K-PURCHASE INSTRUCTIONS

Grinnell-Newburg CSD has partnered with Kivetta Software to manage our district's requisition/PO process. This means that all purchase requests are to be submitted through an online system called k-Purchase™.

Getting started: Click HERE to set up your k-Purchase password for the first time.
1) Enter your email address

2) Enter a new password and re-enter it to confirm the password. (NOTE: the password must be at least seven characters, and at least one special character such as !, %, or $ is required to strengthen your password.
3) Click "Reset Password" and you will be taken to the k-Purchase login page.

You can create a PO in the following ways:
1) k-Marketplace – search the k-Marketplace from the Home page for needed items. After adding all items into the shopping cart, click the "Shopping Complete" button and then "Open Request." From there, the remaining fields in the purchase request can be populated and then submitted for approval.
2) Queue Tab – click on the Queue tab at the top of the page. Once on this page, click "New Request". Purchase request should then be filed out and submitted for approval.
3) Quick Links – Under the "Quick Links" section on the Home page, click "Create New Request." Purchase request should then be filled out and submitted for approval.

Then . . .
1. Fill in the blanks under the "Summary" tab. The "Request Title" describes the items ordered and is what will show in the queue, so make it meaningful to you. Click "Continue to Items".

2.   Under the "Items" tab, click the "+Add" box on the left.   In the "Add New Item" window, you must complete the fields that have an asterisk. The rest of the fields are optional. However, you will have an opportunity later to have this P.O. sent directly to the vendor, so if you think you will choose that option, be sure to complete Product # Type and any other relevant information. Click "Save". NOTE IF YOU ARE ORDERING MORE THAN ONE ITEM: kPurchase will later return you to the "Items" tab (see #5 below), at which point you will repeat this step.

3.   In the "Add Allocated Account" window, choose the appropriate account from the drop down box, then click "Save". NOTE: The % of Total column is there because the cost of items can be split between accounts. To do that, fill in the appropriate Allocated Cost for that account, click "Save", then click the "+Add" box to add another account.

4.   In the "Item Summary" window, simply verify that the info is correct, then click "Close".

5.   You will be returned to the "Items" tab. If you ordering multiple items, repeat Step 2 for each item. kPurchase assumes you will use the same account for the entire order. If you

are not, you can click the wrench symbol on the Items tab and in the Items Summary window to change the allocated account. Scroll down and click "Continue to Vendor/Payment Type".

6.　　　Under the "Vendor/Payment" tab, type the name of the vendor or choose from the drop down box. If you want to verify the information about the vendor, click the little "i" in the drop down box. If the vendor is not already listed as an option, click the little "+" and you will be directed to contact district office to add all needed info about that vendor. Leave "Payment Method" and the check box alone, add P.O. special instructions if you have any and delivery terms if needed. Leave the "P.O. Bill To" address as is, but change the "P.O. Ship To" to Grinnell High School Shipping. Put your name in the "Ship To Attention" box.

7.　　　*The P.O. can automatically be delivered to the vendor via email or fax. If that info has been provided, simply check "Automatically send P.O. to vendor" under "P.O. Delivery". If it hasn't been provided, you can add it by clicking the little "+" after "Email (or Fax) Purchase Order to Vendor". This is a great option if the P.O. is actually an order.*

　　　If you prefer to place the order via phone or otherwise, check "I will send P.O to vendor" and proceed to place the order yourself.

　　　If this P.O. is a reimbursement to you, you will be the vendor and will select "I will send P.O to vendor", though you won't actually need to send anything. Scroll down and click "Continue to Review/Submit".

8.　　　Under the "Review/Submit" tab, verify accuracy. All tabs have a "Back to…" box on the bottom left. If you need to make changes, click those boxes. Click "Submit Request".

9.　　　The P.O. will then be automatically sent for approval. In the queue, the status will say "Pending Approval". After it's been approved, the status will say "Pending Receive". Once you have received the items and the bill is okay to pay, you must return to kPurchase and mark your P.O. as received.   In the queue, click the title, then the "Open Request" button. Under the "Receive" tab, click the "Go" button in the "Qty Received" box. Next click "Continue", then "Receive Complete".

　　　In the future, go to **http://kpurchase.kivetta.com/account/login.aspx** to create a P.O.