


DATA ENTRY page 1 of 3

Data Entry


- * Requisition Entry
- * Requisition Status

Requisition Entry:

PART I - HEADER INFORMATION

APPROVAL TREE ID: Supervisor approving your requisition. Click on the  (magnifying glass) for approval 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 UNKNOWN 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)

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

REQUISITION DATE: Today's date

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


REQUISITION 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  (magnifying glass) for building 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. For extracurricular activities, please input which activities the order is for (EX. Volleyball, Drama, Speech, NHS.....etc).

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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.

| Detail Information | | | | | | | |
|--------------------|-------------|----------|------------|------------------|--------|-----|--|
| + Add Rows | | | | | | | |
| Detail Description | Item Number | Quantity | Unit Price | Unit Description | Amount | URL | |
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Distributed: 0.00 Remaining: 0.00 Unapproved Requisitions:
 Account Description: Budget Balance: Fund Balance:


 Submit Current Requisition Submit All Requisitions Print Requisition Copy Requisition 0 Unsubmitted Recall Submitted Requisition Document Management:  

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.

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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 “0 Unsubmitted”





Requisition Status:

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

SU software unlimited school accounting system **Web Link**

Home **Data Entry** Employee Information Settings Help

Requisition Status

| Requisitions | | | | | | | | | | | |
|--------------------|------------|-------------------------|-------------|------------------|--------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|-----------------------|---|
| Requisition Number | Vendor ID | Vendor Name | Employee ID | Requisition Date | Amount | Approved | Rejected | Submitted | Cancelled | Purchase Order Number | Document Management |
| DST-0039 | AMAZON | AMAZON CAPITAL SERVICES | QUANGCIND | 04/19/2023 | 31.72 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |   |
| DST-0040 | STAPLESADV | STAPLES ADVANTAGE | QUANGCIND | 04/19/2023 | 45.52 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |   |

| Approvals | | | | | | |
|-------------------------------------|--------------------------|------------------|------------------|-----------|----------|-------------|
| Approved | Rejected | Actual | Primary | Alternate | Sequence | Result Date |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | CINDY QUANG | CINDY QUANG | | 1 | 04/19/2023 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | MELISSA POLONCIC | MELISSA POLONCIC | | 2 | 04/19/2023 |

| Comments | | |
|------------------------|-----------|--------------|
| Comments | User Name | Date Updated |
| No records to display. | | |