

## PURCHASING GUIDELINES – FOR PURCHASE ORDER PROCESSING

- ◆ If purchase requisitions in BiTech arrive at Purchasing with incorrect budget numbers or object codes, they will be returned to sites electronically. Please pay special attention to fixed asset purchase requisitions. **Purchasing will send an e-mail to inform you of the return of your purchase requisition and the reason it is being returned.**
- ◆ If conference attendance request forms are received and there is no money in the budget, they will be returned to the originator. Reviewing the Web Inquiry system can usually eliminate this problem. The budget shown is real time, and users can quickly tell if there are funds available **BEFORE** submitting the request.
- ◆ Out-of-state conferences have to be Board approved (Board Policy 4133) **BEFORE** Purchasing can process the purchase order.
- ◆ Please remember to send back-up paperwork (County requirement for the payment process) to Purchasing for purchase requisitions in the system. Examples are memberships (i.e.: renewal forms), maintenance agreement renewals, etc. **AND** field trips, such as Long Beach Aquarium, Camp High Trails, Ocean Institute, to name a few.
- ◆ Don't use vendor numbers that begin with the letter "**C**". These vendor numbers are for use by Accounts Receivable staff only.
- ◆ If you input purchase requisitions for reimbursements for your principal or anyone else on a regular basis, please input only one purchase requisition per month per person. Purchasing occasionally receives several purchase requisitions prepared on a single day for one person. You may combine the reimbursements even if you are using various budget numbers by using the Account Distribution screen.
- ◆ If the products ordered by Purchase Order don't arrive within a reasonable amount of time, please contact the Purchasing Department to follow-up with the vendor. *Users should not contact vendors directly.*
- ◆ If you are having trouble utilizing PELU to find an address for a vendor, let Bette or Ron know. We will try to walk you through the process over the telephone. REMEMBER: **One vendor name can have up to 26 different addresses.**

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