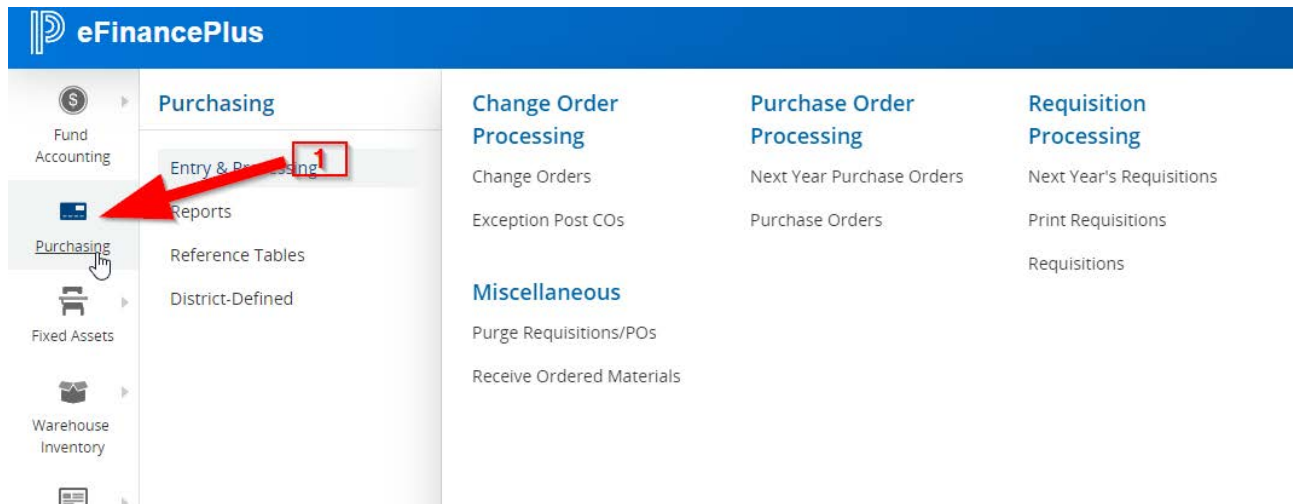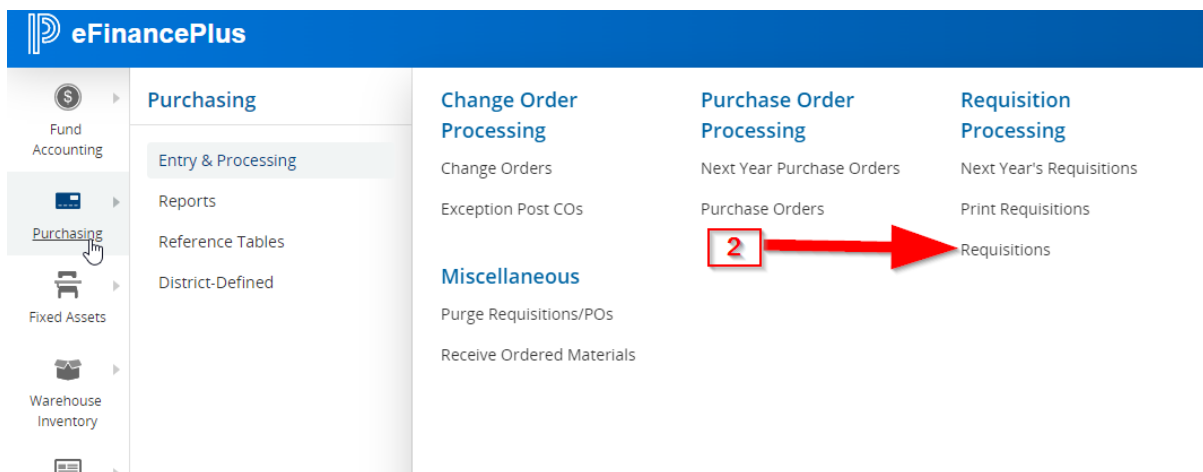# HOW TO ENTER A REQUISITION

On the Home screen in eFinancePlus choose Requisitions from your My Favorites Panel or navigate the menu as follows:

1. Click on **Purchasing**

2. Click on **Requisitions**

*Once on this screen, click on the ⭐ icon in top menu to add to favorites.

3. Click on the ⊕ *Add new* icon to start a new requisition.

Requisition Listing - CON2011_Live

Copy   Print Requisiti...   Budget Transfers   Budget Adjustments   Set Period

Date: 06/30/2022 Period: 10/22

Search Criteria

Year	2022 ▾	Recommended Vendor	
Requisition		Ship To	
Buyer		DEPARTMENT	
Date Requested	📅	Attention	
Date Required	📅	Status	

Search   **Advanced Search**

4. The Header screen will appear with a new Requisition number assigned

5. Click on the drop-down menu and choose your School/ Department code. Choose your department code with a B or F at the end (ex. 001B) if you are using Bilingual or Federal Funds. Choose T if purchasing Technology items or TRAV if travel.

New Requisition Information - CON2011_Live

Add Item   Purchase Order Detail

Date: 06/30/2022   Period: 10/22

Header   Line Items

General Information

Requisition *	729515
DEPARTMENT *	▾
Requested	001 - CONROE HIGH SCHOOL
Required	001A - CONROE HIGH ATHLETICS
Vendor	001AT - CONROE HIGH ATHLETICS - TECH
Vendor Address	001B - CONROE HIGH SCHOOL - BILINGUAL
	001BT - CONROE HIGH SCHOOL - BIL TECH

6. Enter the vendor number and tab to next field.

7. The vendor name and address will populate. Confirm that it is the correct vendor.

Header   Line Items

General Information

Requisition *	729515
DEPARTMENT *	001 - CONROE HIGH SCHOOL
Requested	06/30/2022
Required	
Vendor	41001318 **6**
Vendor Address	DANIEL OFFICE PRODUCTS
	PO BOX 630729
7	
	HOUSTON TX 77263-0729

8. If you do not know the vendor number, you can click on the vendor search icon.

Header   Line Items

General Information

Requisition *	729515
DEPARTMENT *	001 - CONROE HIGH SCHOOL
Requested	06/30/2022
Required	
Vendor	**8**
Vendor Address	

9. This will pull up a new screen. Enter the Vendor Name with an * before and or after the search criteria. The * tells the database to search everything with that criteria.

10. Click Search.

Search Criteria

Vendor Code		Employee ■
Inactive Status	N - Active ▾	
Vendor Name	*DANIEL OFFI*	
Search Name		
Address Line 1		
Address Line 2		
City		
Zip Code		
Phone		Fax
Contact		

Search   **Advanced Search**

11. The database will show a list of vendors that match the search criteria. Highlight the correct vendor and double click on it   . It will populate the Vendor information back in the requisition screen.

Search Criteria

Vendor Code		Employee ■
Inactive Status	N - Active ▾	
Vendor Name	*DANIEL OFFI*	
Search Name		
Address Line 1		
Address Line 2		
City		State
Zip Code		
Phone		Fax
Contact		

Search   Advanced Search

Code	▲ Vendor Name	Vendor Address	City	State	Zip
00000918	DANIEL OFFICE PRODU **DO NOT USE* USE #41001318		USE #41001318	TX	
41001318	DANIEL OFFICE PRODUCTS	PO BOX 630729	HOUSTON	TX	77263

12. Click on the ***Add Attachment?*** Box if you will be adding an attachment to the requisition. <u>Once you **complete and save** the requisition, the add attachment pop-up screen will appear</u>. Instructions for this will be at the end.

13. The ***Comments*** box is for the <u>Bid reference</u>. The bid reference lists how the vendor is awarded. It is a CISD bid#, cooperative name such as EPIC6, Buyboard, etc. This information can be found on the CISD Awarded Vendor List. If not an awarded item, comments line should read Mileage, Travel Approval, Travel PO#, Specialty item. <u>*Do not enter vendor quote # in this field.</u>

14. ***Buyer*** – enter the full name of the person entering the requisition.

15. ***Attention*** – State who the warehouse will deliver the items to. Ex. Sue Smith/ RM 101. Or who the item is for if not warehouse.

16. ***Ship To*** – Click on the drop-down menu and choose the correct ship to location.

17. Once you have completed all fields in the ***Header Tab***, click on the ***Line Items Tab*** to continue OR tab through.

18. The ***Line Item Tab*** is where you will enter the ***Detail Information*** and the ***Pricing/ Budget***. The tab tells you how many line items are in the requisition ex. (1 of 1). The line item you are currently on is always listed in the box to the right of the requisition number.

19. ***Commodity*** – enter the 6-digit commodity code with the dash. **Ex. 750-001**.

20. ***Description*** - When you enter the commodity this field <u>auto-fills</u> with the commodity description. **<u>Delete this information</u>** and enter the description of the item. When entering a description list the MFG/Model # first, then the description. The description has to tell us "what is it?" The description should match the quote. Ex: HP2069 – microphone cable.

*Do not tab down to the next line in the comments field. Type in data field and let the system wrap the text. The main description should show on the 1st 2 lines of the text box.

21. Enter the ***Measure*** (ea., bx, st), the ***Quantity***, and ***Unit Price*** (price for 1). The system will fill in the extended Amount as you tab through these fields.

22. Enter the Budget Unit and Account code.

Click on the ✓ icon to finish the line and move to the next line. Repeat #22-25 for each additional line. The budget unit and account code will pre-fill with the budget you entered for line 1. You can change it if needed.

DO NOT USE THE TRADE/DISCOUNT BOX- If a discount needs to be applied you will need to apply towards the item/items the discounted amount and you will state the discount has been applied in the notes section of the requisition.

NEW DO NOT COMBINE FEDERAL AND GENERAL FUNDS ON A REQUISITION: You must create two separate reqs if you are using both Federal and General funds due to approval routing.

NEW: Don't forget to enter a line for ***Shipping Charges***. Check the ☑ Shipping Charge box in the Line Item Detail Information Tab and the system will automatically fill in line 99, ESTIMATED SHIPPING/ HANDLING in the ***Description****field and tab you to the ***Shipping*** field under Pricing. Enter the shipping cost and tab through the fields to the Budget Unit.

*If you do not click on ✓ when you complete the line and instead click the ← icon, the line will not be saved.

23. When you have entered all the lines click the ← button to return to the header.

* Only click the back button **once** or you will back completely out of the requisition and lose your data.

24. You are now back in the **Header Tab**. Click on the blue ✐ icon to go to the **Notes** field.

New Requisition Information - CON2011_Live

Add Item   Purchase Order Detail

⊕ 🗑 🖨 | ✓ ← | ☰ | ⬚ ✐ | |◁ ◁ ▷ ▷| | 🖫 🖭 | ⊗

Date: 06/30/2022 Period: 10/22   [24]

Header   Line Item (1 of 1)

General Information

Requisition *	729515		Add Attachment?	☐
DEPARTMENT *	001 - CONROE HIGH SCHOOL ▾		Open	☐
Requested	06/30/2022 📅		Comments	
Required	📅			
Vendor	🔍		Buyer	
Vendor Address			Attention	
			Ship To *	001 - CONROE HIGH SCHOOL
				3200 WEST DAVIS
				CONROE TX 77304

Enable Full Account View

25. The **NOTES** window will appear. Click on the ✓ icon to open the text field.

26. Type the required information. This field is for any information the vendor will need. Enter the vendor quote number, vendor delivery information, etc. *The warehouse does not see the Notes. Do not enter warehouse delivery instructions here.
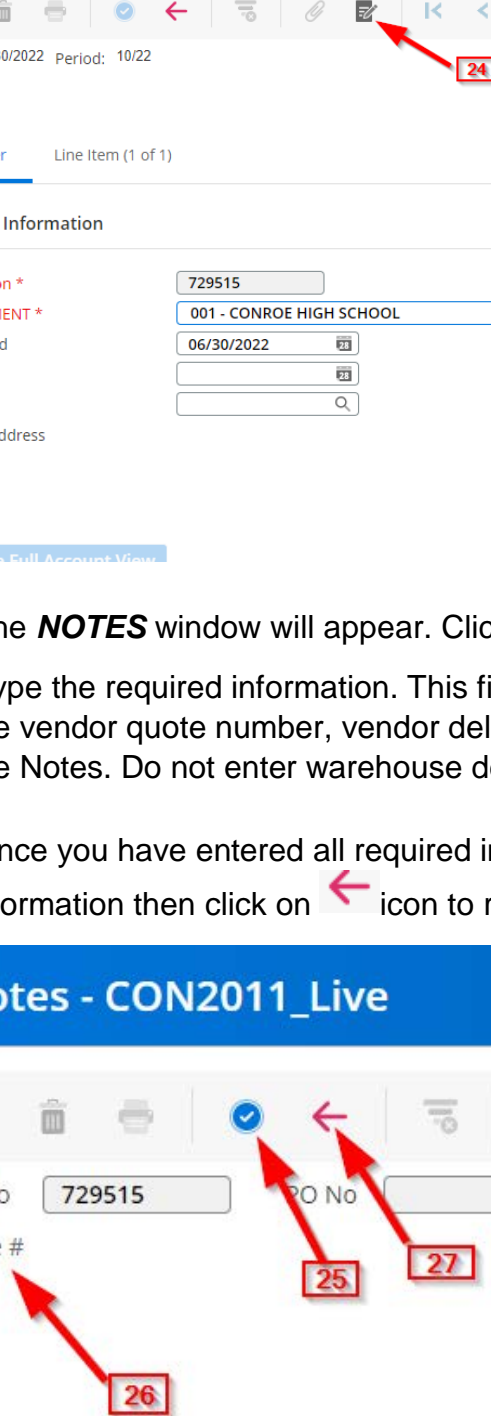
27. Once you have entered all required information click on the ✓ icon to "save" the information then click on ← icon to return to the requisition entry screen.
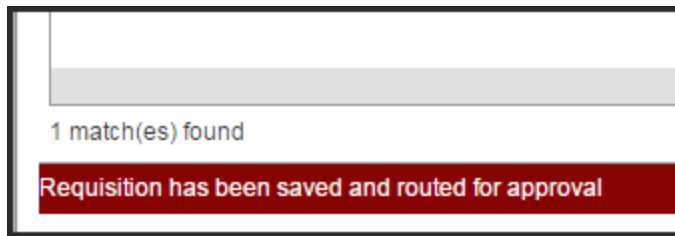
Notes - CON2011_Live

⊕ 🗑 🖨 | ✓ ← | ☰ | 🖇 ✐ | ⊗

| Req No | 729515 | PO No | | Change No | |

Quote #

[25]   [27]

[26]

Once your requisition is complete, click on the ![save icon] icon to **SAVE** the requisition.

You will get the following message at the bottom of the requisition screen.

1 match(es) found

Requisition has been saved and routed for approval

You can also use the **SAVE IN PROGRESS** icon ![icon] to save a requisition that is partially complete so that you can continue your requisition entry at a later time. You will see IN PROGRESS right below the menu. In the requisition listing screen the Status will show **IN PROGRESS**.

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	DEPARTMENT	Amount	Status
287343	09/21/2016	2016	00000918	DANIEL OFFICE PRODUCTS	LAURIE ENOCKSEN	001	100.00	
287344	09/21/2016	2016				001	71.00	In Progress
287345	09/21/2016	2016	00000918	DANIEL OFFICE PRODUCTS		001	0.00	In Progress

*NOTE: The requisition will not be saved and routed for approval until you SAVE the requisition as shown above.

Don't forget to **ADD YOUR ATTACHMENTS**! Click on ![attachment icon].
See How To Add Attachments instructions.
*Save all documents as a pdf before you add as an attachment.