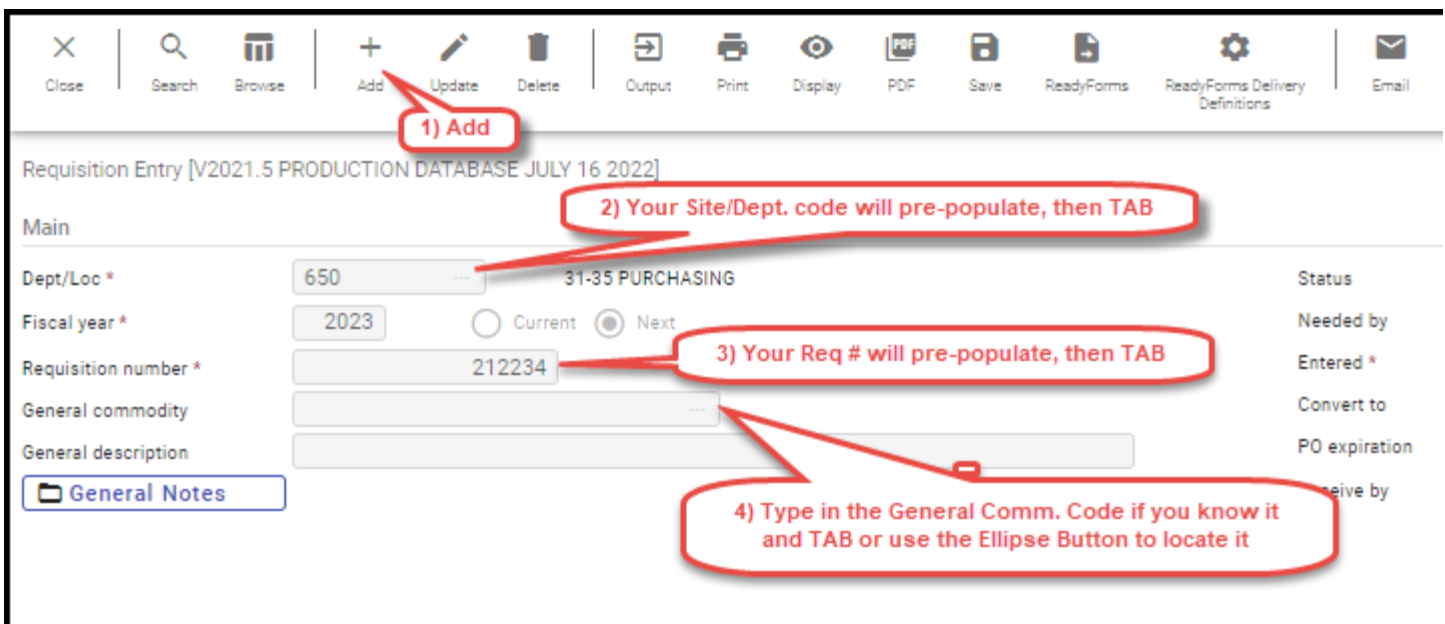
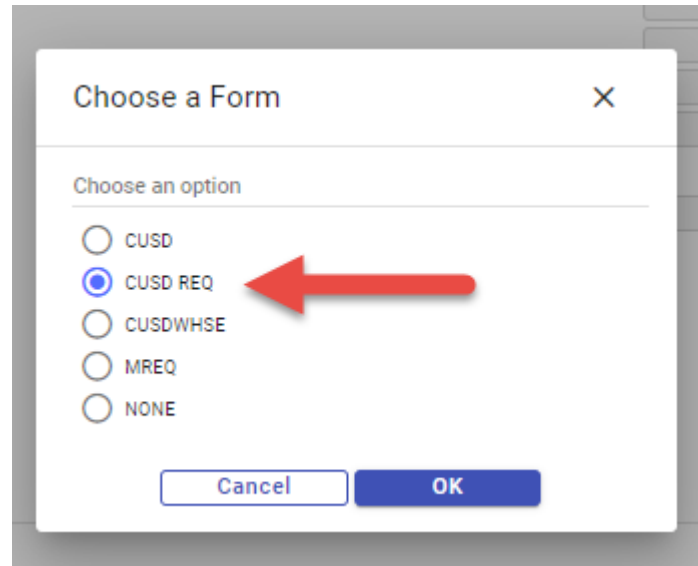


## Requisition Entry: Purchase Request



Select CUSD Req under Switch Form



# Munis 2021.5 Training Manual

## Requisition Entry: Purchase Request

← | ✓ | ✕ | ↗ | 🖨️ | 👁️ | 📄 | 💾 | ⬇️ | 📄

Back | Accept | Cancel | Output | Print | Display | PDF | Save | Excel | Word

**6) Accept**

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Commodity Help

Commodity	Description
4231989	
442	APPLIANCE (KITCHEN/WASHER/DRYER)
106	ARTS & CRAFTS
306	ARTS & CRAFTS
103	ATHLETICS
303	ATHLETICS

**5) If you used the Ellipse Button this screen will appear. Highlight the appropriate one.**

✕ | ✓ | ✕

Close | Accept | Cancel

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > ✎

Main

Dept/Loc \* 650 31-35 PURCHASING

Fiscal year \* 2023  Current  Next

Requisition number \* 212234

General commodity 103 ATHLETICS

General description ATHLETICS

**7) TAB and General Description will pre-populate**

Status 2 Created

Needed by

Entered \* 08/23/2022 By TracyOgle

Convert to Purchase Order

PO expiration 06/30/2023

Receive by  Quantity  Amount

Three way match required

Inspection required By

Project accounts applied

Vendor

Vendor 0  Committed

Name

**8) Leave Blank. Use if a RUSH order, enter the date you need to receive it by.**

**9) Check Three Way Match**

**10) Can type in Vendor ID if you know it and TAB, or use the Ellipse Button to locate vendor.**

## Requisition Entry: Purchase Request

← | ✓ | ✕  
Back | Accept | Cancel

**12) Accept**

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Vendor Help > 🔍

Vendor Alpha:

Vendor Name:

**11) If you used the Ellipse Button this screen will appear. Using all UPPER CASE type in the first few letters of vendor's name followed by an asterisk.**

← | ✓ | ✕ | ↶ | 🖨️ | 👁️ | 📄 | 💾 | ⬇️ | 📄  
Back | Accept | Cancel | Output | Print | Display | PDF | Save | Excel | Word

**14) Accept**

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Vendors

**13) Highlight appropriate vendor. Always select the one with the Address #0**

Vendor	Address #	Alpha Sort	Vendor Name	Address 1
44589	0	FIRST STRING SPORTS	FIRST STRING SPORTS	6616 N BLACKSTONE AVE
44589	1	FIRST STRING SPORTS	FIRST STRING SPORTS	6616 N BLACKSTONE AVE
112012	0	FIRST STUDENT INC	FIRST STUDENT INC	24179 NETWORK PLACE
112012	1	FIRST STUDENT INC	FIRST STUDENT INC	24179 NETWORK PLACE
353619	0	FIRST STAGE PUBLISHI	FIRST STAGE PUBLISHING COMPANY	8614 GRAVENSTEIN WAY
356586	0	FIRST STEP GREENHOUS	FIRST STEP GREENHOUSES	43315 CALLE ROCINANTE

## Requisition Entry: Purchase Request

Vendor

Vendor: 44589  Committed

Name: FIRST STRING SPORTS

Print  Fax  E-Mail

Address: 6616 N BLACKSTONE AVE  
FRESNO CA 93710

Shipping and Billing

Ship to: WW

Address: CENTRAL WAREHOUSE  
1690 DAVID E. COOK WAY  
RECEIVING HOURS: 7:30 - 3:00  
CLOVIS CA 93611

Email: x79482

Reference: PURCHASING/MALONE/OGLE

Vendor/Sourcing Notes

Vendor Quotes (0)

15) The Vendor information populates

16) All deliveries go thru the warehouse. Leave WW as the default.

17) Enter your phone extension

19) Use if you need to provide specific instructions to vendor or Purchasing. Commonly used: AC for attachment, PP for Prepay, RS for rush, etc.

18) Enter site/persons name you are ordering for and your name

Back | Accept | Cancel | **P** Print On PO | **I** Import

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 1, 2022] > Vendor Sourcing Notes >

Note

Requisition: 2023 212234

Date/Time: 2022-08-24 09:53  Print on PO

Created By: TracyOgle

20) Skip to Step 25 if you didn't use Vendor Sourcing Notes. To add a Vendor Sourcing Note click on Import

## Requisition Entry: Purchase Request

22) Accept

21) This screen will appear, highlight appropriate one

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Vendor Sourcing Notes > Requisition Notes

Type	Number	Dated	By User	Description
Normal	1	04/26/2011	LeeannErrotabere	CM *** COMPLETE ORDER ***
Normal	2	04/26/2011	LeeannErrotabere	CO *** CONFIRMING ORDER ***
Normal	3	04/26/2011	LeeannErrotabere	FX *** ORIGINAL COPY OF PURCHASE ORDER
Normal	4	04/26/2011	LeeannErrotabere	AC ** PLEASE REFER TO ATTACHMENT(S) FOR
Normal	5	04/26/2011	LeeannErrotabere	PP *** PREPAY *** --
Normal	6	04/26/2011	LeeannErrotabere	RS *** RUSH ***

## Requisition Entry: Purchase Request

← Back | + Add | Update | Delete | P Print On PO | I Import

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Vendor Sourcing Notes

Note

24) Will return you to Main Entry Screen.

Requisition: 2023 212234

Date/Time: 2022-08-24 10:02  Print on PO.

Created By: TracyOgle

AC \*\* PLEASE REFER TO ATTACHMENT(S) FOR ADDITIONAL INFORMATION

23) This box will appear. Multiple Vendor Sourcing Notes can be added by repeating steps 20-22 for each.

Close | Search | Browse | + Add | Update | Delete | Output | Print | Display | PDF | Save | ReadyForms | ReadyForms Delivery Definitions | Email | Schedule | Attach | Switch Form | L Line Items | R Release | A Activate

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022]

25) Select Line Items to go to the Line Detail Screen

Main

Dept/Loc *	650 31-35 PURCHASING	Status	2 Created
Fiscal year *	2023 <input type="radio"/> Current <input checked="" type="radio"/> Next	Needed by	
Requisition number *	212234	Entered *	08/23/2022 By TracyOgle
General commodity		Convert to	Purchase Order
General description		PO expiration	06/30/2023
<input type="checkbox"/> General Notes		Receive by	<input checked="" type="radio"/> Quantity <input type="radio"/> Amount
			<input checked="" type="checkbox"/> Three way match required
			<input type="checkbox"/> Inspection required By
			<input checked="" type="checkbox"/> Project accounts applied

## Requisition Entry: Purchase Request

← Accept Cancel Search Delete Copy GL Acct browse\_pl\_gl\_budget\_groupings

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items > /

Requisition

Fiscal year 2023 Number 212234 Line 1

Contract

Detail

Quantity \* 5.00 **26) Enter Quantity**

Commodity

Inventory item

Location

Type  Pick ticket  Purchase

Product ID

Description \* ITEM #12345, EZ UP CANOPY, SIZE 10' X 10' COLOR: ROYAL BLUE **27) Enter complete description-be specific with item #'s, size and color choice**

Miscellaneous

Capital Asset N

Unit price 55.00000 **28) Enter Unit Price**

UOM \* EA **29) Enter Unit of Measure, EACH, PK, SET. Can use the Ellipse Button to locate UOM, highlight and Accept.**

Gross 275.00

Freight .00

Discount .00 %

Taxable 275.00 **30) Tax will calculate at our tax rate. Never remove the tax even if vendor says they don't charge tax. We must pay it to the State of CA.**

Sales tax 21.93

Credit .00

TOTAL 296.93

Amount justification: UNKNOWN **32) Verify these two totals match.**

**31) Enter the appropriate General Ledger Account and TAB or use the Ellipse Button to locate your site's available budgets, highlight appropriate one and Accept.**

Seq PA Type Project Account T Description Amount PA BUD GL Bud

01 Expense 430008-650-0000-0650-7530-0000-0-60001- -01 296.93

← Search Browse + Update Delete Copy Mass Allocate

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items

Requisition

Fiscal year 2023 Num 212234 Line 1

Contract

**34) Select Add to add another line item and follow previous steps or skip to step 40**

Detail

# Munis 2021.5 Training Manual

## Requisition Entry: Purchase Request

Back Accept Cancel Search Delete Copy GL Acct browse\_gl\_gl\_budget\_groupings

37) Accept

36) Click on Copy GL Acct. Your account will self-populate. TAB to the Amount Field.

38) When done with line items entry, Back

35) Since your GL Account is entered on Line #1, you can Copy GL Acct if you choose for additional lines.

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022] > Line Items > /

Requisition

Fiscal year 2023 Number 212234 Line 2

Contract

Detail

Quantity \* 3.00 Unit price 6.50000

Commodity UOM \* EA

Inventory item

Location

Type  Pick ticket  Purchase

Product ID

Description \* #44322 FOOTBALL JERSEY, SIZE MEDIUM, COLOR RED.

Add'l Desc/Notes

Gross 19.50

Freight .00

Discount .00 %

Taxable 19.50

Sales tax 1.56

Credit .00

TOTAL 21.06

Amount justification: UNKNOWN

Miscellaneous

Capital Asset N

Seq	PA Type	Project Account	T	Account	Description	Amount	PA BUD	GL Bud
01				Expense		21.06		

Close Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email Schedule Attach Switch Form Line Items Release Activate Mass Allocate Allocate

Requisition Entry [V2021.5 PRODUCTION DATABASE JULY 16 2022]

Main

39) Status must be a 4 Allocated to Release

40) When order is complete select Release

Dept/Loc \* 650 31-35 PURCHASING

Fiscal year \* 2023  Current  Next

Requisition number \* 212234

General commodity

General description ITEM #12345, EZ CANOPY, SIZE 10' X 10', COLOR: ROY

General Notes

Status 4 Allocated

Needed by

Entered \* 08/23/2022 By TracyOgle

Convert to Purchase Order

PO expiration 06/30/2023

Receive by  Quantity  Amount

Three way match required

Inspection required By

Project accounts applied

Vendor

Vendor 44589  Committed

Name FIRST STRING SPORTS

Print  Fax  E-Mail

Shipping and Billing

Ship to \* WW

Address CENT

1690