

Purchasing Reminders 2022-2023

Procedures for Requisition Entry

1. Check for Contract information from the drop down box, and select if applicable. (This is found at the bottom of the page after you have picked the vendor name and ship to)
2. Requisitions without this information will be **denied**.
3. Please tell us on the body of the PO what we need to do with it i.e. return PO, fax PO, etc.
4. Registration & membership POs will be returned to the campus/department for processing.
5. Don't forget to enter the Incident IQ ticket # if you are ordering technology items & change the ship to, to Technology.
6. The description field on the 1st screen does not show up on the PO, it shows up on the check stub when paid.
7. Add enough info so the vendor knows what you are ordering, i.e. item#, quantity, quote#, trip# etc. Do not rely on see attached as some POs are emailed directly from Skyward.

Retail Receipts

1. Costco & Home Depot Pro are our retail vendors. In order to use these vendors you need to create a Blanket Purchase Order. For Home Depot Pro take Pro Credit Card & approved PO to make the purchase. For Costco take an approved PO to Costco & ask for a manager, they will help you from there. **All retail vendor blanket POs can only be used once.** When you return to campus/department **receive the dollar amount in Skyward immediately and send the receipt to accounts payable with the PO# on the receipt.**
2. Receipts are sent to Accounts Payable for payment (Jackie Adamson & Irene Perez).

3. No gift cards are to be purchased.

Xerox

1. Xerox will send your supplies to you thanks to the papercut software. With the supply shortages from covid you may want to call in & ask for toner before school starts. If you are going to do a lot of printing, please call Xerox and let them know that so they can send extra supplies. The # for Xerox is on your machine (469-702-4054). Always have extra supplies on hand at the campus.
2. **Xerox will charge a fee for the move if you need it moved in a certain time frame. Xerox machines cannot be moved without completing a form in Incident IQ.** The move will then be routed through an approval path. Tech or Purchasing will notify you of any and all expenses involved with the move. Incident IQ/new ticket/facilities/warehouse services/Xerox copier

Incident IQ Ticket Requests

1. Login to Incident IQ / click new ticket / click facilities / click warehouse services / pick the service you need.
2. Please make sure to put a ticket in for all requests for the warehouse. Do not email Montrell your requests directly. This includes pickup of recycle bins, pickup of surplus items, table and chair requests, requests for furniture, etc.
3. Do not put in request for tables and chairs prior to 90 days; however, do not wait until last minute either. **Event tickets must be put in 2 weeks before the event.** Tables and chairs are on first come first serve basis. Remember this during holidays, award times and end of year. **We will limit some items during busy times of the year in order to ensure all campus needs are met to the best of our ability.**

4. Table and chair requests need to be submitted under Warehouse Services **(EVENTS)** not "pickup and delivery." All returned dates submitted need to have equipment ready to be picked up on that date & in the same place it was dropped off.
5. Please be sure to cancel the request if you cancel your event & let us know you have canceled it.
6. **Remember the Warehouse delivers and picks up the equipment. The custodians set up the equipment. If additional help is needed for set-up & take-down, do an Incident IQ ticket under facilities/maintenance/custodial.**
7. If we do not have the equipment you need at the time you need it you will be referred to At Once Party Rental, Rental Stop or Big D Party & Event Rental.
8. The equipment is to be used for the event that you did the request for only. **No you cannot keep the equipment** because you are having another event that you did not request equipment for; that equipment has been scheduled for someone else. **ALL equipment needs to be ready for pick-up at the time & date that you put on the event ticket.**

Mail

1. Please put your **organization number on the top of your envelopes** so we correctly apply postage.
2. Make sure to add a return address. If the mail is unable to be delivered and the envelope has no return address, you will never be able to know if the address you have is incorrect.
3. Make sure to complete all information on the interoffice envelope when sending interschool mail. There need to be names and building locations, remember a lot of people have moved to TLC, on the envelope not from 3rd grade to 4th grade or from Sue to John.

4. **Please empty out your interoffice pouches daily.** When we pick up the same mail we delivered, it gets confusing and delays you getting the proper daily mail.
5. When sending large quantities of mail please fold/close each envelope and stack them one on top of each other....do not fold the flap over the next envelope.

Shred bins

1. These are to be placed in your teacher work room, not by the cafeteria or restrooms.
2. The shred bins are to be used for paperwork that has confidential information on it related to the District, not unwanted copies of something, not personal bank statements, not credit card statements, not trash or other like items.
3. Shred bins are **NOT** to be altered in any way; if they are, the campus/department will be paying for the replacement of the shred bin.
4. If you do not have a key to the shred bin and need it unlocked please call Montrell Edwards (2293).

New Vendors

1. **Must attach vendor application and w-9 to a new vendor request in Skyward.** There will also be a form that must be filled out by the person wanting to add the new vendor. New vendors must be tied to a co-op for us to add them. **ALL forms must be attached to the new vendor request in Skyward** in order for purchasing to approve the vendor add. When in doubt call Purchasing.

Business Cards

1. **1st do a PO to Southwest Printing.** In the description of the PO you need to have the name of the person you are ordering cards for.
2. Cost is \$25/box of 500

3. Once PO is approved, a Business Order Form will need to be submitted to Purchasing. Go to DISD website to access the form. Click the "Departments" link/"Purchasing"/"Purchasing Forms & Documents". Click the "Business Card Order Form" Link. Complete the PDF Form/File Print to PDF/Save File with Full Name and email to Julie Karonka at jkaronka@duncanvilleisd.org Proof of Business cards will sent to requestor for approval.

Printing Vendors

1. See hand out on purchasing webpage for printing vendors. These are the only printing vendors we are to use. Our vendor for envelopes & business cards is SW Printing.

Purchase Orders

1. ****Must be done line by line, with an item #, item description, quantity and cost per item; not office supplies with a list attached.****
2. We have provided you with a list of e-commerce vendors in the handbook.
3. You must tell us what to do with the PO or it just gets filed away.
4. If you tell us to fax the PO and there is no fax # we will send the PO to you to fax or email to the vendor.
5. Blanket POs are for retail purchases or to have a vendor on stand by for emergency repairs. All retail blanket POs are a **onetime** use only.
6. When ordering for multiple campuses/departments place the orders by each campus/department and have it delivered to that campus/department. **Do NOT do one order** & have it sent to the warehouse to be sorted & delivered to different locations. **Orders will not be delivered to one place, sorted, and then re-delivered to another place.**
7. Library books need to be sent to the campus they are being ordered for not the warehouse.
8. When ordering items for multiple campuses that do not need to be sorted

please state on the PO or attach a list in Skyward to the PO of how many items go to each campus. (For example flat carts were ordered for all campuses. A list of how many go to each campus was attached.)

Furniture

1. ALL (office, classroom, library, etc.) furniture orders **must** go through Julie Karonka in Purchasing. We have certain vendors that are used in order to create consistency throughout the district.