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TO REQUEST A PRICE CHECK OF A REQUISITION ITEM 1

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INTRODUCTION

When adding items to a requisition, a person can ask a purchaser about the price of an item so they know, for example, whether or not they have the funds available or if they might exceed a spending limit. On the **Requisitions** screen, a user who is a requester, authorizer, or fiscal coder can request a price check from a purchaser.

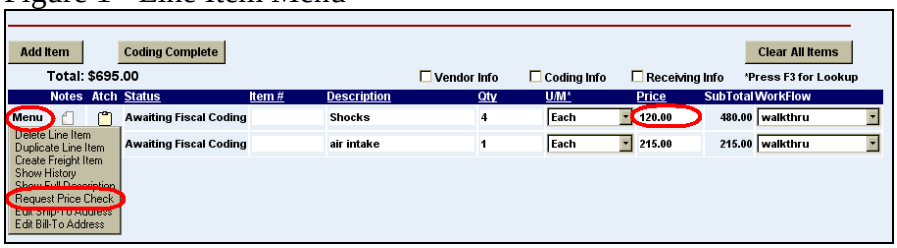
TO REQUEST A PRICE CHECK OF A REQUISITION ITEM

The requisition must be saved with line items added (a price must be entered on each line item). This will enable the full line item Menu.

<u>Requester/Authorizer/Fiscal Coder:</u>

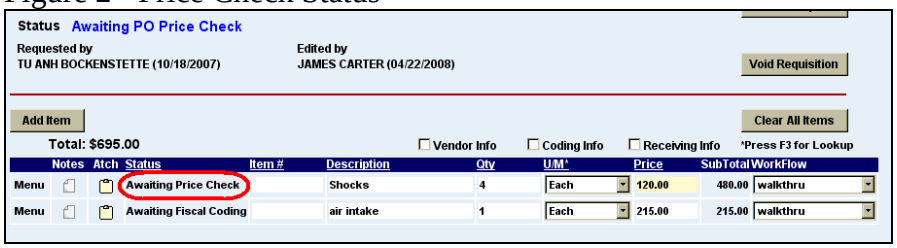
1. Click **Menu** next to the line item.
2. Click **Price Check**.

Figure 1 - Line Item Menu



3. The **Status** will change to **Awaiting Price Check**.

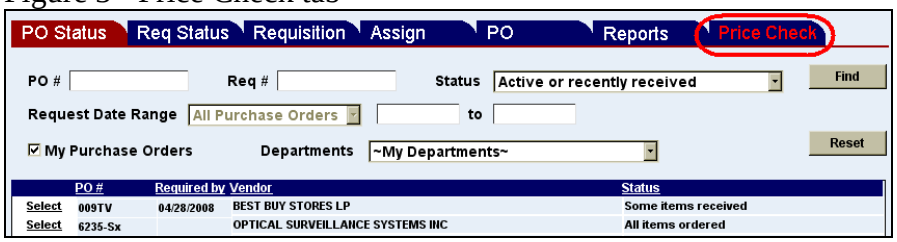
Figure 2 - Price Check Status



Purchaser:

1. The purchaser will now see a **Price Check** tab on their screen.

Figure 3 - Price Check tab

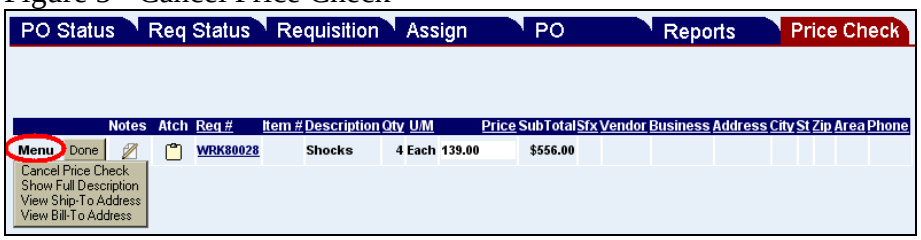


2. On the **Price Check** screen, enter the actual price in the **Price** field.

Figure 4 - Price Check screen

3. If needed, click the requisition number (**Req #**) t view the requisition details.
4. To add explanatory notes, click the **Notes** icon
5. To add scanned documentation, click the **Atch** icon.
6. Click **Done** when finished. The line item will be removed from the **Price Check** screen. If there are no more price checks, the **Price Check** tab will not be displayed.
7. To cancel a price check (for example, if a requester verifies the price with the vendor), click **Menu** next to the line item and click **Cancel Price Check**.

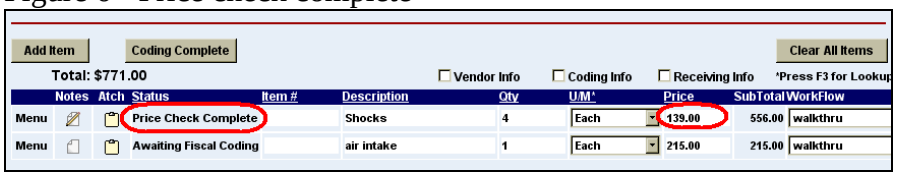
Figure 5 - Cancel Price Check



Requester/Authorizer/Fiscal Coder:

1. On the Requisitions screen, the line item status will be **Price Check Complete** (or **Price Check Cancelled** if it was cancelled) and the updated price from the purchaser will be automatically entered.

Figure 6 - Price check complete



2. Click the **Notes** and **Atch** icons if the purchaser to view any notes or attachments from the purchaser.
3. You can accept the price or change the line item as needed.
4. Continue with the requisition process.