

1. Go to Requisition Entry

Tyler Menu \rightarrow Financials \rightarrow Purchasing \rightarrow Purchase Order Processing \rightarrow Requisition Entry Note: Requisition Entry can also be found on the Munis Dashboard on the Hub.

2. Click **Switch Form** on the ribbon at the top of the page ______, *Click on More if you don't see it.



3. Select **Regular** from the pop up box, click ok

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OK	Cancel	
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× Box Definitions:

CONTRACT – Use to enter a contract MREQ – Master form, don't use REGULAR – Use this to enter most requisitions WHSE – Use to enter a warehouse order

NONE – No modifications made full form

+

- 4. Click **Add** Add in the ribbon
- 5. Your Site/Department number will show in the **Dept/Loc** box
- 6. Press Tab
- 7. The Fiscal year will complete for you
- 8. **Tab** past the Requisition number box; a requisition number will auto-populate.
- In the General Description box enter a definition of the type of order you are creating, such as TEXTBOOKS, CLASSROOM SUPPLIES, ETC.

(REMEMBER ALWAYS USE CAP LOCK IN MUNIS).

Dept/Loc *	362
Fiscal year *	2024 O Cur
Requisition number *	24000955
General description	CLASSROOM SUPPLIES
General Notes	

Note			
Requisition	2024	24000955	
Date/Time		2023-07-23 14:23	Print on PO.
Created By	4180mkito		
SPSA: GENE	RAL ED PG	2	

10. Just below the General Description box is **General Notes.** This is where you can enter a note such as your school site plan justification for categorical programs. Remember to attach your school site plan page to the requisition. (Do Not flag this note to "Print on PO")

11. Click Accept and then click back.



- 12. Notice that the Status box is Status 2 **CREATED**
- 13. Tab past the $\ensuremath{\text{Needed}}\xspace$ box and the $\ensuremath{\text{Entered}}\xspace$ box that has auto-filled
- 14. Tab past the PO expiration box leaving it empty.
- 15. Tab past the Receive by bullet leaving it on Quantity
- 16. Tab past Three-way match that is checked
- 17. Tab past, Inspection required and Project accounts leaving the boxes unchecked.

You are now ready to complete the bottom half of the main page: Vendor and Shipping and Billing

E-Procurement Instructions

Veder Skplop and Billing Veder Big to a				
vedu 90 p 0 * 962 Name Address Address WidtPludts ERVICES. Delay method Pair Far EMail EProcurement Bio 0 HID AVENUE Rent	Vendor		Shipping and Billing	
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Votify originator when converted to PO/Contract.			Votify	originator when converted to PO/Contract.

18. Vendor – School Specialty eProcurement Vendor Number 20943

You can purchase from any of School Specialty's suites of brands using the same requisition as long as the funding is appropriate and the items are approved for purchase.

1. School Specialty brands:

Learning Environments: Califone Educational Technology, Childcraft Early Childhood Development, Classroom Select, Safe School Safety Products

Curriculum: Coach, Delta Education hands-on program materials, Foss, Spire ELA Products, Wordly Wise 3000 Intervention solutions

Education Essentials: Abilitations Special Needs Products, Frey Scientific, Sax Art and Crafts, School Smart & Classroom Direct School and Office Supplies, Sportime PE Equipment

- 19. Enter the vendor number listed above for School Specialty.
- 20. Tab past the Delivery method boxes and the Remit box until you arrive at the Ship to box.
- 21. The **Shipping Address** defaults to the warehouse.
 - a. Change the Shipping Address to your site number.
- 22. You will get a pop-up asking if you want to use the ship to code's default email, **click Yes**.
- 23. **Email** the correct email should have just populated, you can modify it if necessary.



- 24. **Reference** Use this field to enter the information you may need to know such as the Teacher's name and room number.
- 25. **Special handling** –Leave N NONE selected.
- 26. Terms section, Leave all the information with the default settings.
 - a. Discount % Leave blank, we utilize the Omnia piggyback bid through School Specialty and the US Communities Bid through Amazon. The discounts are already reflected when shopping on those sites.
 - b. **Freight %** There is no need to enter anything here, if there is a shipping charge it will be exported to your requisition when you transfer your cart back to Munis
 - c. Sales tax group Your correct tax is already entered, please leave it in place.
- 27. Click Accept, you will be transferred to the Line Items screen.



You are now ready to shop online at School Specialty.

	← Back	Q Search	Browse	+ Add	Update	Delete	Copy	Maas Allocate	Ship To	Shop Online
28. Click on Shop Online in the ribbon –										
		Requi	sition En	try [WEST	CONTRA	COSTA LI	VE] > Lii	ne Items >	Punch	out Vendors
20 Click on School Specialty			Ven	ndor Alpha	a Sort					
30. Click Accept			▶ 209	943 SCH	OOL SPEC	IALTY LL	.C			

31. You will be transferred to the vendors website where you can select the items you wish to purchase.

School Specialty.		1-888-388-3224 Search			L WEST CO	DNTRA COSTA USD mkitchen@v
Shop Our Products Shop By Learnin	ng Model	Shop by Learning Environment	Featured Assortments	- Ideas & Resources	Quick Order	My Dashboard
Shop Our Products 🛛 🗸 🗸	Shop By Lea	32. Each time y	ou add a product	t you will get	t a pop-up with	the option
Furniture	>	to Continue	Shopping or Go	to Cart.	This item has been successfully added:	×
School - Office Supplies	>		eepp8 e. ee		Elmaria Estra St	ronath
Art Supplies - Craft Supplies	>				Glue Sticks, 0.2 Pack of 60	1 Ounces,
Paper	>				QTY.1	\$35.55
Early Childhood	>					
English Language Arts	>				CONTINUE SHOPPING G	O TO CART
Math	>					
Physical Education - Sport	>	33. Once you ha	ave made all of y	our selectio	ns, click on Go f	to Cart.
Science	>					
Social Studies - Character Education	on >					
Special Needs	>					
School Safety	>					
Cleaning - Facility Supplies	>					
Educational Technology	>					
Career - Technical	>					
Outdoor - Playground	>					
Classroom Resources	>					

34. Your cart will open so that you can review your items and make any corrections or changes.



E-Procurement Instructions

	Vour Champing Car			[m		
	Cert 10232646721 Last modified or	07/23/2023		Best 100	2003	
	Pricing Program: OMNIA - FL/CA F	REE FREIGHT ALL				
	Phices are subject to change in saw	ni cents			ACTIONS	
	You are shopping with your OMIN	IA - FL/CA FREE FREIGHT ALL pricing program. Alternate pricing programs a	e available for this cars	OMNIA - FUCA	FREE FREIGHT ALL	
	15 Items					
	Product		Delivery	Quantity	Unit Price	Total Price
	ch per any	S.P.I.R.E. Phonogram Cards, 2-1/2 x 3-1/2 inches, Levels 6 to 8	Free Shipping Ineligible Details	10	\$26.29	\$262.90
	E St	Item 4: 9780838857489 Temponerity Out of Stock + On Onder		Remove		
		HOVETO 42*			- 1	io Other Discourts Apply
	Contraction of the local division of the loc	Sportime Max Women's ProRubber Basketball, 28-1/2 Inches	Shies Free with your Pricing Program	3	\$15.79	\$15.79
	THEAT	itam #: 017074 In Stock - Typicelly Ships Within 2-3 Days		Remove	524-29	
		Move to Litt				
	musuihe	School Smart Blunt Tip Kid Scissors 5 Inch, Assorted	🐙 Ships Free with your Pricing Program		514 DI	514.01
		Colors, Pack of 12 Item #: 026138		Remove	522.79	314.01
		In Shock + Typically Shipa Winter 2-3 Days				
		School Smart Classroom Grayon Pack with Storage Box.	Ships Free with your Pricing Program	1	\$38.99	538.99
		Allorita Colori, Face of 800 tem # 24002 In Stock - Registly Color Within 2-3 Days		Remove	559.99	
	Eliner	HOVE TO LET *				
		Childcraft Construction Paper, 9 x 12 Inches, Assorted	Ships Free with your Pricing Program	1	511.69	\$11.69
		Colors, 54055646 Isam #: 5465646 In Stock - Twelselly Stress Within 2-5 Days		Remove	517.99	
		KOVE TO UST				
	Annih.	School Smart Glue Sticks, 0.28 Ounces, Purple and Dries Clear, Pack of 30	Ships Free with your Pricing Program	i	\$12.15	\$12.15
35. Click on Transfer to bring your		Lem #: 3354356 In Stock - Typically Ships Within 2-3 Days		Remove	510.69	
		HOVE TO UST				
selected items back into Munis.						
			Subtotal			\$336 33
	Have Promotion Codes		+ Estimated Tax: () + Shipping: ()			\$38.60 \$39.44
	Enter Promotion Code		Total You Saver			\$434.37
	Aramational Code		APPLY			AMM (300.32)
	Disease area that Deservation O	ofer we are capitle. Description forder was not save				
	These note that womotion C	oues are uses sensitive. Homoton closes may not apply a packally priced in	****.			
	Next Step	SAVE CART	TRANSFER			

36. You will see the message to please wait and then this screen will open.

	Your items have been submitted to MUNIS.		
	Once in MUNIS, click the "continue" option to populate your requisition with your items.		
	It is OK to close this page.		
37. N 38. N	You can now click on close to close this page. You will be returned to Munis	\$	Line Items
39. (Click on Continue in the ribbon	← Back	Q Image: Continue Image: Continue Concel



40. All of your items will populate as line items in your Munis requisition.



← O Back Sea	R III + / / / arch Browse As Update	Lete Copy Mass Ship To Shop Onlin Allocate	10		
Requisition Entry	ry [WEST CONTRA COSTA LINE] > Li	ne Items			
Requisition					
Fiscal year	2024 Number	24000955 Line 1			
Detail					
Quantity *	10.00			Unit price	26.29000
				UOM *	EA -
Description *	ITEM: S.P.I.R.E. Phonog	ram Cards, 2-1/2 x 3-1/2 💼			
	Inches, Levels 6 to 8 Supplier Part No: 978083	8857489		Gross	262.90
	Manufacturar Part No. (1)	ICTOM 5748		Freight	.00
	Add'I Desc/Notes			Discount	.00.
				Taxable	262.90 📟
				Sales tax	25.63
				Credit	.00
				TOTAL	288.53
				Amount justification:	Not Needed
Seq T	Account		Description	Amount GL Bud	

41. Click update and add your account number to the first line item.

Seq T	Account	Description	Amount GL Bud
	•	••	

42. Click Accept.

43. Using the arrows at the bottom of the screen, go to your second line item.



44. Click update.

45. Place your cursor at the beginning of the Account section. Make sure that there are no spaces before your cursor.

Seq T	Account	Description	Amount GL Bud
01 Expense 💌			17.33

46. Click **Copy GL Acct** in the ribbon at the top of the screen to populate the same account code.



47. Click Accept

- 48. Continue adding your account code to each of the line items.
- 49. After entering your last account code click **Accept**, then click **Back** to go back to the main page of the requisition.
- 50. You are ready to send your requisition into workflow when your status is 4 Allocated.

Statu	ıs	4	Allocated



51. Click **Release** in the ribbon.



52. When you click release you will get this pop-up

U Munis										
Sales/Use Tax line(s)	Sales/Use Tax line(s) will be generated/updated before release can occur. Do you wish to override?									
	Continue	Override								

- 53. Click Continue
- 54. Your status will now be 6 (Released).
- 55. If you want to save a copy for your records, click on PDF and a copy will be created. Do not use the print option. Create and print the PDF.

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Close	Search	Browse	Add	Update	Delete	Output	Print	Display	PDF	Save	ReadyForms	ReadyForms Delivery Definitions

- 56. The requisition will process through the workflow approval process.
- 57. Once it arrives in purchasing it will be converted into a purchase order and your items will be ordered for you.