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## PURCHASING PROCESS GUIDELINES

### KEY POINTS

1. Purchases are not approved unless you have received a Purchase Order (“PO”).
2. Submit requisitions at least 7-10 days in advance to allow time for approval.
3. Requisitions submitted after an item has been purchased will be denied; the purchasing process must be followed.
4. Paper requisitions are no longer accepted by the business office.
5. Personal reimbursements are only allowed with prior approval. The Superintendent must approve any personal reimbursement requests.
6. Clerical staff should be checking for new requisitions to approve daily. Clerical staff should proof the requisition to make sure it is completed correctly and that all information is filled in.
7. **NEW** - You will receive an email with a copy of the PO once your order has been placed or you are approved to place your order/go shopping\*.
8. **NEW** - Once you have received all of the items on your PO, email it to the [order@swmetro.k12.mn.us](mailto:order@swmetro.k12.mn.us) email and let us know that you have received your order.
9. When using Web Express to place an order, please try to purchase as many of the needed items from the same vendor when possible.
10. Try to consolidate your ordering whenever possible (weekly, monthly).
11. All food purchases must be compliant with the USDA’s Food Guidelines and our [District Wellness Policy #533](#).
12. Any staff member who is requesting to go shopping\* at a store must have pre-approval from the Business Office and be added to the approved purchaser list at the store (added to the list by the Business Office).

**PROCESS FOR PLACING AN ORDER**

Log into SMARTer (make sure to submit your order a minimum of 7-10 days in advance)

**Shop by Vendor Catalog:**

- 1) Go to “Requests” > “Ordering” > “Shop”
- 2) Choose a vendor and shop their site (try to get as many items from one vendor as possible)
- 3) Add items to your cart
- 4) “Checkout”
- 5) Check Mark all items you would like to order, Click “Begin Transfer”
- 6) Put your first and last name in the “Comments” box (do not put anything else in this box)
- 7) Choose your ship to location
- 8) Add any notes in the “Vendor Notes” box (this note will show up in bold letters at the bottom of the PO)
- 9) In the “Buyer” box choose the program you are purchasing for
- 10) Add your program code in the “Account Code” box
- 11) Click “Transfer”
- 12) Make any edits at this point
- 13) Upload any attachments to the “Add/Maintain Notes” box
- 14) Once complete, click “Save”
- 15) Click “Route” to submit your order

**Manually Enter Items:**

- 1) Go to “Requests” > “Order Requisition Entry”
- 2) Put your first and last name in the “Comments” box (it's very important not to put anything else in this box)
- 3) Choose your “Ship To” location
- 4) Add any notes in the “Vendor Notes” box
- 5) In the “Buyer” box, choose the program you are purchasing for
- 6) Click “Save and Enter Items”
- 7) Manually enter each item. Make sure to include: Item number, detailed description, Quantity, Rate, and Code
- 8) In the “Comments” box make sure to include: what event the items are for, the date of event, Amazon wish list link or website link, or if needed to pay by check
- 9) Upload any attachments/quotes to “Add/Maintain Notes”
- 10) Make sure to click “Add/Save Row” to save the lines you have entered
- 11) Click “Save” once finished
- 12) Click “Route” to submit your order

## Order Requisition Entry

**Current Requisitions** | **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.  
Fields with a colored background need to be entered before saving.

Status: Pending ▼

Date Required: 03/06/2019

Comments: Attn: Jacqueline Johnson

Vendor Code: 4 IMPRINT -1002 ▼

Alt Address: ▼

PO Category: ▼

Req#: 1557

Created By: Jacqueline L. Johnson - 3959

Ship to Location: BUS - SOUTHWEST METRO INTERMEDIATE - DIST ▼

Vendor Notes:

Buyer: BUS - Business Office ▼

Vendor Name: 4 IMPRINT  
101 COMMERCE ST  
OSHKOSH, WI 54901

Vendor Fax#: 866-508-8664

**New Row to be Added**

SKU Code	Item # AND Description	Units	U.Type	Rate	Discount	Total Cost	Type	Account Code	GL Period
M ▼	Miscellaneous	1.00	EA ▼	0.00	0.00 %	0.00	E ▼		201909
Ship to Location				Change Reason		Comments: Add wish list links and other comments here			
BUS - SOUTHWEST METRO INTERMEDIATE - DISTRICT OFFICE ▼									

\*Reminder to add shipping, handling or promotional amounts

## REQUESTING A NEW VENDOR

Steps to requesting a new vendor be added to the SMARTeR system:

- 1) Obtain a W9 from the vendor.
- 2) Contact the business office by emailing [order@swmetro.k12.mn.us](mailto:order@swmetro.k12.mn.us) to request the approval of a new vendor.
- 3) Once the vendor has been approved or denied the business office will contact you to let you know that you can or can not submit your requisition.

## CHECKING THE STATUS OF AN ORDER

Steps to Checking the status of an order:

- 1) Please allow 7-10 days for your order to be fully approved and processed.
- 2) Log into SMARTeR
- 3) Go to "Order Requisition Entry" and look up your requisition ("req") number
- 4) Go to "Reports" > "Approval Audit-Ordering Reqs"
- 5) Type your Req # in the "Req No(s)" box and click "Run Report". This will give you a report of the approval status.

- 6) If your order is not approved you may follow up with the person with whom your order is pending approval.
- 7) If you still have questions please start by following up with the clerical staff member located in your building.
- 8) If there are still questions regarding the status of an order, you can email the [order@swmetro.k12.mn.us](mailto:order@swmetro.k12.mn.us) email for an update. Make sure to reference your req #.

Once your order has been placed:

- You will receive an automatic email once the business office has printed your order. (This does not always mean that your order has been placed.)
- You will receive an email with a copy of the PO once your order has been placed or once you are approved to place your order/go shopping\*.
- Once you have received all of the items on your PO, email it to the [order@swmetro.k12.mn.us](mailto:order@swmetro.k12.mn.us) email and let us know that you have received your order.
- If you only received part of your order or did not receive your order at all:
  - Allow 7-10 days for your order to arrive and then email the [order@swmetro.k12.mn.us](mailto:order@swmetro.k12.mn.us) email and let the business office know that you are missing items. Make sure to reference the PO # when contacting the business office.

**\* Staff members who are authorized to go shopping:**

Once you have purchased the approved items on the PO, please send the original receipt attached to the printed PO to the Business Office c/o Diane Chromy.