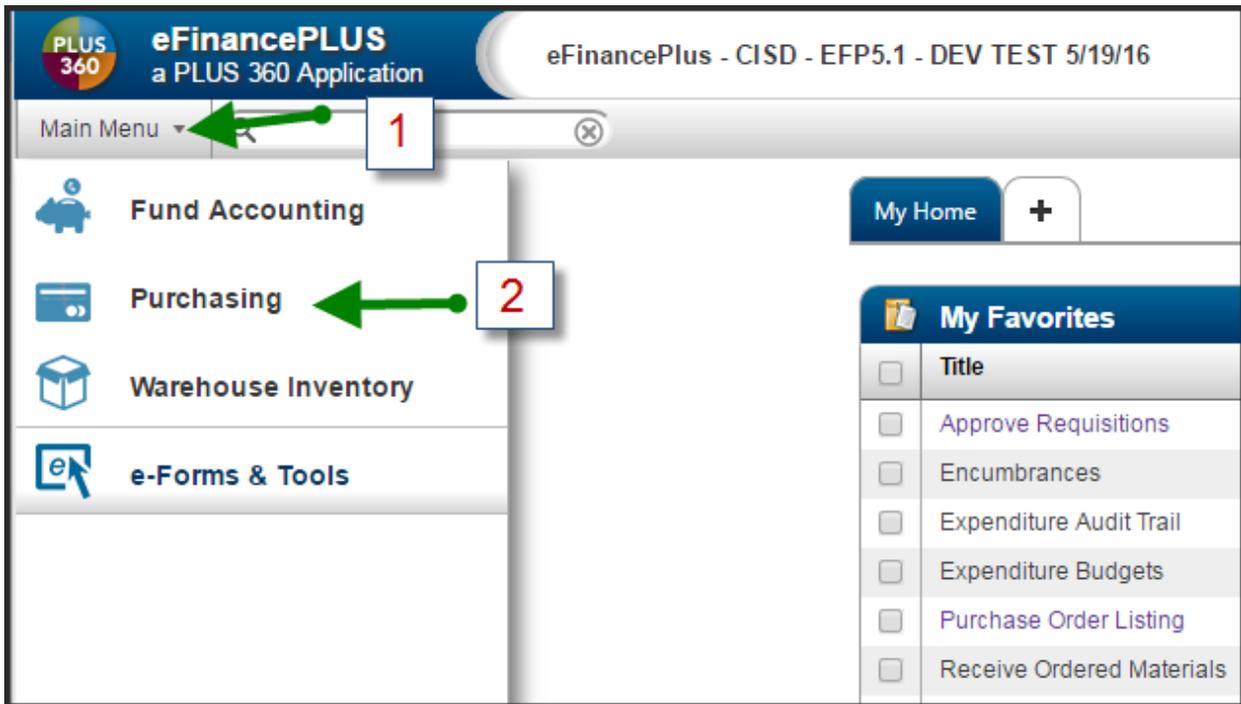


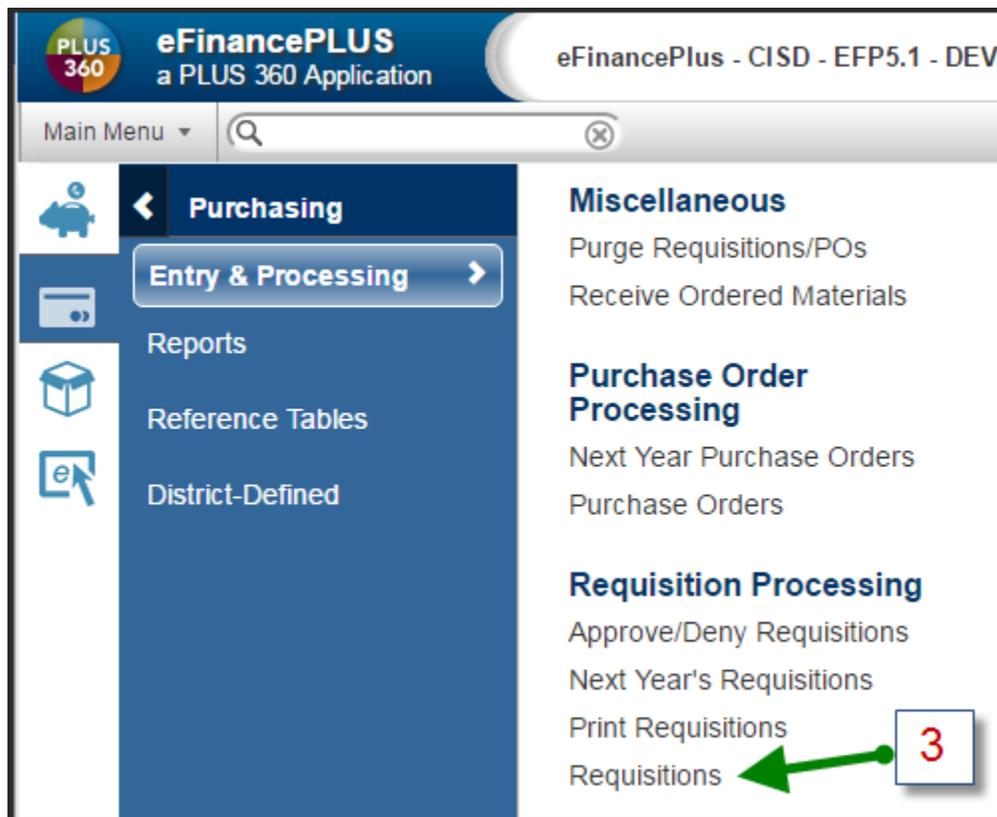
# HOW TO ENTER A REQUISITION

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

1. Hover over **Main Menu**
2. Click on **Purchasing**



3. Click on **Requisitions**



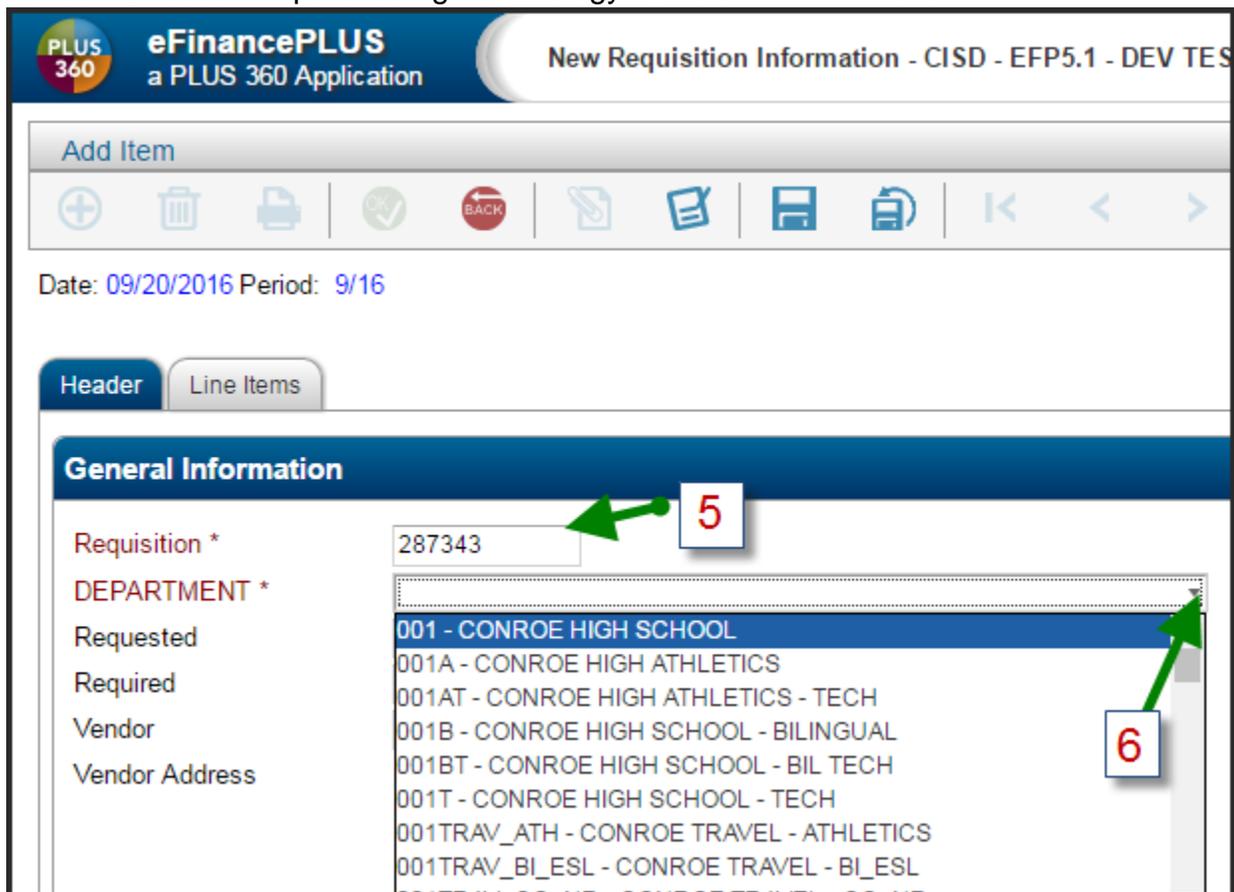
\*Once on this screen, click on the  icon in top menu to add to favorites.

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



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

6. 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.



7. Enter the vendor number and tab to next field.
8. The vendor name and address will populate. Confirm that it is the correct vendor.

Header Line Items

### General Information

Requisition *	287343
DEPARTMENT *	001 - CONROE HIGH SCHOOL
Requested	09/20/2016
Required	
Vendor	00000918
Vendor Address	DANIEL OFFICE PRODUCTS PO BOX 8375 THE WOODLANDS TX 77387-8375

Enable Full Account View

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

Header Line Items

### General Information

Requisition *	287343
DEPARTMENT *	001 - CONROE HIGH SCHOOL
Requested	09/20/2016
Required	
Vendor	
Vendor Address	

10. 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.
11. Click Find.

The screenshot shows a 'Search Criteria' form with the following fields: Vendor Code, Employee (checkbox), Inactive Status (dropdown menu showing 'N - Active'), Vendor Name (text input with '\*DANIEL OFFICE\*' and a callout box '10' with an arrow pointing to it), Search Name, Address Line 1, Address Line 2, City, State, Zip Code, Phone, Fax, and Contact. At the bottom, there are two buttons: 'Find' (with a magnifying glass icon) and 'Advanced' (with a computer icon). A callout box '11' with an arrow points to the 'Find' button.

12. 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.

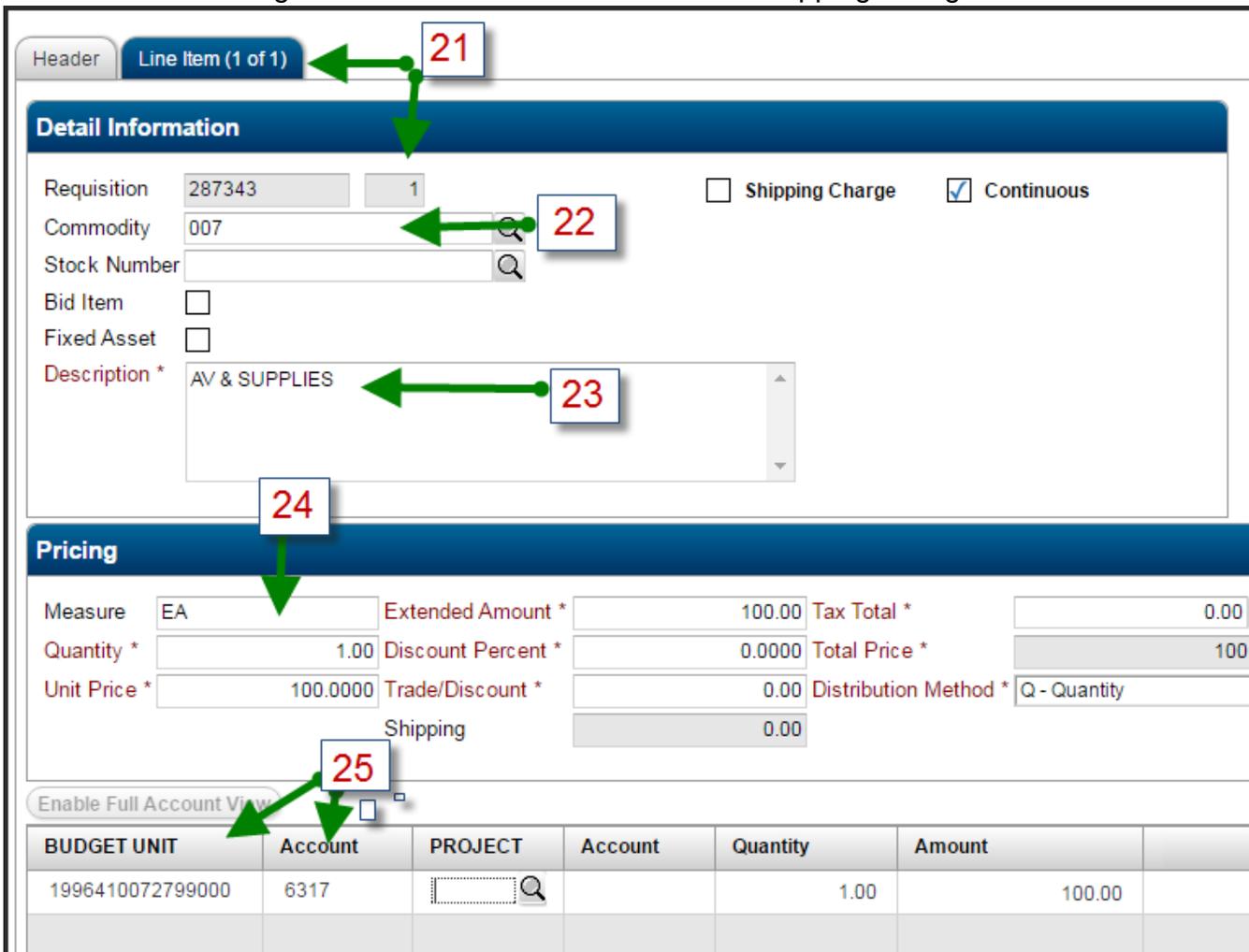
The screenshot shows the same 'Search Criteria' form as above, but now with search results displayed below the form. The search criteria are filled in: Vendor Name '\*DANIEL OFFICE\*', Search Name, Address Line 1, Address Line 2, City, State, Zip Code, Phone, Fax, and Contact. A callout box '12' with an arrow points to the first row of the results table.

Code	Vendor Name	Vendor Address	City	State
00000918	DANIEL OFFICE PRODUCTS	PO BOX 8375	THE WOODLANDS	TX



21. 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.
22. **Commodity** – enter the 6 digit commodity code with the dash. Ex. 750-001.
23. **Description** - When you enter the commodity this field auto-fills with the commodity description. Delete this information 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 1<sup>st</sup> 2 lines of the text box.
24. 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.
25. 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. Enter the last line as Shipping Charges.



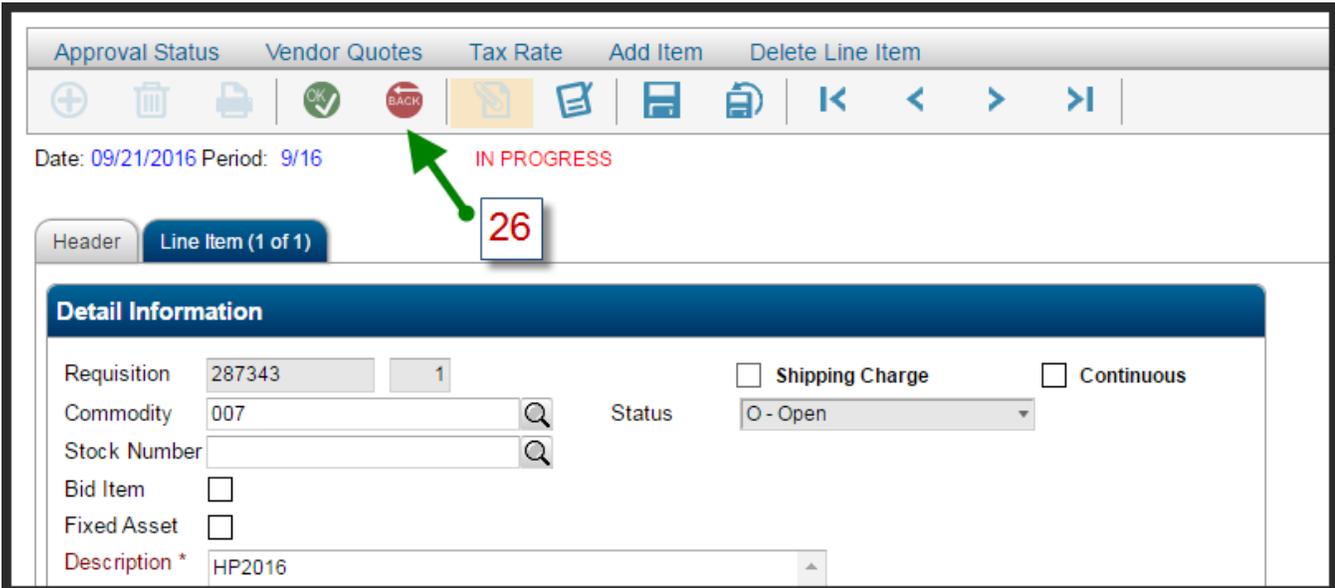
The screenshot shows a software interface for entering a requisition line item. It is divided into several sections:

- Header:** Shows "Line Item (1 of 1)" with a callout 21 pointing to it.
- Detail Information:** Contains fields for Requisition (287343, 1), Commodity (007, callout 22), Stock Number, Bid Item, Fixed Asset, and Description (AV & SUPPLIES, callout 23). There are checkboxes for "Shipping Charge" and "Continuous".
- Pricing:** Contains fields for Measure (EA, callout 24), Quantity (1.00), Unit Price (100.0000), Extended Amount (100.00), Discount Percent (0.0000), Trade/Discount (0.00), Tax Total (0.00), Total Price (100), and Distribution Method (Q - Quantity). A "Shipping" field is also present with a value of 0.00.
- Budget Unit:** A table with columns for BUDGET UNIT, Account, PROJECT, Account, Quantity, and Amount. The first row contains values: 1996410072799000, 6317, [searchable], 1.00, and 100.00. Callout 25 points to the "Enable Full Account View" checkbox and the "Account" field.

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

26. 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.



Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item

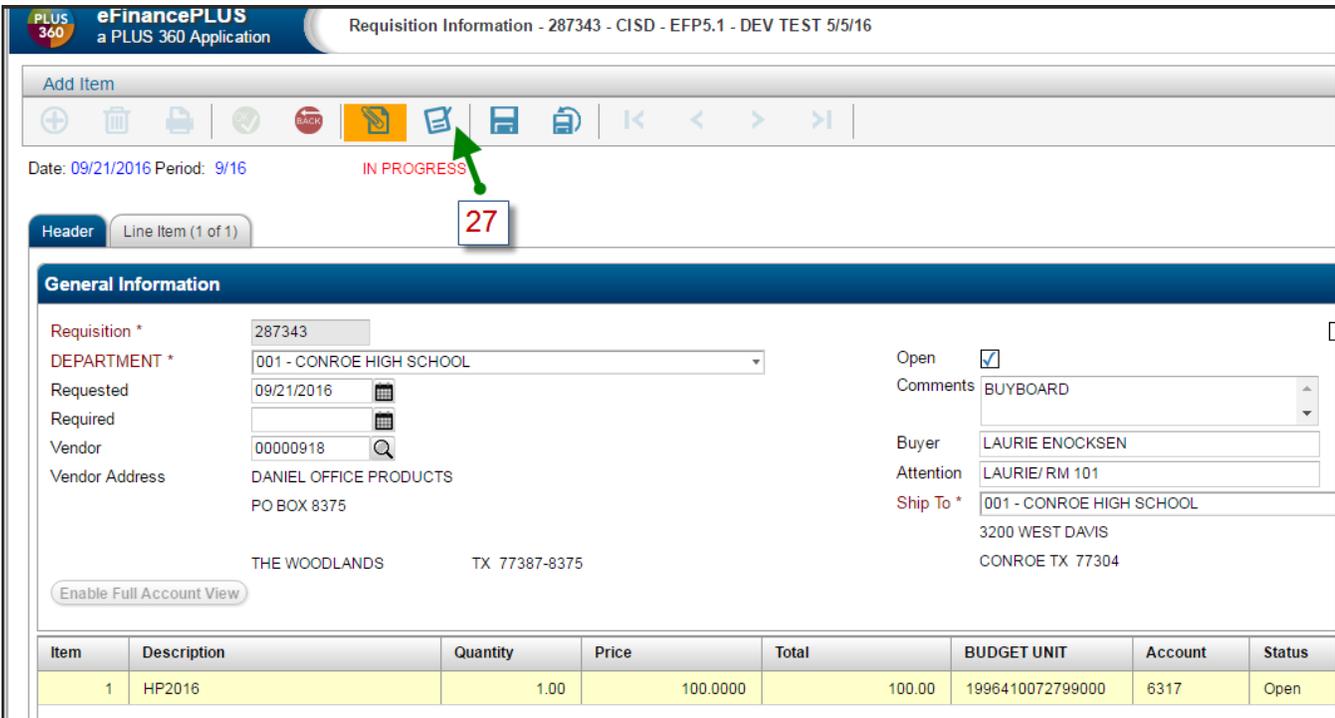
Date: 09/21/2016 Period: 9/16 IN PROGRESS

Header Line Item (1 of 1) **26**

### Detail Information

Requisition: 287343 1  Shipping Charge  Continuous  
Commodity: 007 Status: O - Open  
Stock Number:   
Bid Item:   
Fixed Asset:   
Description \*: HP2016

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



PLUS 360 eFinancePLUS a PLUS 360 Application Requisition Information - 287343 - CUSD - EFP5.1 - DEV TEST 5/5/16

Add Item

Date: 09/21/2016 Period: 9/16 IN PROGRESS

Header Line Item (1 of 1) **27**

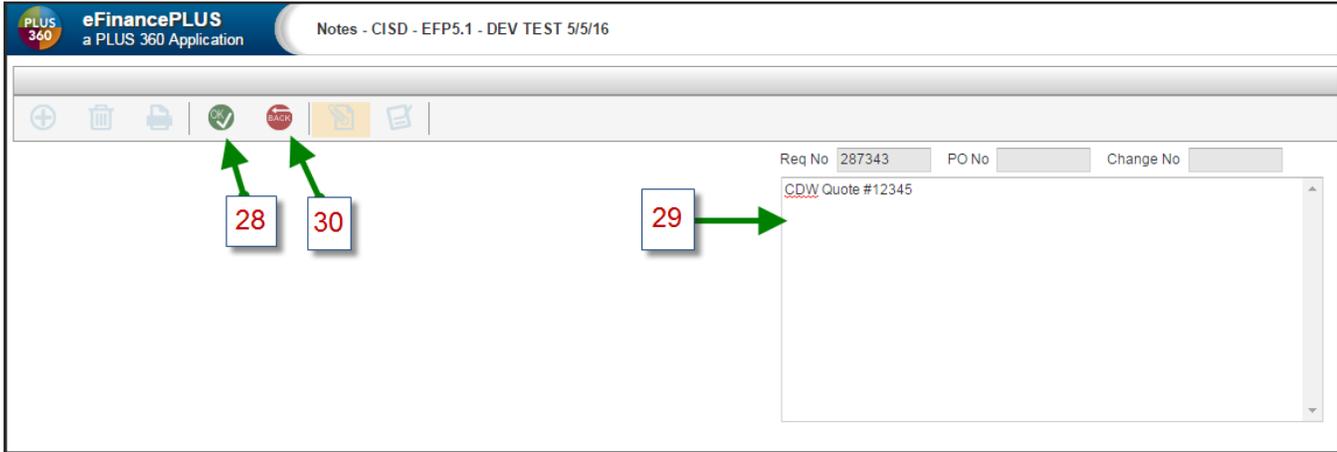
### General Information

Requisition \*: 287343  
DEPARTMENT \*: 001 - CONROE HIGH SCHOOL  
Requested: 09/21/2016  
Required:   
Vendor: 00000918  
Vendor Address: DANIEL OFFICE PRODUCTS  
PO BOX 8375  
THE WOODLANDS TX 77387-8375  
Open:   
Comments: BUYBOARD  
Buyer: LAURIE ENOCKSEN  
Attention: LAURIE/ RM 101  
Ship To \*: 001 - CONROE HIGH SCHOOL  
3200 WEST DAVIS  
CONROE TX 77304

Enable Full Account View

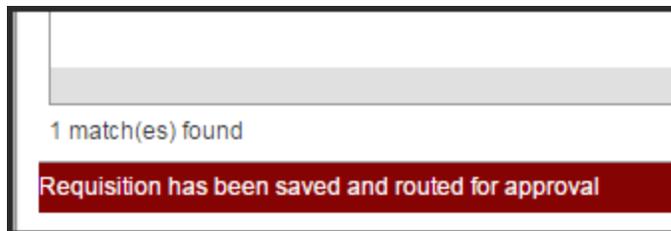
Item	Description	Quantity	Price	Total	BUDGET UNIT	Account	Status
1	HP2016	1.00	100.0000	100.00	1996410072799000	6317	Open

28. The **NOTES** window will appear. Click on the  icon to open the text field.
29. 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.
30. 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.



Once your requisition is complete, click on the  icon to **SAVE** the requisition.

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



You can also use the **SAVE IN PROGRESS** 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 . See How To Add Attachments instructions.  
\*Save all documents as a pdf before you add as an attachment.