



DATA ENTRY page 1 of 3

Data Entry

- * Requisition Entry
- * Requisition Status

Requisition Entry:

SU Softwaren School accounting system	are Web Li	ink			Home Data Entry E	mployee Information	Settings	Help
Requisition Entry								
Approval Tree ID	DISTRICT	ρ	UNKNOWN VENDOR FOR REQUISITION Sales Tax ID:	Your Comment				
Requisition Number		A	Last Check Date:					
Vendor ID	UNKNOWN	ρ	W9 Sent Date: W9 Received Date:	Comments	User Name	Date Updated		
Requisition Amount		# E	Customer ID:	No records to display.	<u> La companya da managan da manag</u>	end Total		
Requisition Date								
Expected Date								
Requisition Description								
Ship To Address ID		ρ						
Employee ID	QUANGCIND	ρ						
Cancelled								

PART I - HEADER INFORMATION

APPROVAL TREE ID: Supervisor approving your requisition. Click on the proval trees.

REQUISITION NUMBER: Leave Blank – A number will be assigned at the end of the requisition process

VENDOR ID: Vendor name for your order. Click on the (magnifying glass) a list of vendors the school has established and used in the past. Use <u>UNKNOWN</u> if there is a new vendor not in the system (Leave notes in the Comment Box for business manager to establish the new vendor or if you have not decided which vendor to use)

REQUSITION AMOUNT: The grand total amount of the order for that specific vendor.

REQUISTION DATE: Today's date

EXPECTED DATE: Today's date. <u>However, for summer order please input 07/01/20XX for next school years budget</u>

REQUISTION DESCRIPTION: Brief description of the order. EX: SUPPLIES, EQUIPMENT, CURRICULUM, REGISTRATION, FEE or etc.

SHIP TO ADDRESS ID: Select the building location. Click on the location. For summer orders, the shipping will default to the DISTRICT office. Go ahead and still select your building location.

EMPLOYEE ID: Prefilled to employee's ID

YOUR COMMENT: This is important to use when you leave notes for administrators or business manager to establish a new vendor. <u>For extracurricular activities</u>, please input which activities the order is for (EX. Volleyball, Drama, Speech, NHS.....etc).

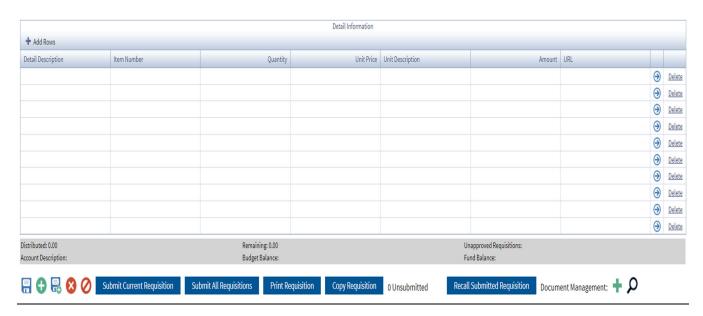




DATA ENTRY page 2 of 3

IMPORTANT STEP: SAVE – Click the Disk 🖶 at the bottom left corner.

Make sure you save your requisition often to avoid losing information. Weblink will time out after 10 minutes of inactivity. Information will be lost if not saved.



PART II - REQUISITION INFORMATION

DETAIL DESCRIPTION: Description of the item you are purchasing. Be as descriptive as possible this will help the business office check in items. (EX. EXPO Dry Erase Marker, Chisel Point, Assorted Color – 36 pk)

ITEM NUMBER: Input this information if given. This will help the vendor know what you are purchasing.

QUANTITY: Quantity of item

UNIT PRICE: Price of item

UNIT DESCRIPTION: This will depend on the detailed description. Are the items sold by the Dozen, Each, Box, Pack, Oz, lb...etc) or Can be left blank if you do not know.

AMOUNT: Total Cost of Item (Quantity times Unit Price for each line)

URL: Optional, but very helpful if staff can provide this information. Amazon order is a prime example a URL link is useful. Input the URL link for each item.

RECOMMEND SAVING: SAVE – Click the Disk at the bottom left corner to avoid losing any data entry.





DATA ENTRY page 3 of 3

Click Document Management: (bottom right corner of the screen). You can add any documentation to requisitions. Recommend adding documentation if you received a quote or email correspondence on any order.

SAVE AGAIN to make sure you will not lose any data. To SAVE – Click the Disk at the bottom left corner

"Print Requisition" to save for your record — optional. At the bottom, you will see

[Must print the requisition before you submit the order]

FINAL STEP: Submit Current/All Requisition



Helpful hint your order has been submitted. You will have "O Unsubmitted"

Requisition Status:

The staff member that inputs into the requisition system will be able to see the approval status process.

