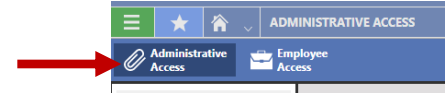


## Pflugerville Independent School District – Finance User Guide

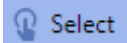
### Enter a Warehouse Request

#### Enter a Warehouse Request

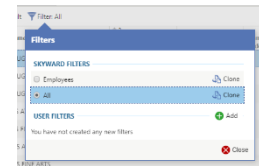
**Note:** User must be in Administrative Access to complete the steps below.




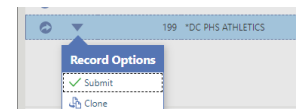
1. Click the menu icon  and select Warehouse > Warehouse Request.
2. Click Add Warehouse Request  located on the far right of the screen.
3. Enter the required information:

- **Warehouse Request Group** – Click dropdown arrow, click the finger  to Select appropriate option
- **Fiscal Year** – verify the correct year
- **Delivery Instructions** – enter where to deliver items, if urgent put date needed by
- **Requested for:**

- a. Click the dropdown arrow and change the filter to **All**
- b. In the search field type **\*DC**
- c. Select the appropriate Distribution Center






- **Request Date** – defaults to today's date (Warehouse staff will change this to delivery date)
4. Click **Save & Add Detail** - button located at the top left of the screen. The **Add Warehouse Request Detail** screen displays.
  5. Enter the required information:
    - **Item** – Start typing code to bring up options, click to select option
    - **Stock Quantity** – enter quantity or “1” as appropriate
    - **Unit cost and Amount**– will autofill after quantity is entered
    - **Account** – Start typing account number (Shortcut: in place of “E” type a 5) Select an option.  
**Note:** use the second account field if two accounts are needed to split the purchase
  6. Click **Save and Submit** or **Save** - buttons found at the top left of the screen.  
**Note:** If **Save** is selected, the request can be submitted from the Warehouse Request List screen by clicking the dropdown arrow  and selecting Submit.



(Continued on page 2)

## Add a Column to view Warehouse staff comments (e.g. when request will be delivered or reason for denial)

1. Click the gear  to the right of Delivery Instructions.
2. Click insert column. 
3. Click the magnifying glass. 
4. Type **Comment** in the field and click the magnifying glass.
5. Select **Comment** from the options and click **Select Field**.



6. The **Comment** column will display to the right of Delivery Instructions.

