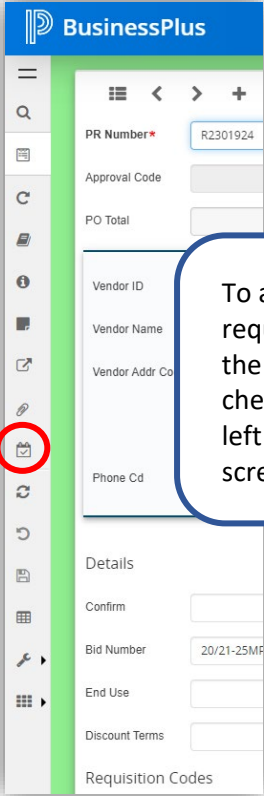
When placing an order that encompasses a large quantity of different items such as books for the media center, enter it similar to an open PO. DO NOT use this method for Federal Fund purchases as those orders must be itemized.

Enter the digits of the dollar amount of the order in the quantity field minus the decimal point. For example, \$200.00 should be entered in the quantity field as 20000, and enter .01 in the Unit Price field. Entering the price this way allows you to receive on items as they come in.

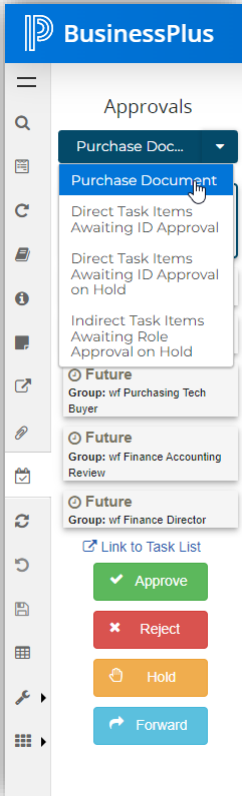
Don't forget to attach a list of the items to the PR. When shopping an online vendor, you can attach a screen print of your shopping cart. Also, include a note to email or fax the attached list with the PO if needed and add NT to the req. codes.

# B+ Purchase Request Guide

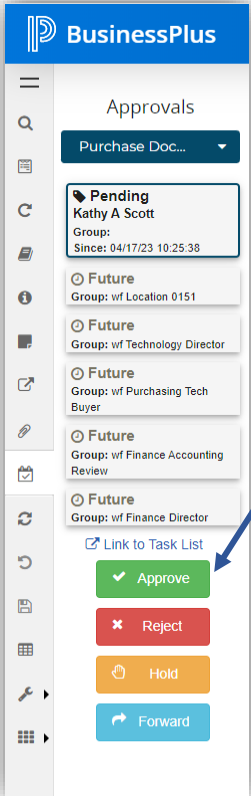
## Submitting/Approving a Purchase Request



To approve the requisition, click on the icon with a checkmark on the left side of the screen.

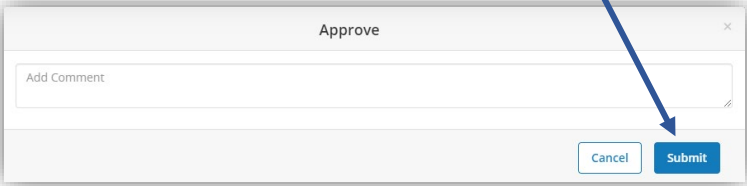


Select Purchase Document from the drop down.



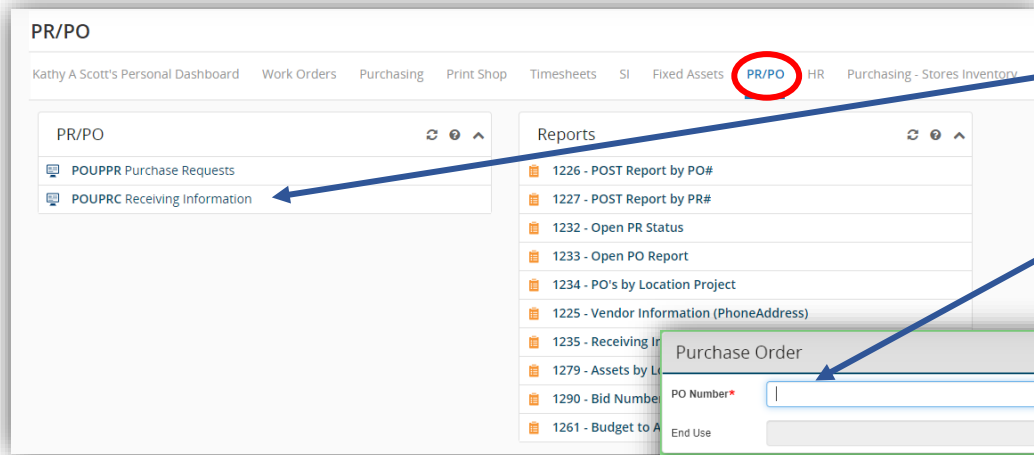
Your name will appear in the first box. All approvers are listed in the order of their approval below your name. This is the workflow for this PR.

If you have reviewed the PR and everything is the way you want it, all req. codes selected, any attachments attached, etc., click Approve then Submit.



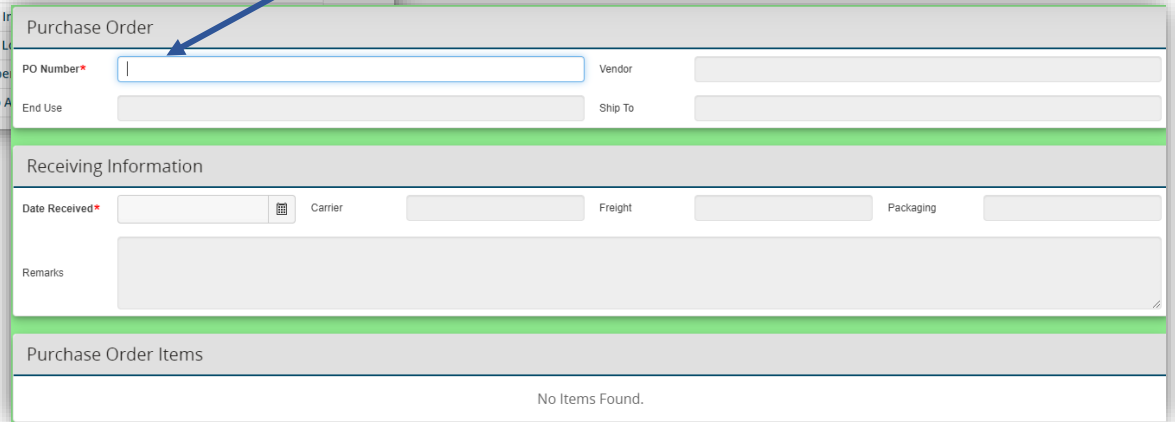
# B+ Purchase Request Guide

PO Receiving



On the PR/PO screen select Receiving Information.

Enter your PO number in the PO Number field on the pop-up box and press tab.



# B+ Purchase Request Guide

Purchase Order

PO Number\* p2301457 Vendor DEX IMAGING

End Use Ship To 9039

Receiving Information

Date Received\* 04/17/2023

Remarks

Purchase Order Items

PO Item: 0001 PRINTER, HP E50145DN PRINTER - Quantity to Receive: 0 Quantity to Reject: 0 Amount to Receive: 0

PR # R2301928 PR Item 0001 Notes Units EA Manual Fully Receive

Received To Date 0

Serial #

Tag

Product

Requested By MESS

Receiving Information - Item No: 0001

Quantity Accepted 3 Quantity Rejected

Amount Accepted Warehouse

Complete

Done

Make sure the date in the Date Received field is the date the items were received. If it is not, change it.

To receive some items, but not all, on the PO, select Manual. Enter the quantity received in the pop-up screen and click Done. Click Save Changes on the left side of the screen. The Received to Date will reflect the changes.

To receive on all items, select Fully Receive and Click Save Changes on the left side of the screen. Refresh your screen to update the Received to Date field.

## Notes:

Finance will not pay on items that have not been received.

If you place a minus (-) sign before a quantity and Save Changes, you are unreceiving the item.

The Remarks box under Receiving Information can be used to give a message to Finance when you receive or unreceive on orders.

BusinessPlus

Menu X

Clear Form

Screen Links

Revert Changes

Save Changes

Receive All

Unreceive All

# B+ Purchase Request Guide

## Searching for PRs/POs

The screenshot displays a web form for searching Purchase Requests (PRs) and Purchase Orders (POs). At the top left, there is a plus sign (+) icon. The form is organized into several sections:


- Search Fields:** PR Number\* (highlighted with a blue border), PO Number, Status\*, Security Code, Approval Code, Requested By, Date Requested (with a calendar icon), PO Total (0.00), and PR Total (0.00).
- Vendor Information:** Vendor ID, Vendor Name, Vendor Addr Code, and Phone Cd.
- Remit To Information:** Remit To ID, Remit To Addr Code, and Phone Cd.
- Details Section:** Confirm, Bid Number, End Use, Discount Terms, Vend Account, Contract Number, Buyer, and PO Type\*.

When the Purchase Request screen is opened, it is in search mode until the plus (+) is selected to enter a new PR. To search for a PR/PO, enter the R or P number and press Enter. You can also enter part of the number with a percent (%) sign at the end. The % is the wildcard. All orders containing that information will be shown.

You can also search by vendor, bid number, and other fields in the same way.

# B+ Purchase Request Guide

Searches will display as shown here. To see the details of a line, click the pencil at the left of the screen and it will open that record.

The records can be toggled between list view and detail view by clicking  in the upper left corner.

	PR Number	PO Number	Vendor ID	
	R2301931	P2301462	V015139	APG ELECTRIC II
	R2301930	P2301461	V015139	APG ELECTRIC II
	R2301928	P2301457	V014566	DEX IMAGING
	R2301929	P2301460	V014566	DEX IMAGING
	R2301926	P2301456	V000374	APPLE INC.
	R2301927	P2301459	V000374	APPLE INC.
	R2301925	P2301458	V000374	APPLE INC.
	R2301899	P2301453	V002455	GULF ICE SYSTEMS INC
	R2301911	P2301454	V014912	RELADYNE FLORIDA LLC
	R2301888	P2301455	V014566	
	R2301886	P2301451	V008033	

To set up headings on your search screen and others that display in grid or list form, click on the down arrow next to the box with a checkmark in it. A list of possible headings will display. Select the heading(s) you want to display on your list and select Close.

Until you select your headings, all lines will be blank and will not show any information about the record(s).

- Select All
- Approval Code (AprCd)
- Approved By (AprvBy)
- Bid Number (BidNo)
- Bill To Addr Code (BillAddrCd)
- Bill To ID (BillId)
- Blanket Amt (BlanketAmt)
- Blanket No (BlanketNo)
- Buyer (Buyer)
- Category Code (Category)
- Confirm (Confirm)
- Contract Number (Contract)
- Currency (Currency)
- Date Approved (AppvDt)

Restore
Close



# B+ Purchase Request Guide

## Deleting PRs and Line Items

To delete an entire PR, bring up the PR you want to delete. Click on the trash can above the PR Number field.

A pop-up box will open asking you to confirm that you want to delete the current record. Select Yes to delete and No to cancel the deletion.

The screenshot shows the 'Purchase Request' details form. At the top, there are navigation icons: a list icon, left and right arrows, a plus sign, and a trash can icon which is circled in red. Below these are fields for 'PR Number\*' (R2301939), 'Approval Code', 'PO Number', 'Requested By' (SCOTT), and 'PO Total' (0.00). The 'Vendor' section includes 'Vendor ID' (V000374), 'Vendor Name' (APPLE INC.), 'Vendor Addr Code', and address details: 'ATTN: MEGAN CULP', '12545 RIATA VISTA CIRCLE', 'AUSTIN, TX 78727'. The 'Phone Cd' is 'FX' and the number is '8005900325-FX'. A 'Details' section at the bottom has a 'Confirm' field and a 'Bid Number' (APPLE ED \$ PRINCIPAL).

The 'Confirm Delete?' pop-up box contains the text: 'Are you sure you want to delete the current record?'. At the bottom right, there are two buttons: 'No' and 'Yes'.

The screenshot shows the 'Items' tab of the PR. It features a table with columns for 'Item Number', 'Vendor Item No', 'Units', and 'Unit Price'. The first row shows 'Item Number' 0001, 'Units' EA, and 'Item Description' 'IPAD 10.9-INCH WI-FI 64GB - SILVER'. Above the table, there are navigation icons: a list icon, left and right arrows, a plus sign, a trash can icon circled in red, and a copy icon.

To delete a single line item from a PR, bring up the Item Number you want to delete. Click on the trash can above the Item Number field and select Yes on the Confirm Delete? pop-up box to delete that Item. All other items will remain. The Item Numbers will not change after lines are deleted.