




SMUSD: EARLY ORDERING FOR NEXT FISCAL YEAR (OUTSIDE VENDORS ONLY)

Navigation: Main Menu > Purchasing>Requisitions> Add/Update Requisitions

Step	Action
1.	Click the Add a New Value tab; click ADD.
2.	Requisition Name: MUST BEGIN WITH “1718”
3.	Requisition Date: MUST BE 07/01/2017
4.	Accounting Date: MUST BE 07/01/2017
5.	Click on Requisition Defaults
6.	Supplier: Enter Supplier ID
7.	Category: Enter Category Code (IF ALL ITEMS WILL BE THE SAME CATEGORY)
8.	Ship To: Enter “0000000999” for District Warehouse
9.	Due Date: MUST BE 07/01/2017, or later
10.	Distributions: Enter Chartstring (If all items are being charged to the same budget; If using multiple chartstrings – click Default Options: Override, so that you can add a second chartstring in the Distributions section). If each item will be charged to a different chartstring, enter them at the line level – see step 14 below
11.	Click OK
12.	Only one line for a description will be shown. Click on the + at the far right of the line to add additional rows; Enter number of row to add and click OK
13.	Details: Enter Description, Qty, UOM, Category Code and Unit Price
14.	Click on Schedule icon  , if adding chartstring at the line item level; then click Schedule icon  to add the chartstring(s)
15.	On the Schedule Screen, be sure the Due Date: is 07/01/17, or later
16.	Click Item Information Tab: Enter Supplier Item ID (Catalog #)
17.	FOR OPEN PO’S AND CONTRACTS: Click on the Attributes Tab: Click on box under Amount Only for all Open Purchase Orders and Contracts and Select Goods or Services from the Physical Nature dropdown box.
18.	When all lines have been entered; click SAVE
19.	Click “Budget Check” icon 
20.	Status should now be Pending; Budget Status should now be Valid