1. **Go to Requisition Entry**
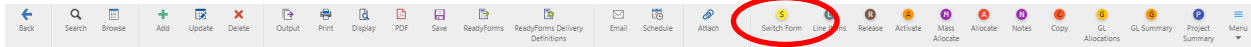   *Tyler Menu → Financials → Purchasing → Purchase Order Processing → Requisition Entry*
   Note: Requisition Entry can also be found on the Munis Dashboard on the Hub.

2. Click **Switch Form** on the ribbon at the top of the page

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

   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** 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.
9. 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).
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 **Needed by** box and the **Entered** 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.

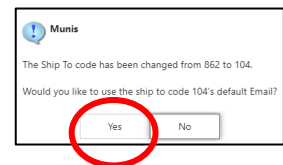**You are now ready to complete the bottom half of the main page: Vendor and Shipping and Billing**

18. **Vendor** – Currently we have two vendors set up with E-procurement capabilities, we will introduce more in the future.

   a. **School Specialty 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
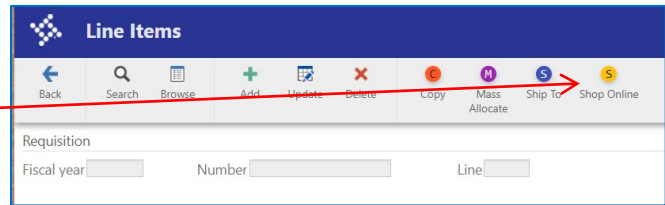
   b. **Amazon Business Vendor Number 11220**

   You are able to purchase from Amazon when items are not available at School Specialty or Southwest School and Office Supply. The items must meet district standards and funding guidelines. If you are using categorical funding you need to meet all funding restrictions.

19. **Enter** the vendor number listed above for the company you want to purchase from.

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.**

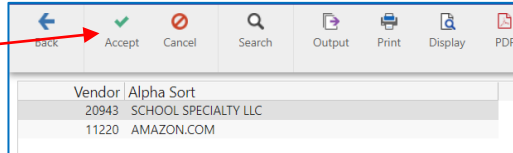**You are now ready to shop online at your selected vendor.**

Line Items

← Back | Search | Browse | + Add | Update | ✕ Delete | © Copy | ⓜ Mass Allocate | ⓢ Ship To | ⓢ Shop Online

Requisition

Fiscal year [   ]   Number [   ]   Line [   ]

28. **Click** on **Shop Online** in the ribbon
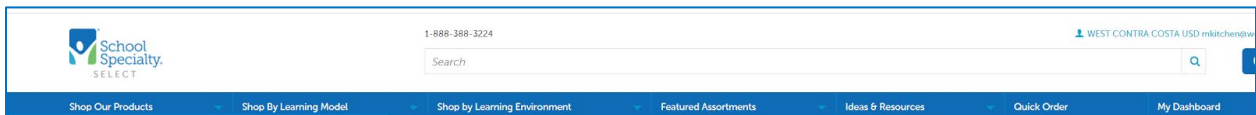
29. Click on your **selected vendor**.

30. Click **Accept**

← Back | ✓ Accept | ⊘ Cancel | Search | Output | Print | Display | PDF

Vendor	Alpha Sort
20943	SCHOOL SPECIALTY LLC
11220	AMAZON.COM

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

32. Each time you add a product you will get a pop-up with the option to Continue Shopping or Go to Cart.

This item has been successfully added:

Elmer's Extra Strength Glue Sticks, 0.21 Ounces, Pack of 60
QTY: 1 $35.55

CONTINUE SHOPPING | GO TO CART
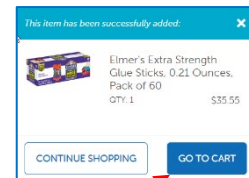
33. Once you have made all of your selections, **click** on **Go to Cart.**
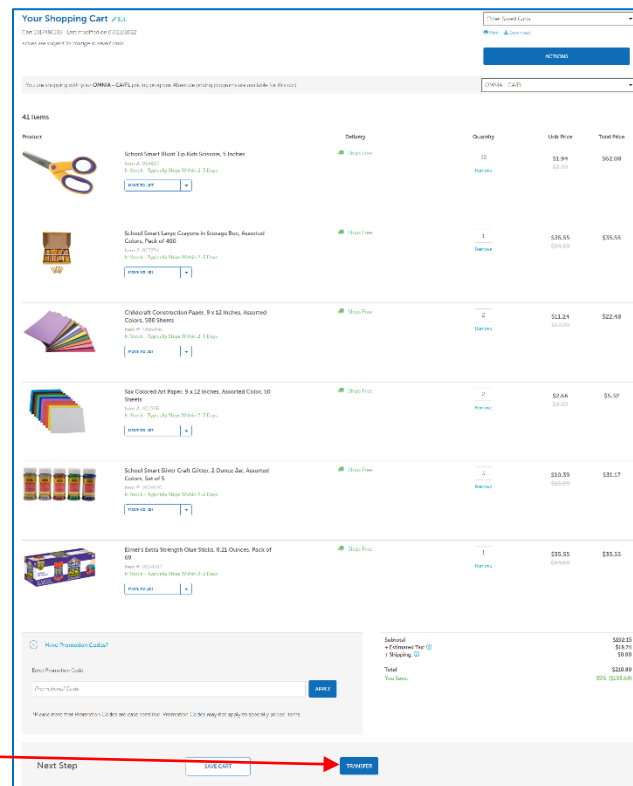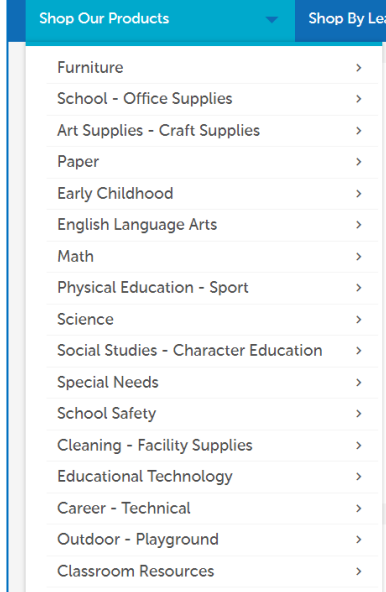
34. Your cart will open so that you can review your items and make any corrections or changes.

35. Click on **Transfer** to bring your selected items back into Munis.

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. You can now click on **close** to close this page.
38. You will be returned to Munis
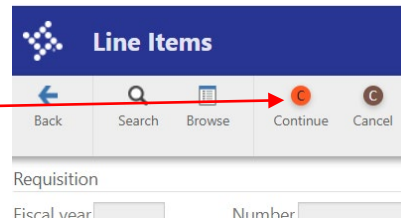39. Click on **Continue** in the ribbon

Line Items

Back   Search   Browse   Continue   Cancel

Requisition

Fiscal year   Number

40. All of your items will populate as line items in your Munis requisition.
    a. **Notice** that the Item information is in lower case. **It's okay you can leave it that way.**

Back Search Browse Add Update Delete Copy Mass Allocate Ship To Shop Online

Requisition

Fiscal year 2023   Number   23000710   Line   1

Detail

Quantity *   32.00   Unit price   1.94000
                                                               UOM *   EA   ...

Description *   ITEM: School Smart Blunt Tip Kids Scissors, 5 Inches
                Supplier Part No: 084837   Gross   62.08
                Manufacturer Part No: 084837   Freight   .00
                ☐ Add'l Desc/Notes   Discount   .00   %
                                                                Taxable   62.08
                                                                Sales tax   5.74
                                                                Credit   .00
                                                                TOTAL   67.82

                                                                Amount justification: Not Needed

Seq T   Account   Description   Amount GL Bud

41. Click **update** and **add your account number** to the first line item.
42. Click **Accept**.
43. Using the arrows at the bottom of the screen, **go to your second line item**.

«   ‹   2 of 6   ›   »
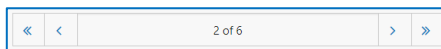
44. Click **update**.
45. Place your cursor at the beginning of the Account section. Make sure that there are no spaces before your cursor.

Seq T   Account   Description   Amount GL Bud
01   Expense   ▼   -   -   -   -   -   - -   ...   38.84

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

Line Items

Back Accept Cancel Search Delete Copy GL Acct rowse_pl_gl_budget_groupings
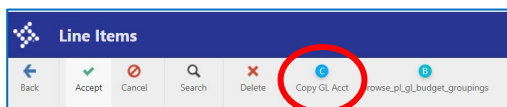
47. Click **Accept**

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.

51. Click **Release** in the ribbon.
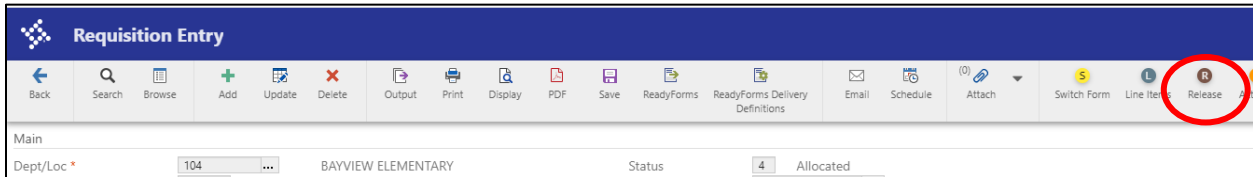
52. When you click release you will get this pop-up
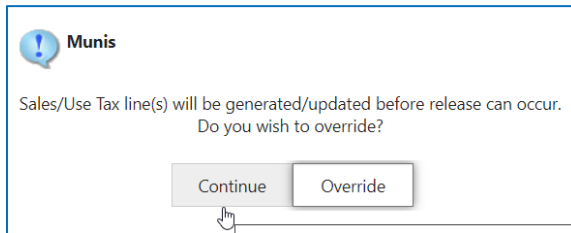
53. Click **Continue**

54. Your status will now be 6 (Released).
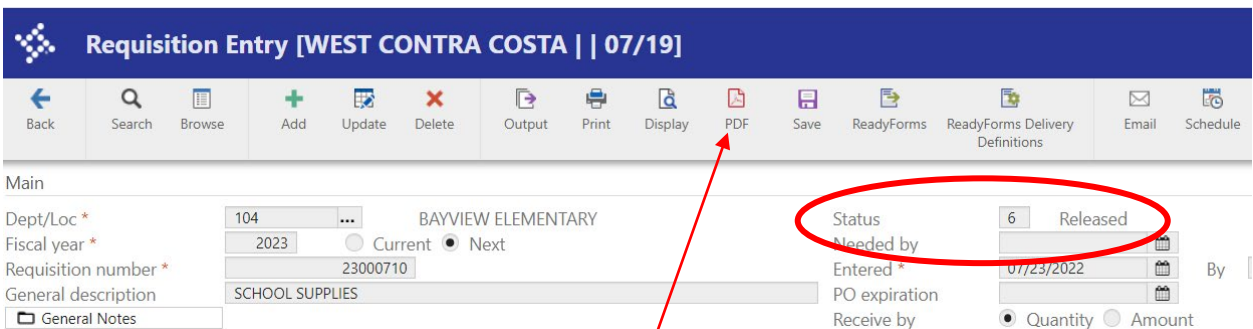
55. If you want to save a copy for your records, click on PDF and a copy will be created.

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.