

SMARTe Training Tip #1 – Editing the Account Strings on a Purchase Requisition

If you want to change the account string on a purchase req, use the SEARCH feature to select the new string. Or... if you want to just type in the new account string, you have to erase the Pseudo number. Otherwise when you save the changed Requisition, it will revert back to the Account String associated with the Pseudo number. If you have any trouble editing a Purchase Req, please just give your friendly accountant here in fiscal a call 😊.

Lisa Loop

The screenshot displays the SMARTe purchasing system interface. At the top, the browser address bar shows the URL: <https://smarte.mtview.k12.ca.us/purchasing/frmPurchReq.aspx>. The page header includes the user name 'User: Loop,Lisa', the fiscal year 'Fiscal Year: 2017', and the district 'District: Mountain View School District'. Below the header is a navigation menu with options like 'File', 'General Ledger', 'Purchasing / AP', 'Warehouse', 'Work Order', 'Reports/Query', and 'Admin'. The main section is titled 'Purchase Requisition' and contains several buttons: 'New', 'Edit', 'Save', 'Cancel', 'Search', 'Copy Req', 'Templates', 'History', 'Xactions', 'Notes(0)', 'Print', 'Attachments(0)', and 'Notify'. An 'Action:' dropdown menu is set to 'Send to Purchasing - Forward'. Below this, there are fields for 'Requisition #' (R17-00084), 'Purchase Order #' (Not Assigned), and 'Current Step: Purchasing - Final Step'. A 'Vendor #' field is set to 04476. The 'Requested By:' field is Karina Magdaleno, and the 'Requested For:' is PERSONNEL SERVICES. The 'Deliver Site:' is Personnel Services. The 'Date Needed:' is 07/19/2016, and the 'Blanket:' is No. The 'Req. State:' is - None -. There is an 'Auto Distribute by Percent:' field set to Yes and a 'ReCalculate' button. Below the form is a table with two sections: 'Accounts' and 'Items'. The 'Accounts' table has columns: Line, Pseudo, Account Number, Percent, Amount, and PreEncumbrance. The 'Items' table has columns: Line #, Description, Unit Issue, Qty, Unit Cost, Taxable, Ship Amt, SubTotal, and Delete. Red arrows point from labels 'Account String' and 'Pseudo Number' to the 'Account Number' and 'Pseudo' fields in the 'Accounts' table, respectively.

Line	Pseudo	Account Number	Percent	Amount	PreEncumbrance
1	430340	010-00000-0-00000-74000-4350-0004370	100.00	141.19	141.19

Line #	Description	Unit Issue	Qty	Unit Cost	Taxable	Ship Amt	SubTotal	Delete
1	366327, DEFLECT-O CHAIR MAT FOR LOW-PILE CARPETS, FOR COMMERCIAL-GRADE	EACH	1	68.99	Yes	0.00	68.99	
2	830734, REALSPACE BLACK VINYL CHAIR MAT FOR LOW-PILE CARPETS, STUDDED,	EACH	1	39.99	Yes	0.00	39.99	
3	369581, POST-IT FLAGS, 3/8" x 1 7/10", ASSORTED BRIGHT COLORS, 35 FLAGS	EACH	4	4.99	Yes	0.00	19.95	

Comments:

Subtotal: 128.94
Shipping Total: 0.00