

Purchasing Database Instructions

****Open Filemaker Pro in the HULAFiles directory only to keep everything current****

Opening database:

1. Go to the **FilemakerPro database folder in JohnsonLabShare**. Instructions are updated in this folder so check periodically in case procedures have changed.

To make a new PO:

1. Open **PO_log.fp7** and click **New Record** icon on the tool bar (or go to the "Records" tab and click "New Record")
2. Check that the requisition number has changed to the next consecutive requisition number (if not, See Notes below)
3. Check the submission date is the date the requisition is created (should automatically update with today's date)
4. Choose the account code from the drop down menu
5. Verify the delivery and billing addresses are correct (Choose from drop-down menu)
6. Find vendor from the drop down menu (if not there, add name and contact information to VendorInfo.fp7 database. To do this open the VenderInfo.fp7 database and click on **New Record** under the "**Records**" tab to add a new line to the database. Add all relevant information – name of company, contact info, etc.)
7. Save PO_log as pdf file
 - Click Save/Send Record As -->pdf
 - Save in HULAFiles--> FilemakerPro_database --> Requisitions
 - Save as "req_XXXX.pdf" where XXXX is the requisition number
 - Also, under the heading "save" choose the option "**current record only**" so that only the requisition you're working on is saved (otherwise all previous requisitions will also be saved to the same file)
8. **E-mail Zackary (zij@hawaii.edu) pdf** and he will place order.
9. Check to see if purchases have been automatically updated in the PurchaseLogAll.fp7 database (*PurchaseLogAll.fp7 keeps a record of all items purchases according to requisition number, so if you are ordering items we've purchased before, you can look up item numbers here using the magnifying glass icon*)

Side Notes:

If the "Johnson requisition #" is ever different from the "Record" number given in far left panel, you can change it by going to:

File → Manage → Database → highlight "Requisition#" and choose the options on button in the far right corner → under "Serial number" adjust "next value" to correspond to the current record

Instructions when receiving shipments:

Please update the PurchaseLogAll.fp7 database →

"**Received_By**" field update with your initials

"**Received_Date**" field update with the date the shipment was received

"**Location**" field update where the shipment was received (MSB 622 or Biomed)

To add a new vendor:

1. With Filemaker open, go to Open --> HULA files --> Filemaker database --> VendorInfo.fp7
2. Click on Records --> New Record

3. Add all pertinent information to the appropriate columns (i.e. Vendor, Account#, Address, etc)

To find previously purchased items:

1. Open **PurchaseLogAll.fp7**.
2. Select the **magnifying glass** icon in the upper left hand corner of this table (or go to "View" → "Find Mode").
3. Type in a key word in the "description" column or catalog number in "catalog#" column and press enter.