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# Purchasing / Warehouse

## INTRODUCTION

Our mission is to effectively meet the educational needs of our students and community by providing District-wide support to our schools and employees. Procurement policies and procedures are established so that California law and best practices are followed in order to:

- Save the District money, time and risk
- Protect the District against liability, fraud, and inappropriate business practices
- Embody the “7 Rights of Purchasing” which are –

Obtain the right materials or services (meeting quality requirements), in the right quantity for delivery at the right time to the right place from the right source (a responsive and responsible supplier) with the right service at the right price

Most activities on campus include the involvement or support from Purchasing, from furnishing new schools to daily delivery of mail. As a service department, Purchasing is committed to assisting school sites and district departments with their procurement, delivery, and communication needs.

The responsibility for the procurement of materials and services for the District is centralized in the Purchasing Department. All District procurement transactions shall be conducted in an efficient and business-like manner, and shall be based upon the highest standards, ethics, and transparency. Purchasing staff conduct business related to the procurement of products and services on behalf of the District in accordance with all applicable California procurement statutes, laws, and regulations. Procurements will be made on the basis of quality, price (or best value, as appropriate), and delivery terms offered for required materials or services.

***The selection of materials and services to be procured is the responsibility of the requisitioning Site or Department*** subject to District standards and/or legal requirements. The Purchasing Department shall have the authority to require or make recommendations concerning the purchase of equivalent and/or substitute items. Additionally, the Purchasing Department reserves the right to procure the required materials or services from vendors which it selects and considers to offer the most advantageous terms to the District.

The Purchasing Department and District Warehouse together provide a centralized receiving environment for the Roseville City School District. Most district purchases are ordered by, delivered to and processed by Purchasing and District Warehouse personnel. Upon verified receipt, goods and materials are delivered to the requesting departments and sites, usually within 1-2 working days.

Additionally, the Warehouse stocks and supplies Risograph supplies, white copy paper, and laminating film following the annual Warehouse Delivery Schedule.

The Purchasing Department staff is available to facilitate sites in acquiring surplus furniture or equipment in addition to the removal and/or disposal of surplus furniture and e-waste. We support departments and sites with regard to printer maintenance and the district fleet of Toshiba copiers, as well as provide information and assistance regarding approved vendors, quotes, bids and any other procurement-related matters.

The Purchasing Department is open Monday through Friday, 7:00 a.m. until 3:30 p.m. Lori and Penny are available at (916) 771-1610, extensions 50162 and 50163.

The District Warehouse is open Monday through Friday 7:00 a.m. until 3:00 p.m. Freight receiving hours are posted as 11:00 a.m. until 2:30 p.m.; however, appointments for freight deliveries are encouraged and can be arranged by calling (916) 771-1610 extension 50169.

## **PURCHASING & WAREHOUSE STAFF**

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## PURCHASE ORDERS

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### GENERAL PROCEDURES:

#### A. **Paperwork Preparation**

1) Requisitions-

Orders must be input in the electronic purchase order system and shall include the appropriate vendor number, description of item, quantity, price, shipping and handling, sales tax, total, and account number. To request a new vendor number, please contact the Purchasing Department. If you do not know which vendor to use, contact Purchasing.

2) Approvals-

The site or program administrator must first approve all requisition orders. Additional approvals from Ed Services, Technology and Business may be required before final approval by Budget.

3) **A purchase order *should* be used for all purchases. In accordance with the California Ed Code 42632 and 17605 only authorized individuals as appointed by the Governing Board of Education can obligate District funds.**

\*Purchases made without an authorized Purchase Order *may* become the financial responsibility of the individual making the purchase.

***\*\*\*If a vendor does not accept purchase orders please see "Use of District Credit Card."***

4) Furniture, Equipment, Technology Purchases **must be in accordance with District standards**. Before ordering any furniture, equipment or technology, please contact Purchasing, Technology and Educational Services for guidance.

When ordering computers or peripherals, please follow these procedures:

- Contact Technology Services to communicate special needs
- Contact Technology Services for current District approved standards and prices (unless it is a replacement item). Complete "Request for New Technology" form which is located on our district website under Technology/New Technology Request
- Include all information on District purchase requisition and submit for approval

## **5) Conferences/Workshops**

Payment for conference/workshop attendance may be accomplished by submitting a requisition. The purchase requisition should identify if prepayment of registration fees for the conference/workshop is required for a vendor that does not accept purchase orders with registration. Be sure to include the following information in the requisition in order to ensure efficient/timely processing of a purchase order and payment:

- Conference/Workshop Name
- Person(s) attending conference/workshop
- Date(s) of conference/workshop
- Location of conference/workshop
- Completed vendor conference registration form
- Message After – Site will place order

It is important to always attach a PDF copy of the COMPLETED conference registration to your requisition. The vendor's conference registration form often contains vital payment information required by either Accounting or the conference or workshop vendor.

Please note, for reservations, registrations or subscriptions, it is the *responsibility of the site* to fax a copy of the purchase order to the vendor if required.

## **6) Emergency Purchases**

In the event of an extreme emergency during non-working hours it may be necessary to take prompt action to safeguard district property or the safety of pupils and/or employees. A confirming purchase order may be necessary in this situation. Contact the Purchasing Department for procedures.

## B. Purchase Order Processing

Purchase orders are processed electronically using the Escape procurement system.

- 1) Site/department personnel enter requisitions and submit them for approval. The approval process is automated and is generally obtained in the following order:
  - Immediate Supervisor
  - Education Services, Technology for technology purposes
  - Purchasing Supervisor
  - Business Services

Once the purchase order has been processed, the Purchasing Department will place the order with the vendor on behalf of the generating site in accordance with the instructions listed on the purchase order. A digital "confirming" copy of the purchase order will be emailed to the generating site. It is the responsibility of the site to follow the progress of their requisitions until they receive the "confirming" copy of their purchase order. Further it is the responsibility of the site to follow the progress of their purchase order through to the receipt of ordered materials.

- 2) Site/department personnel must indicate pre-payment and faxing instructions in the "Message After" field of the last line item on the purchase order. Requisitions without instructions will be denied pending correction. Purchasing will send a notification e-mail explaining the denial and instructions.
- 3) Immediately upon receipt of an order in the district warehouse, all items are counted and verified by warehouse personnel. Receiving documentation is then electronically attached to the requisition in the accounting software (Escape), and receipt of goods is directly input into Escape.
- 4) Any merchandise received at a site directly from a vendor via outside carrier (UPS, FedEx, etc.) must be **immediately verified** and all receiving documentation sent to Purchasing for processing. Any discrepancies should be reported to the vendor within 24 hours of receipt.

### **C. Fixed Assets Inventory-RCSD#**

- 1) An RCSD Fixed Asset Inventory bar code label is assigned by Purchasing at the time the purchase is being processed. An RCSD# is assigned for any piece of equipment valued over \$500. Equipment which may have a lesser value such as iPods, cameras, electronic tablets, or musical equipment may also require asset barcoding. If equipment is used for a purpose other than that for which it was originally purchased, the Purchasing Department shall be notified with a dated statement justifying its current use.

The date and mode of disposal of all equipment removed from the inventory shall also be recorded.

### **D. Open PurchaseOrders**

When necessary, Open Purchase Orders on which a series of purchases may be made from one vendor, are allowed up to a specified amount and **for a stated period of time**. Please indicate all individuals (First & Last Names) who are authorized to make purchases on the PO. Sales tax does not need to be included. OPEN PURCHASE ORDERS ARE PRIMARILY AUTHORIZED ONLY AT THE DISTRICT DEPARTMENT LEVEL.

### **E. 30-day Preview or Evaluation**

Items desired on a 30-day trial basis are to be ordered only on a purchase order. They **ARE NOT** to be requested by phone or by letter. After the item description, state on the purchase order "ordered on 30-day approval".

Before the end of the 30-day period it is the responsibility of the school/department ordering to either:

- a Advise Accounts Payable they are keeping the item and to authorize payment of the invoice or,
- b Advise Purchasing in writing that you wish to return the item(s). We then will return the items and notify Accounts Payable not to pay for these items.

### **F. Advance Payments (Pre-pays)**

The Education Code limits advance payments to government agencies, publications, subscriptions and like items. School Districts are not allowed to pay in advance for any other goods or services. Purchase orders are required with a written request for advance payment and backup documentation, (Pre-Pay) i.e., registration forms, etc.

## **G. Purchase Order Cancellations. Changes. Shipping & Returns**

### **1) Cancellation:**

Occasionally it is necessary to cancel a purchase order. When this occurs, notify the Purchasing Department and Accounts Payable that you need to process a cancellation. Purchasing will help determine means of notifying the vendor of the order cancellation. Notice of the cancellation will clear files of pending orders and disencumber the dollar amount. ALWAYS NOTIFY PURCHASING of a Purchase Order cancellation.

#### To Cancel a PO or requisition in Escape

- In the "Tasks" toolbar, select Cancel
- Enter the reason for cancellation in Message
- Click "yes" to cancel

### **2) Change Order:**

If the need arises to make a change to a purchase order notify the Purchasing Department to assist in issuing a change order.

At times it is necessary for the school site to issue a completely new purchase order rather than a change order. In that case, reference the previous purchase order number and date in the new (replacement) purchase order. The original purchase order should then be canceled either by the generating site or purchasing department (see above).

### **3) Shipping:**

When shipping packages other than envelopes or for shipments requiring trackable carriers please complete a "Shipment" form (see 6b) and send to Purchasing to schedule pick up. This form should be used for any type of shipment (other than returns) as it ensures the chain of custody from originator to final destination.

### **4) Returns:**

It is sometimes necessary to return materials to a vendor for reasons such as incorrect or damaged items, or over-shipment. Contact the vendor to obtain an RMA and then complete a "Merchandise Return to Vendor" form. (see 6c) Send the form to Purchasing to schedule pick up. Return item(s) to the warehouse with the Return form attached. Call Purchasing to arrange for pick-up of large items.

Orders such as office and custodial supplies that are delivered directly to the site shall be returned to the vendor by having the person who originally placed the order contact the vendor to arrange pick up at the site where the product was delivered. If you are unsure, contact Purchasing for clarification.



Directions for returns:

Notify Purchasing using the Return Merchandise form. Note the purchase order number against which shipment was made and vendor's name, return address, vendor contact, what is to be returned, why it is to be returned, and disposition of the item. Include your account code for shipping costs.

Disposition could be replacement, exchange, or credit to be issued. Items to be returned must be in original shipping cartons. Notify the Purchasing Department within 10 calendar days of receipt of item to coordinate returns.

If returning items for exchange or replacement, the originator of the purchase must contact the vendor to make arrangements and obtain vendor return authorization (RA-Return Authorization or RMA-Return Merchandise Authorization from the vendor. Once complete, notify the Purchasing Department using the Merchandise Return to Vendor form. Contact the Purchasing Department with any questions.

**Items Already Received**

When issuing a purchase order for items already received, please state in the Message After field, "Confirming Purchase Order". This will authorize Accounts Payable to process for payment. **Should only be used on rare occasions.**

## **VENDOR SELECTION INFORMATION**

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### **Vendor Options**

This section is a compilation of vendor options for commonly ordered items. They are not listed in any particular order, but please remember that the district has contracts and relationships with many of these vendors. These already established relationships give us greater leverage when it comes to pricing, shipping charges, discrepancies and returns.

### **Selecting a Vendor in ESCAPE**

If you are uncertain which version of a vendor to use or if the vendor doesn't populate when entering a requisition, use the following steps:

- Finance
- Purchasing
- Vendors
- Enter first few letters of vendor's name in "Vendor Name" field
- Go

This will give options to choose from.

#### **\*\*\*\*IMPORTANT\*\*\*\***

Allow ESCAPE to default to the correct address. DO NOT CHANGE. If you have questions contact the Purchasing Department.

### **Vendor Numbers/Preferred Ordering Methods**

We've also included vendor numbers which should help when facing 9 different numbers for the same vendor name! The vendor's preferred ordering method will assist when you are determining which message after to select.

It is our hope that this is a "jumping off" document and that according to your input, we can add to or delete vendors. Please feel free to contact us with your suggestions.

**VENDOR OPTIONS**  
(in no particular order or preference)

7/18/2018

PRODUCT	Option A	Option B	Option C	Option D	Option E	Option F
Art Supplies	Nasco	Sax Arts & Crafts	Dick Blick	Office Depot	Staples	School Specialty
Books	Barnes & Noble	Bound to Stay Bound	Follett	Curriculum Assoc	The Library Store	PermaBound
Butterflies (live)	Insect Lore	Nature Gift Store (Amazon)				
Calculators	Nasco	Office Depot	School Mart	Staples	School Specialty	
Casters (table legs, chairs)	Shiffler	Service Caster Corp	Original Mfr - contact Purchasing			
Chair Glides (for student chairs)	Carpin	Shiffler				
Classroom Supplies	School Specialty	Office Depot	Staples	Lakeshore Learning		
Clothing Items	FiveSixteen	Customink	Palmer Signs	Just Print It Ink		
Drama	Music Theatre International	Pioneer Drama Service				
Electronic/Tech-related Purchases <b><i>ALWAYS check with Technology Department prior to purchase</i></b>	B & H Photo	Troxell	CDWG	PCMG	Apple	Dell
Electronic/Tech-related Repair <b><i>ALWAYS check with Technology Department prior to purchase</i></b>	Global Direct Parts					
Field Trips	Hamburger Farm	Fairy Tale Town	Alliance Redwoods	Grays Harbor	Roseville Theatre	Golfland Entertainment
Field Trips	Bishop's Pumpkin Farm	Sacramento Zoological	Discovery Museum	Gold Discovery Park Assoc	Mother Lode River Center	Bernhard Museum
Field Trips	Esquire iMax	Roseville Historical Society	Placer County Museums			
Furniture Repair and Miscellaneous Maintenance Supplies	Grainger	Shiffler	Global Industrial	Uline	School Fix	

**VENDOR OPTIONS**  
(in no particular order or preference)

7/18/2018

PRODUCT	Option A	Option B	Option C	Option D	Option E	Option F
Furniture/Equipment Classroom, Common Areas or Office <b><i>ALWAYS check with Purchasing Department prior to purchase</i></b>			School Outfitters	Campbell Keller		
Health Supplies	Meteor School Nurse Supply	School Specialty School Health Corporation				
Ink/Toner Supplies (not Toshiba)	Staples	Office Depot	Sehi			
Laminating Film *Warehouse offers original GBC brand - you can purchase generic brands from other vendors, but GBC is recommended						
	Warehouse*	School Specialty	Staples	Office Depot		
Lamps & Bulbs	Northstar	IVS	Troxell			
Library Supplies	Demco	School Specialty	Staples	Office Depot	The Library Store	
Maintenance Contracts	General Binding (GBC)	Risograph of Sacramento				
Music Related	JW Pepper	Guitar Center	Music is Elementary	Music in Motion		
Musical Instruments	Cascio Interstate Music	Woodwind Brasswind	West Music	Music Yard	Tim's Music	Peripole
Office Supplies	Staples	Office Depot	Quill	School Specialty		
Owl Pellets	Owl Brand Discovery Kit	Owl Pellets Inc				
Paper, Astrobright	Staples	Office Depot	School Specialty			
Paper, Cardstock, 8.5" x 11"	Staples	Office Depot	School Specialty			
Paper, Copy, Color, 8.5" x 11"	Staples	Office Depot				
Paper, Copy, White, 11" x 17"	Staples	Office Depot				
Paper, Copy, White, 8.5" x 11"	Warehouse	--				
Paper, Copy, White, 8.5" x 14"	Staples	Office Depot				

**VENDOR OPTIONS**  
(in no particular order or preference)

7/18/2018

PRODUCT	Option A	Option B	Option C	Option D	Option E	Option F
PE Uniforms	All Sports Equipment & Apparel	Rally Factory (D-3 Sports)				
PE/Sport Equipment	US Games	School Specialty Sportime	Gopher Sports	Palos Sports	S & S School Supply	Wolverine Sports
Planners, Student	Premier	School Date Books	School Mate	Lifetouch		
Printing Services	Document Works	Office Depot	Staples			
Rewards/Incentives	Oriental Trading Co	Fitness Finders	Teacher Direct	Lakeshore Learning	School Specialty	Amazon
Transportation	All West Coach Lines	Eureka Union School District				

## Vendor Numbers/Ordering Methods 7/18/2018

Vendor	Escape Vendor #	Ordering Method
All About Apparel	003037	fax
All Sports Equipment & Apparel	001461	email
All West Coachlines	000551	site places order
Alliance Redwoods	000579	site places order
Apple	001849	online
B & H Photo	001264	fax
Barnes & Noble	000806	email
Bernhard Museum	000951	site places order
Bishop's Pumpkin Farm	000696	site places order
Blick Art Materials	000348	fax
Bound to Stay Bound	000504	fax
Campbell Keller	002359	email
Carpin	002689	fax
Cascio Interstate Music	001180	fax
CDWG	000490	fax
Curriculum Associates	000310	email
Customink	001890	fax
Dell	000729	online
Demco	001673	fax
Discount 2-Way Radio	000948	fax
Discount School Supply	000560	email
Discovery Museum	002453	site places order
Document Works	000518	online
Esquire iMax Theater	000776	site places order
Eureka Union School District	000351	site places order
Fairy Tale Town	000783	site places order
Fitness Finders	000639	fax
FiveSixteen	002282	fax
Follett	002894	email
Frey Scientific (School Specialty)	001681	online
General Binding (GBC)	001683	fax
Global Direct Parts	003318	email
Global Industrial Equipment	000437	fax
Gold Discovery Park Assoc	001978	site places order
Golfland Entertainment	000628	site places order
Gopher Sports	000256	fax
Grainger	000734	fax
Grays Harbor Historical Seaport Authority	002798	site places order
Guitar Center	001442	fax
Hamburger Farm	002374	site places order
Insect Lore	000307	fax
IVS	001763	email
Just Print It Ink	003524	fax
JW Pepper	000385	fax
Lakeshore Learning	000915	online
Lifetouch	003434	fax
Meteor	002206	email
Mother Lode River Center	000319	site places order
Music in Motion	003254	fax
Music is Elementary	001418	fax
Music Theatre International	001042	fax
Music Yard	003181	email
Nasco	000371	email
Northstar	003334	email

## Vendor Numbers/Ordering Methods 7/18/2018

Vendor	Escape Vendor #	Ordering Method
Office Depot	000798	online
Oriental Trading Co	000253	fax
Owl Brand Discovery Kit	003474	fax
Owl Pellets Inc	002349	fax
Page Protector Store	000869	fax
Palmer Signs	001079	fax
Palos Sports	002238	fax
PC & Mac Exchange	001111	fax
PCMG (PC Mall Gov)	002177	email
Peripole	003241	email
PermaBound	000287	fax
Pioneer Drama Service	002647	fax
Placer County Museums	000784	site places order
Premier	000583	fax
Project Lead the Way	002272	email
Quill	001701	fax
Rally Factory (D-3 Sports)	002064	fax
Risograph of Sacramento	000433	fax
Roseville Historical Society	003540	site places order
Roseville Theatre	002463	site places order
S & S Worldwide	000539	fax
Sacramento Zoological Society	000654	site places order
Sax Arts & Crafts	000582	online
School Date Books	000842	fax
School Fix	003053	fax
School Health Corporation	000294	fax
School Masters Safety	000386	fax
School Mate	000886	fax
School Nurse Supply	000573	fax
School Outfitters	001087	email
School Specialty	000623	online
SchoolMart	000863	fax
Service Caster Corporation	003498	fax
Shiffler	001742	fax
Sportime (School Specialty)	000398	online
Staples Business Advantage	000497	online
Teacher Direct	001069	fax
The Library Store	000345	fax
Tim's Music	002425	fax
Troxell	000442	email
Uline	002000	fax
US Games	000908	online
West Music	002911	fax
Wolverine Sports	002166	fax
Woodwind Brasswind	000662	fax

Vendor Number July 2018

## AMAZON

Roseville City School District has established a purchasing partnership with Amazon Business. The Amazon Business Marketplace is a great destination to purchase non-contract items. BUT REMEMBER: The District maintains relationships with many approved vendors (see previous section). Amazon is *not always* the best option.

These categories have been approved district wide for non-contract purchases through Amazon Business:

<a href="#">Books</a>	<a href="#">Home and Kitchen</a>
<a href="#">Office Supplies</a>	<a href="#">Musical Instruments</a>
<a href="#">Classroom, School, Art Supplies and materials</a>	<a href="#">Animal Supplies, Equipment and Food</a>
<a href="#">Scientific Equipment and Lab Supplies</a>	<a href="#">Clothing and Uniforms</a>
<a href="#">Miscellaneous, Hard to Find Items</a>	

This centralized Amazon Business account gives you access to:

- Complimentary access to Amazon's Business Prime Shipping benefit and receive ***FREE 2-Day shipping on Prime eligible items with no order minimum*** through 12/31/18.
- Business pricing and quantity discounts on millions of items
- Access to a specialized business only Customer Service team at 866.486.2360

## PRICING and PURCHASE ORDERS

As a marketplace, Amazon pricing fluctuates according to demand, so pricing for items placed in a shopping cart can change at any time. A bonus of this partnership is that once you place items in your shopping cart, prices are frozen for those items for seven (7) ***calendar*** days - including holidays and weekends. This gives you time to generate a purchase order and still take advantage of the pricing.

### IMPORTANT TO NOTE:

- Follow the progress of your requisition to be sure that all approvers are signing off. This will ensure that the requisition becomes a purchase order within the seven (7) day window.
- Orders that have delayed requisitions and cannot be released by Purchasing prior to the end of the 7 day window will be automatically kicked out of Amazon's system and the person who placed the order will receive notification of cancellation directly from Amazon.
- Amazon vendor number –003511
- Message After – Do Not Prepay, Place OrderOnline

Please see attachments for Acceptable Use Policy and FAQ, Administrator Guide, Guide for Approving Orders and Registration Guide





## Amazon Business Acceptable Use Policy

### What am I able to purchase on Amazon Business?

From books to scientific lab supplies and everything in between, the Amazon Business Marketplace is our preferred destination for all non-catalog purchases. Please shop Amazon Business first when shopping for non-catalog products.

These categories have been approved district wide for non-catalog purchases through Amazon Business:

<a href="#">Books</a>	<a href="#">Home and Kitchen</a>
<a href="#">Office Supplies</a>	<a href="#">Musical Instruments</a>
<a href="#">Classroom, School, Art Supplies and materials</a>	<a href="#">Animal Supplies, Equipment and Food</a>
<a href="#">Scientific Equipment and Lab Supplies</a>	<a href="#">Clothing and Uniforms</a>
<a href="#">Miscellaneous, Hard to Find Items</a>	

[Watch this video](#) to learn how to optimize your Amazon Business shopping experience.

### What items are restricted on Amazon Business?

Roseville City School District kindly asks that you continue to follow all existing purchasing policies related to items already on contract with the District. To help identify if an item does not comply with the District's purchasing policies, you will see restricted messaging on the product detail page and business order information page. **\*Please note, if you would like to purchase an item that is labeled RESTRICTED, please contact your Purchasing Department for approval.**



**Company restricted**  
This item may not comply with the purchasing standards for your organization.

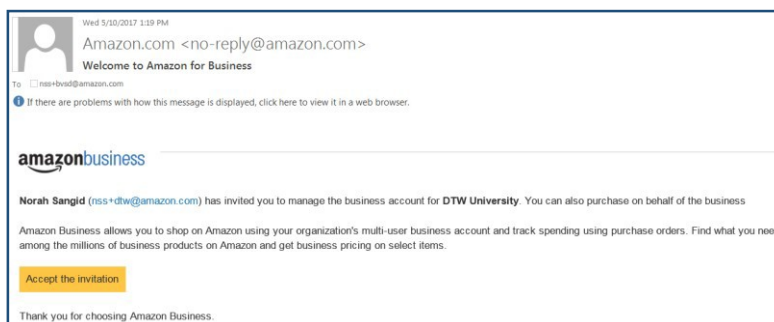
### Can I use the Roseville City School District Central Amazon Business account for personal use?

The central Amazon Business Account must be used for business purchases only, in accordance with our purchasing policies. The Roseville City School District purchasing team will have access to all purchasing history made through the centralized Amazon Business account.

## Activating your Amazon Business account

### How do I create my Amazon Business account?

Access Amazon Business by clicking the link directly from the activation email you receive. The activation email will look similar to the one below, the subject line is "Welcome to Amazon Business". The first time you access Amazon Business, you will be prompted to create an Amazon Business account. **Use your @rcsd8.org email address and enter a password.**



### I already use my @rcsd8.org email address to make PERSONAL Amazon.com purchases.

If your @rcsd.org email address is already associated with an Amazon.com account, you will have the option to split off and transfer any purchase history to a separate account. You will be prompted to enter a new, personal, email address (e.g. gmail.com or Hotmail.com).

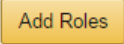
## Manage Your Business

To access account management tools such as groups or users, go to the **Manage Your Business** section of your account.

- Hover over **[User]'s Account for Business > Manage Your Business**.

## Invite Users

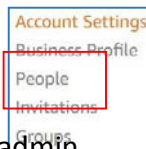
To add a user, go to the **Manage Your Business** section of your account. Once there, click the yellow **"Add People"** box.

- Enter the individual's school email address. The buyer will create a password, but the email for their login will not change.
- Select purchasing permissions (Requisitioner, Administrator).
  - [Requisitioners](#) can place orders but only have visibility into their own account history.
  - [Administrators](#) manage people, groups, roles, etc. and can view the orders of others and run reports.
- Invite the end user by selecting **Add Roles**. 
- Requisitioners can be removed from the account at any time under the **People** section of the account.

## Pending Invitations

Keep track of users in the **People** and **Invitations** sections of the menu at left.

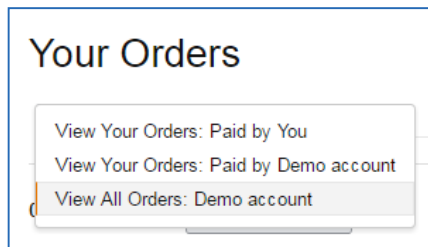
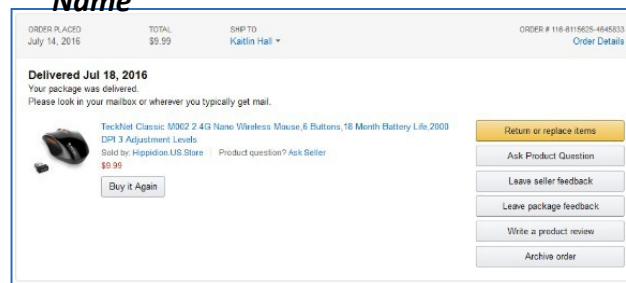
- Buyers listed in the **People** section have already accepted their invitation. As an admin you have visibility into their purchases
- Buyers listed under **Invitations** have not yet activated their accounts. Once a user is invited, **they have 21 days to activate their account** and complete.
- If a Requisitioner does not accept their invitation in this timeframe, the invite is listed as **Expired** in the invitations section. **Resend** the invitation to ensure the Requisitioner can register.



## Your Orders

To access the order history for your School or Department, hover over **your Account for Business**, select **Your Orders**.

- To view the orders of other users in the account or group, toggle down to the **View All Orders: Organization Name**



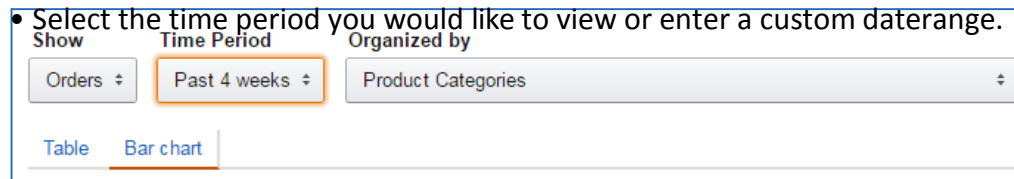
## Business Analytics

Use Business Analytics to view orders in either a Bar Chart or Table view.

- The bar chart view is recommended for reviewing your purchases over time.
- The table view provides order detail information and can be downloaded as a CSV at the right of the page.

To view spend analytics reports, hover over **your Account for Business**, select **Business Analytics**.

- Choose to show Orders, Returns, Refunds, or Reconciliation details.
- Select the time period you would like to view or enter a custom date range.



**When I click Accept the Invite in the activation email, I am prompted to log in. I do not know my log in credentials.**

You are asked to log in when you click the link in the activation email because you have an existing account with Amazon. If you do not remember your Password, please call Customer Service and ask for a link to reset your Password. Customer Service can be reached at 866-486-2360.

**I previously used my @rcsd8.org email address to register for a verified Amazon Business account.**

If you previously used your @rcsd.org email address to register for a verified Roseville School District Amazon Business account, you will need to de-register that account. All previous, stand-alone, Amazon Business accounts will be consolidated under the new, centralized account. Visit <https://amazon.com/gp/b2b/manage/deregister> to complete the de-registration process before accessing Amazon Business for the first time.

## Ordering and Returning Items

**What do I do if my order is rejected?**

If your order is rejected through the approval process, please talk with your department/school administrative assistant to discuss and re-order if necessary.

**How do I return or exchange an item?**

To return or exchange an item, hover over (User)'s Account for Business → Orders to view your complete order history.

- Select Return or Replace items at right of product image
- Select reason for return
- Print label and authorization
- Prepare package and return label
- Complete the RCSD **Merchandise Return to Vendor** form
- Provide package and Merchandise Return to Vendor form to your admin assistant

Items shipped and sold by Amazon.com orders can be returned within 30 days or receipt of shipment.

If shipped and sold by a 3<sup>rd</sup> party, policies can vary. If you have questions you can contact the Amazon Business customer service team.

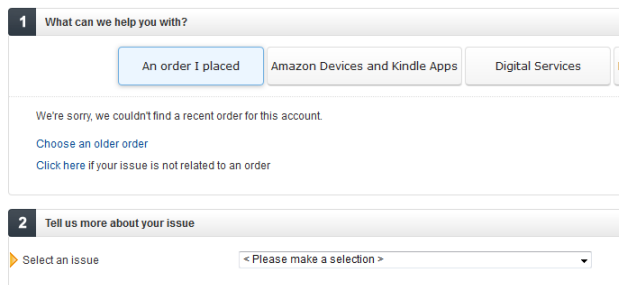
## Amazon Business Customer Service

**How do I contact Amazon Business Customer Service?**

Amazon Business Customer Service is available seven days a week from 5 am to 9 pm PST.

The **Contact Us** link is available at the bottom of every Amazon webpage (**Let Us Help You > Contact Us**) and provides Live Chat, Self-Service options, and requires no additional business account authentication.

### Contact Us



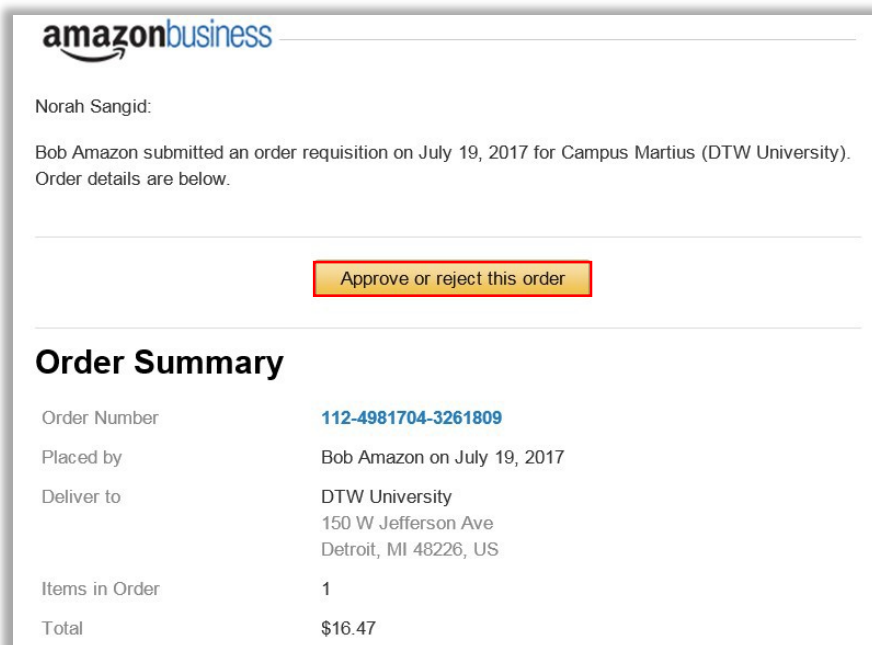
The screenshot shows the 'Contact Us' form on the Amazon Business website. It is divided into two main sections. The first section, titled '1 What can we help you with?', contains three buttons: 'An order I placed' (highlighted in blue), 'Amazon Devices and Kindle Apps', and 'Digital Services'. Below these buttons, a message states: 'We're sorry, we couldn't find a recent order for this account.' Two links are provided: 'Choose an older order' and 'Click here if your issue is not related to an order'. The second section, titled '2 Tell us more about your issue', features a dropdown menu labeled 'Select an issue' with the placeholder text '< Please make a selection >'.

## Guide to Approve Orders

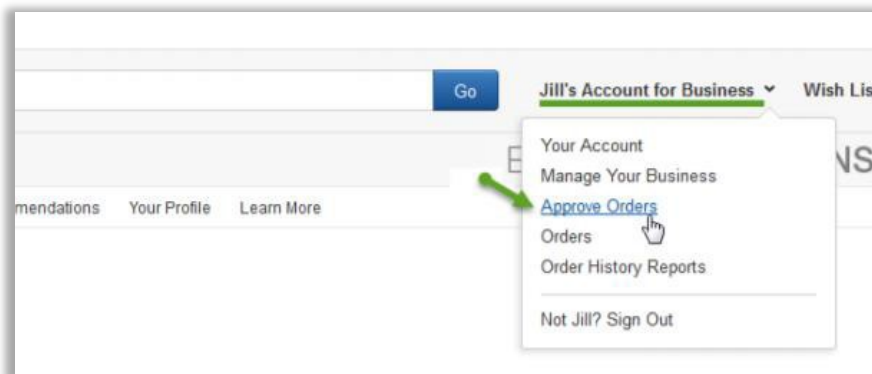
The following is a step by step guide on how to review, approve, or reject orders.

You will receive an email when an order has been submitted for approval. The email subject line is **“Order Approval Required”**. Review the order and create a requisition for the Purchasing to approve.

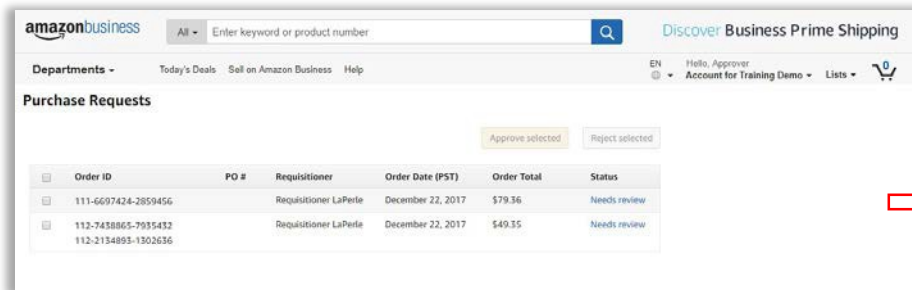
- ☐ Please note: Roseville City School District has **7 days to approve or reject an order including approval by Purchasing**. Within those 7 days, prices **DO NOT** fluctuate. If the order is not approved within 7 days, it will be automatically cancelled.



You can navigate to the details of this order from the body of the email by selecting **Approve or reject this order** (see above example) OR log on to Amazon.Com and select **Approver Orders** from the drop-down menu of your Account for Business.

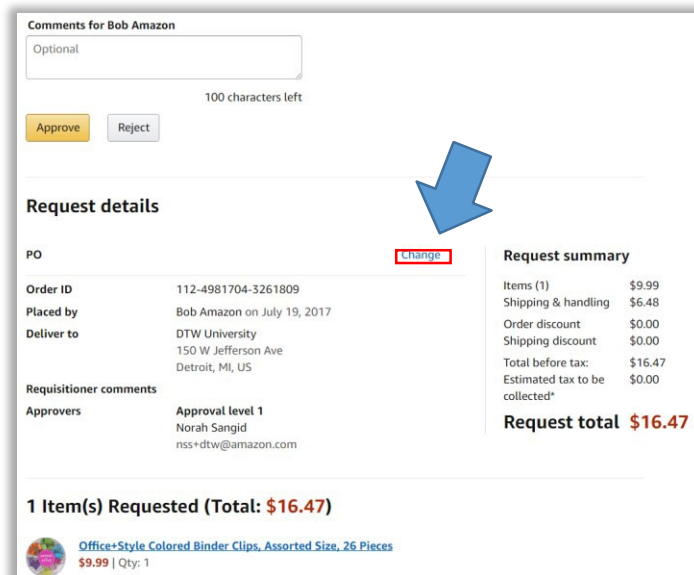


Any orders that require review and action are listed. You can select **Needs review** to review and approve or reject each item in the request and add requisition number to the order.



Order ID	PO #	Requisitioner	Order Date (PST)	Order Total	Status
111-6607424-2850456		Requisitioner LaPerle	December 22, 2017	\$79.36	<a href="#">Needs review</a>
112-7458865-7955432 112-2134895-1302636		Requisitioner LaPerle	December 22, 2017	\$49.15	<a href="#">Needs review</a>

Before you approve an order, it is important that you select **Change** next to the PO field and change this field to the approved requisition number before sending for Purchasing approval.



Comments for Bob Amazon

Optional

100 characters left

[Approve](#) [Reject](#)

**Request details**

PO [change](#)

Order ID: 112-4981704-3261809

Placed by: Bob Amazon on July 19, 2017

Deliver to: DTW University, 150 W Jefferson Ave, Detroit, MI, US

Requisitioner comments: Approval level 1, Norah Sangid, nss+dtw@amazon.com

**Request summary**

Items (1) \$9.99

Shipping & handling \$6.48

Order discount \$0.00


Shipping discount \$0.00

Total before tax: \$16.47

Estimated tax to be collected\* \$0.00

**Request total \$16.47**

**1 Item(s) Requested (Total: \$16.47)**

 [Office+Style Colored Binder Clips, Assorted Size, 26 Pieces](#)  
\$9.99 | Qty: 1

If you want to reject an item on the request but approve other items, scroll down to the Item(s) Requested list and click

[Mark as rejected](#)

The item will be removed from the order and will show under Item(s) Requested as Item(s) marked for rejection. This allows you to change back again, if needed, by selecting "Cancel rejection and mark as approved" before approving the request.

Once you have changed the PO field to include the requisition number, select **Approve**.

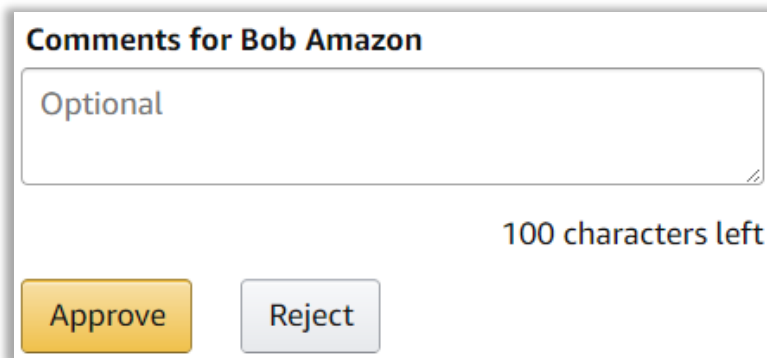
The order will automatically be sent to Purchasing for approval and PO number.

## Guide to Rejecting all items in an Order

To reject an order, you simply choose Reject

- ☐ You can add comments for the end user as to why the order was rejected
- ☐ If you need end user to revise the order, you can:

- 1) Reject the order and use the comment box to request the revisions



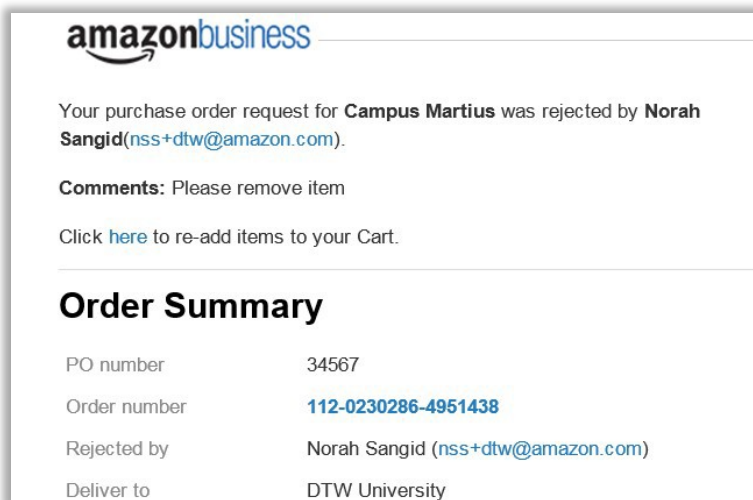
**Comments for Bob Amazon**

Optional

100 characters left

Approve Reject

- 2) The end user will have an opportunity to modify their cart and resubmit the order for approval.
- 3) Their cart will remain intact, they simply need to click the **“here”** link within the email they receive to revise their order and resubmit the order for approval to you.



**amazonbusiness**

Your purchase order request for **Campus Martius** was rejected by **Norah Sangid**([nss+dtw@amazon.com](mailto:nss+dtw@amazon.com)).

**Comments:** Please remove item

Click [here](#) to re-add items to your Cart.

---

**Order Summary**

PO number	34567
Order number	<b>112-0230286-4951438</b>
Rejected by	Norah Sangid ( <a href="mailto:nss+dtw@amazon.com">nss+dtw@amazon.com</a> )
Deliver to	DTW University



# amazonbusiness First Time Set-up Guide

1. You will receive an email inviting you to join your organization's Amazon Business account. Click on **Accept the invitation** Invitations are time sensitive.
2. If you do not receive your invitation, please check your spam folder. The email will come directly from Amazon Business.
3. Choose the scenario below that applies to you and follow the instructions.

## Scenario 1

### Create a new business user account

- If you don't have an existing Amazon account tied to your work email address, you will be provided step-by-step instructions to create your new account log-in for your organization's Amazon Business account.



- Please be sure to use your full name when completing this form (First Last).
- Once your account has been created, you can start shopping.

Start shopping

## Scenario 2

### Migrate your existing Amazon Account

- If you already have an Amazon account tied to your work email address and utilize this account solely for business purchases, you can migrate this existing account to your organization's Amazon Business account.
- Sign in using the same password that you already use for your existing Amazon.com account.



- To migrate this account, including order history, select the right hand option: **Use My Existing Account**.
- Confirm that you will be using this account for Business purchases. This will not affect any personal Amazon accounts you have set up with different emails.

Confirm and continue

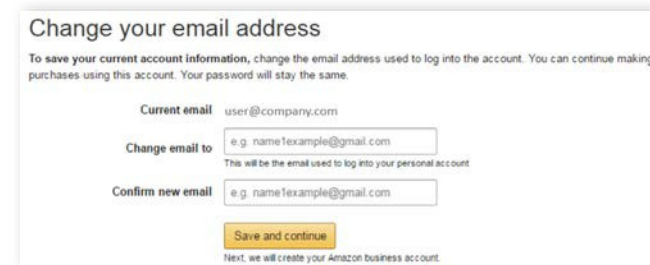
- **Complete** your registration and **Start Shopping**.

*If you cannot remember your password, you can click **Forgot your password?** to reset it.*

## Scenario 3

### Separate Business & Personal Shopping

- If you have an existing Amazon account tied to your work email and utilize this account for business & personal purchases, Amazon recommends changing your existing account to a personal email address in order to associate your work email with a new account for business.
- After clicking **Accept the invitation**, sign into your account with your existing password.
- When prompted to **Choose an Account option**, select **Create a Separate Account**.
  1. Update the email on your existing account to a personal, non-work email address. *The new email address cannot be associated with an existing Amazon.com account.*



1. Complete the registration steps to create your new account for business.
- Complete the set up for a new account following steps in Scenario 1.

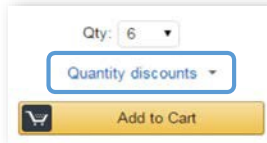


# amazonbusiness Purchasing Reference Guide

## The Business Marketplace

You will find a number of new tools and features, including:

**Business-only pricing**  
**Chat with a live expert**  
**Quantity discounts**

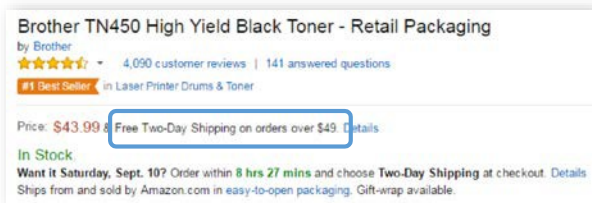


## Business Shipping

When shopping on the Business Account, you will receive FREE 2-Day shipping on eligible orders of \$49 or more. These items are either:

- Prime Items
- Items shipped and sold by Amazon.com

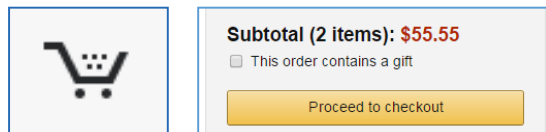
Items that are eligible for business shipping are clearly identified next to the price.



## Your Cart

As you shop on Amazon.com you can continue to add to your cart. You can view the contents of your cart anytime at the top right of the screen.

- Click the card to proceed to check out.
- Before checking out you may edit quantities, remove items or save for later.



## Shipping & Payment

As a part of your organization's business account, the payment method and shipping addresses have already been added for you. When completing the checkout process, simply confirm that the correct option is selected.

- If multiple options are listed, choose between those available
- If the appropriate info is not listed, contact your administrator

## Order Approval

Before your order is processed, it must be approved by your pre-designated approver. To request approval, complete the checkout process selecting **Submit for Approval** at the end. Once your order is submitted, you will receive 2 emails.

- Order confirmation: includes order number and specific delivery details
- Approval confirmation: after order is approved and is being processed

## Recurring Deliveries

To access the recurring delivery storefront select **(User)'s Account for Business > Recurring Deliveries**.

- Recurring deliveries always ship for free.
- Easily edit frequency, delivery date, or quantity.

## Returns & Exchanges

To return or exchange an item, hover over **(User)'s Account for Business > Orders** to view your complete order history.

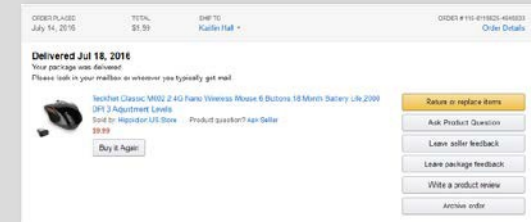
- Select **Return or Replace items** at right of product.
- Select reason for return.
- Print label and authorization.
- Prepare package and return label.

\* Items shipped and sold by Amazon.com can be returned within 30 days of receipt of shipment. If shipped and sold by a 3<sup>rd</sup> party, policies can vary. If you have questions you can contact Amazon Business customerservice.

## Reporting and Reconciliation

### Your Orders

To access this view of your order history, hover over **(User)'s Account for Business > Orders**.

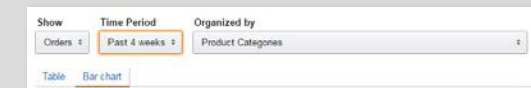


To print individual invoices, select **Order Details > View or Print Invoice**.

### Business Analytics

To view spend-analytics reports, hover over **(User)'s Account for Business > Business Analytics**.

- Choose an option to show Orders, Returns, Refunds, or Reconciliation details.
- Select the time period you would like to view.



- View orders in either Bar Chart or Table view.
  - The bar chart view is recommended for reviewing your purchases over time.
  - Table view provides order detail and can be downloaded as a CSV.





## CONTRACTS & AGREEMENTS

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### MAINTENANCE AGREEMENTS

Copier, Printer, Riso (district supported), and Laminating Machine maintenance agreements and purchase requisitions are prepared and submitted by Purchasing Staff on an annual basis for both Board approval and PO processing. Sites will be contacted to verify continuation of annual maintenance agreements.

### COPIERS/PRINTERS

Toshiba Business Solutions is available Monday through Friday 8:00 a.m. to 5:00 p.m. to answer your questions, or to schedule a service visit. Go to the District website under Purchasing Services/Toshiba Support and submit requests using the provided links or:

Reference the Toshiba label on your machine

- Service or Supplies 1-888-417-2000
- Automated Service 1-888-417-2002
- When calling please provide the equipment ID number for the machine

Please feel free to contact our District Account Manager for Toshiba Business Solutions with any non-service copier related questions: [john.schneider@tbs.toshiba.com](mailto:john.schneider@tbs.toshiba.com).

### CONSULTANT, INDEPENDENT CONTRACTOR & PROFESSIONAL SERVICES AGREEMENTS

Payment authorization for consultant/independent contractors that have been Board approved to provide product and/or services is accomplished by submitting a requisition through ESCAPE. If the services are ongoing throughout the school year and will require more than one payment, it is recommended that an Open requisition be submitted. If the services are for a one time service, a single requisition is recommended.

Pursuant to Government Code 53060, special services and advice in financial, economic, accounting, engineering, legal, or administrative matters are specifically excluded from the Public Contract Code and its bid requirements. Although special services are generally considered time specific in nature, continuing contracts for services to be done will not exceed five years including extensions.

Be sure to include the following information in the requisition in order to ensure efficient/timely processing of a purchase order and payment:

- Scope of Work – Description of products and/or services being provided
- Date(s) of Service – What are the exact date(s) when services will be provided
- Location of Services – Where will the services be provided – include all sites
- Not to Exceed (if applicable)
- Message After - Pay Upon Invoice, Pre Pay, or Confirming

The following items are required to be attached to the requisition in order to process a purchase order:

- Completed agreement/contract/quote or proposal

## AUTHORIZATION

Procurement is the responsibility of the Governing Board; the prudent expenditure of tax dollars is a major policy function. All purchase orders and formal contracts must be approved by the Governing Board, with specific approvals indicated in the official Board minutes. Each transaction between the District and any other entity or person involving property transfer or the rendering of a service is a contract, and all contracts are subject to the approval of the Governing Board.

Guidelines are established by the Board through the adoption of Board policies, administrative regulations and department policy. The District's Purchasing Department guides the development and control of standards, procedures and forms that implement the purchasing policies established by the Governing Board.

## LEGAL PROVISIONS & CORRESPONDING BOARD POLICY

Governing Boards may delegate the power to contract to the District Superintendent or to a designated agent. The delegation of power may be limited as to time, money, or subject matter or may be a blanket authorization in advance of its exercise. However, contracts pursuant to such delegation shall not be an enforceable obligation against the District until ratified by the Governing Board. [EC §§ 17604-5, 35161, 81655-6]

*\*No other district personnel are authorized to encumber district funds*

## INSTRUCTIONS FOR USE OF PURCHASING DEPARTMENT CREDIT CARD

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Purchase orders are always the preferred method of procurement; however, there will be occasions when you will need to make other arrangements to make a site purchase.

Criteria for determining if this **SHOULD** be a purchasing department credit card purchase:

- 1) Vendor does not accept purchase orders AND
- 2) Product can only be purchased from this particular vendor OR
- 3) Price is significantly reduced by using the credit card procedure

Criteria for determining if this **SHOULD NOT** be a purchasing department credit card purchase:

- 1) Vendor accepts school district purchase orders
- 2) You want the order faster or it is a last second purchase
- 3) It is easier than processing a purchase order
- 4) It is for conferences or travel - all conference/workshop registrations must be made through Educational Services and all conference travel arrangements must be made through Business Services

### **Directions:**

- 1) Identify product and vendor of choice.
- 2) Contact Purchasing to determine if the credit card is the best option for making purchase and verify the availability of funds for the purchase.
- 3) Complete Credit Card Requisition form (see 6d) and submit to Purchasing. ***This is a fillable form.*** Please do not "hand-fill" form.
- 4) Order will be placed on site's behalf, paperwork will be submitted to accounts payable and designated account will be charged

When product is received in warehouse, documentation will be forwarded to AP to authorize payment.

## WAREHOUSE ORDERS

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The District Warehouse stocks a limited selection of items including white copy paper, laminating film and Riso supplies. These products are specified on the Warehouse Stock Listing. Items are issued upon request via the Warehouse Requisition, Form 44 (see 6a), with approval by the appropriate administrator(s). The Requisition is prepared at the site and is distributed as follows after the order is filled.

- Please discard all outdated forms and use current Form 44 (**revised 7/17**)

1 copy -To Originator after order has been filled

1 copy -To Purchasing after order has been filled

- Paper and Riso supplies are delivered approximately every third week per delivery schedule. Check with Purchasing personnel or on the district website in the Purchasing section for a current schedule of delivery dates
- "Emergency" orders of stocked warehouse supplies will be filled if time and delivery schedules allow and should be limited to one (1) case or carton
- Colored and specialty papers can be purchased directly from contracted office supply or school supply vendors
- Current pricing for Warehouse stores can be located under the Product Pricing tab of the Purchasing section on the District website

## **MAIL AND DELIVERIES**

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Daily service for intra-district mail, USPS, and package deliveries will be provided as detailed below. The following practices should be followed:

### **Intra-District Mail:**

- a. All intra-district mail should be in the District Office workroom mailboxes no later than end of the day to ensure next day's delivery to the sites. Mail at the sites should be in the mail bag by end of day to ensure next day delivery to the District Office. Site to site deliveries require an additional day.
- b. Outgoing mail should be sorted by destination and placed in large envelopes with destination written on outside.
- c. All packages require transmittal form (6a)
- d. Intra-District mail is delivered daily to all school sites and offices while office staff is present and as needed when campuses are closed. "Mini mail run" service is provided to Darling Way, Derek Place, District Office and the Post Office daily Monday through Friday when school is not in session.

### **U.S. Mail:**

- a. All U.S. mail needs to be in the District Office workroom no later than 1:00 p.m. each day to ensure same-day delivery. Mail received after 1:00 p.m. will be mailed the following day.
- b. U.S. mail is post marked through the postage meter and taken to post office daily at 2:30 pm
- c. Business Services needs 24-hour notice for bulk mailing jobs. Please let the District Office know that you will be bringing the job to the mail room. It may take up to 24 hours to get this mailing posted and delivered to the Post Office.

### **Warehouse Supplies Delivery:**

- a. Daily delivery schedule for warehouse supplies is updated annually and is available in the Purchasing section of the District website. Additionally, sites will now be notified via e-mail of upcoming deadlines.

### **Other Deliveries:**

- a. District warehouse receiving hours are Monday through Friday 7:00 am – 2:30 pm.
- b. Deliveries received in the warehouse will be distributed to the sites within three (3) working days
- c. Personal deliveries – recipient will be notified for pick up during warehouse hours
- d. PCOE Courier – Mail bin is picked up every Monday

## DONATIONS

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### CROWD SOURCING - such as Donor's Choose

- 1) Principal must approve prior to teacher initiating process
- 2) Principal should verify with Purchasing Department that items being funded meet district standards PRIOR to processing. (especially furniture, equipment or technology)
- 3) Make sure that items delivered to the District Warehouse, 1046 Main St., Roseville, CA 95678
- 4) Notify Purchasing of pending delivery and provide details of products expected, from where it is coming, and to whom it should be delivered.

### ALL OTHER DONATIONS (page 24, Business Procedures Manual 2018)

All items donated to the District must be in working condition. If a donation requires installation the district will estimate the cost and may require payment as a condition of accepting the donation. All technology equipment must meet current local standards and be reviewed and approved by the RCSD Technology Department prior to acceptance. Please complete a Donation Transmittal Form #73 (see 6h), which is available in the school office or the District Office from Business Services at ext. 109 (please use your best judgment--a form is not necessary for donations such as magazines, etc.). This form requires information about the item(s) received. Please complete it as thoroughly as possible and forward to Business Services.

#### **Equipment Valued at \$500 or More**

- 1) Equipment valued at \$500 or more must be logged into the District's fixed assets inventory system and must be affixed with an RCSD barcode label
- 2) Please send a copy of the Donation Transmittal (not for monetary donations) to Purchasing so that they may enter the pertinent information into the fixed asset inventory system and send you a barcode label to affix to the equipment
- 3) The Business Office will send a thank you/donation letter to the Donor. An estimated value will NOT be included
- 4) The Board of Education will formally accept the donation

If you have questions about these procedures, please call the Business Services Department or the Purchasing Department.

## **SURPLUS PROCEDURES**

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### **Submitting Furniture/Equipment into Surplus**

The purpose of the surplus program is to dispose of unusable furniture and equipment and to reuse functional furniture and equipment elsewhere within the district. The procedure for **submitting furniture and equipment for surplus** is as follows:

- 1) Furniture that is functional and usable but no longer needed shall be labeled as surplus using the Equipment Surplus/Disposal Form (see 6f) and placed in one central area of the facility in a protected area, out of the weather and inaccessible to vandals, NOT in electrical closets. Warehouse will arrange pick up date with site staff as quickly as schedules allow.
- 2) Furniture that is broken, unsafe or otherwise unusable shall be labeled as surplus using the appropriate form (see 6e) and placed in an area inaccessible to vandals. Those items which pose an immediate risk or danger will be removed immediately.
- 3) Furniture & Equipment surplus forms shall be sent to Purchasing for scheduling pick up.

### **Submitting Technology and E-Waste into Surplus**

- 1) Electronic equipment of all types shall be labeled as surplus using the appropriate form (see 6f) and placed in a protected area, out of the weather, that is accessible to the Technology staff for assessment.
- 2) Electronic equipment surplus and e-waste forms shall be sent to Technology for scheduling assessment and disposition of equipment. Technology will assess equipment and forward forms to Purchasing to arrange pickup.

### **Requests for Surplus Furniture/Equipment**

Furniture and equipment (other than electronic equipment) that is in safe and usable condition is held in warehouse until it is needed elsewhere within the district. The process for acquiring surplus furniture is as follows:

- 1) Identify the furniture or equipment that is needed.
- 2) Submit a Surplus Item Request form (see 6g) to Purchasing.
- 3) Requests will be filled on a first-come, first-served basis and all requests are subject to availability.
- 4) Furniture/Equipment that is available will be brought to the site as soon as possible. If furniture/equipment will replace existing items, the site shall follow the submission for surplus procedures for those items. Site will be notified if the requested items are not available.

## FORMS INDEX

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Please use current forms, (examples attached) dispose of outdated forms. Current forms can also be accessed from the Forms tab of the Purchasing section on the District website.

Warehouse Requisition/Transfer Request\_\_\_\_\_6a

Shipment Form (for outgoing packages)\_\_\_\_\_6b

Merchandise Return to Vendor\_\_\_\_\_6c

District Credit Card Purchase Requisition\_\_\_\_\_6d

Furniture & Equipment Surplus Disposal\_\_\_\_\_6e

E-Waste Surplus Disposal\_\_\_\_\_6f

Surplus Item Request\_\_\_\_\_6g

Donation Transmittal\_\_\_\_\_6h





## WAREHOUSE REQUISITION/TRANSFER REQUEST

Originator: \_\_\_\_\_ Site: \_\_\_\_\_

☐ **WAREHOUSE REQUISITION** – Account# \_\_\_\_\_

**Scheduled Submission Date** - \_\_\_\_\_

☐ **ITEM PICK UP/TRANSFER** – Please use Merchandise Return to Vendor form for all PO returns

Item #	Item Description <i>No backorders on warehouse requisitions – Please Reorder</i>	Qty Ord.	Unit Price	Qty Del.	Total
10159	White Copy Paper, 8.5" x 11", Case				
S-549LA	GR Riso Masters, 2/box				
S-539U	GR Riso Ink, Black, 2/box				
S-3192	RN Riso Masters, 2/box				
S-4206	RN Riso Ink, Black, 2/box				
S-4250	Z Riso Masters, 2/box				
S-7605	Z Riso Ink, Black, 2/box				
S-6977UA	F Riso Masters, Black, 2/box				
S-6930U	F Riso Ink, 2/box				
3000004	GBC Laminating Film - 25" x 500'				
Other					
	CA Sales Tax		7.25%		
	<b>TOTAL</b>				

Qty	Transfer Item Description	Pick Up Location <input type="checkbox"/> Front Office <input type="checkbox"/> Library	Deliver to <input type="checkbox"/> Front Office <input type="checkbox"/> Library

**Administrator Approval:** \_\_\_\_\_

Date: \_\_\_\_\_

Released by: \_\_\_\_\_

Date: \_\_\_\_\_

Picked Up/Delivered by: \_\_\_\_\_

Date: \_\_\_\_\_

Received by: \_\_\_\_\_

Date: \_\_\_\_\_

White: Purchasing

Canary: Originator after delivery

RCSD44 Rev 7/17  
Printed 8/10

# SHIPMENT FORM

## For Outgoing Packages

*(Use Merchandise Return to Vendor Form for product returns)*

**SCAN or FAX FORM TO 916-771-1611 PRIOR TO PICK UP**

**Site:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Site Contact:** \_\_\_\_\_  
*(Person responsible for completing this form)*

**Recipient:** \_\_\_\_\_ **PO #** \_\_\_\_\_

**Recipient Contact:** \_\_\_\_\_

**Recipient Address:** \_\_\_\_\_

**Date for Desired Pick-Up by Warehouse** \_\_\_\_\_ (MM/DD/YY)

**Location for pick-up:** Office ☐ Library ☐ (Items must be boxed and taped with packing tape)

QTY PKG	ITEM DESCRIPTION	COST/ VALUE

### SPECIAL INSTRUCTIONS FOR SHIPMENT:

**Account to be charged for shipping fees:**

*(must be completed to process shipment)*

**Received From:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Picked Up by:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Return Information** *(to be completed by Purchasing)*

<b>Shipper:</b>	<b>Date Picked Up:</b>
	<b>Shipping Charge:</b>

# MERCHANDISE RETURN TO VENDOR

**For *Returning* Product to Vendors**

*(Use Shipment Form for all other shipments)*

**SCAN or FAX FORM TO 916-771-1611 PRIOR TO PICK UP**

**Site:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Site Contact:** \_\_\_\_\_

*(Person responsible for completing this return)*

**Vendor:** \_\_\_\_\_ **PO #** \_\_\_\_\_

**Vendor Contacted? Y/N** \_\_\_\_\_ **RMA# (Return Merch. Auth.)** \_\_\_\_\_

**Vendor Contact Name** \_\_\_\_\_

**Return Address:** \_\_\_\_\_

**Date for *Desired* Pick-Up by Warehouse** \_\_\_\_\_ **(MM/DD/YY)**

**Location for pick-up: Office** \_ **Library** \_ *(Items must be boxed and taped with packing tape)*

QTY	ITEM NUMBER	ITEM DESCRIPTION	COST/ VALUE

**REASON FOR RETURN:**

**Account to be charged for shipping/restock fees:**

*(must be completed to process shipment)*

**Account Code (account to be credited):**

*(must be completed for proper credit)*

**Received From:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Picked Up by:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Return Information** *(to be completed by Purchasing)*

<b>Shipper:</b>	<b>Date Picked Up:</b>
<b>Shipping Instructions</b>	<b>Restock Fee:</b>
	<b>Shipping Charge:</b>

## District Credit Card Purchase Requisition

Vendor

Address/Phone/Fax

Order Website

Catalog number	Quantity Ordered	Unit of Measure	Item Description	Unit Price	Extended Amount
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
Subtotal					\$ -
CA Sales Tax (7.25%)					\$ -
Shipping/Handling Charges					
Total					\$ -
Requested by:				Date:	
Account #:				Site:	

# FURNITURE & EQUIPMENT SURPLUS DISPOSAL FORM

**\*\*Please submit to Purchasing Department\*\***

SCHOOL SITE: \_\_\_\_\_ DATE: \_\_\_\_\_

CENTRAL LOCATION ON SITE FOR PICKUP: \_\_\_\_\_  
(NOT outside or in electrical or technology closet)

NAME OF PERSON COMPLETING FORM: \_\_\_\_\_

APPROVED BY: (Administrator) \_\_\_\_\_

Qty	Description/Color	Manufacturer/Brand	Model #	RCSD #	Serial #

Reason for Removal:      Obsolete \_\_\_\_\_      No Longer Needed \_\_\_\_\_

Condition:    Broken/No Value (Will be discarded, disposal fees may apply) \_\_\_\_\_  
                   Operable/Some Value \_\_\_\_\_  
                   Works/Good Condition \_\_\_\_\_

Account Code: (Disposal Charges) \_\_\_\_\_

DISPOSITION OF ITEM: (Purchasing Department Use Only)

Date	Transfer to another site (Requires request from site acquiring item and notification of Maintenance or warehouse for delivery instructions)		Transfer to Surplus - District Use	Transfer to Surplus- Outside of District use**	Discard **	** Board Approval/ Date
Signature		New Site: _____				

REMOVAL INSTRUCTIONS: (Warehouse/Maintenance Use Only)

Date	Picked up by: Maintenance      Warehouse		Deliver to:	Delivered Signature	Received Signature

# E-WASTE SURPLUS DISPOSAL FORM

**\*\*Please submit to Technology Department\*\***

SCHOOL SITE: \_\_\_\_\_ DATE: \_\_\_\_\_

CENTRAL LOCATION ON SITE FOR PICKUP: \_\_\_\_\_

NAME OF PERSON COMPLETING FORM: \_\_\_\_\_

APPROVED BY: (Administrator) \_\_\_\_\_

Technology Use Only

Qty	Description	Manufacturer/Brand	RCSD #	Serial #	Kept by Technology/ Quantity

Reason for Removal:      Obsolete \_\_\_\_\_      No Longer Needed \_\_\_\_\_

Condition:      Broken/No Value (Will be discarded, disposal fees may apply) \_\_\_\_\_

                 Operable/Some Value \_\_\_\_\_

                 Works/Good Condition \_\_\_\_\_

Account Code: (Disposal Charges) \_\_\_\_\_

## DISPOSITION OF ITEM: (Technology/Purchasing Department Use Only)

Date	Transfer to another site (Requires request from site acquiring item and notification of Maintenance or warehouse for delivery instructions)	Transfer to Surplus - District Use	Transfer to Surplus- Outside of District use**	Discard **	** Board Approval/ Date
Signature	New Site: _____				

## REMOVAL INSTRUCTIONS: (Warehouse/Maintenance Use Only)

Date	Picked up by: Maintenance Warehouse	Deliver to:	Delivered Signature	Received Signature

E-Waste Disposal Form – 12/16

-Technology Use Only-: Date Received: Ticket #

Initial:

Date Sent to Purchasing:

# SURPLUS ITEM REQUEST

Person Requesting Item \_\_\_\_\_ Date \_\_\_\_\_

Administrator's Authorization \_\_\_\_\_

Delivery Site \_\_\_\_\_ Location (rm. #, etc.) \_\_\_\_\_

Item Requested:

Quantity	Item Description	Color

Alternate Request:

Quantity	Item Description	Color

**\*\*\*ALL REQUESTS SUBJECT TO AVAILABILITY\*\*\***

Delivered by: \_\_\_\_\_ Date: \_\_\_\_\_

Acknowledge Receipt: \_\_\_\_\_ Date: \_\_\_\_\_

## Typical items in surplus:

Student desks (specify lift lid or front load and color of top)

Student chairs (specify color, size – 12", 14", 16" 18" - and style)

Teacher desks (specify style, color, size)

File cabinets (specify color preference, # of drawers, lateral or vertical – letter size only available)

Bookcases (specify size - H x W - and color preference)

Activity tables – Kidney Shaped, Trapezoid, Rectangle - (specify color preference, shape and size)

**\*\*Other items *may* be available - specify precisely the needs of the site.**

Preferences for color and style will be fulfilled if available, but cannot be guaranteed.

Purchasing will notify site if unable to fulfill requests.\*\*

++Please remember that surplus furniture is *used* furniture++

*It will be safe and functional.*

*Roseville City School District*  
**DONATION TRANSMITTAL**

**DATE RECEIVED:** \_\_\_\_\_ **RECEIVED BY:** \_\_\_\_\_  
Print Name & School

**ITEM DESCRIPTION** (Include brand, model number, color, quantity, etc.)

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**DONATED BY:** \_\_\_\_\_  
*(Name & Address of Donor/Group)*  
*Include name of Contact Person* \_\_\_\_\_

\_\_\_\_\_

**TO:** *(Site/Department/Room No., etc.)* \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

RCSD# \_\_\_\_\_ has been labeled on the front of the equipment.

Date Labeled: \_\_\_\_\_ By: \_\_\_\_\_

Please provide serial # *(if equipment)* \_\_\_\_\_

*To Be Completed by Business Services*

Date thank you letter sent: \_\_\_\_\_

Date of Board acceptance: \_\_\_\_\_