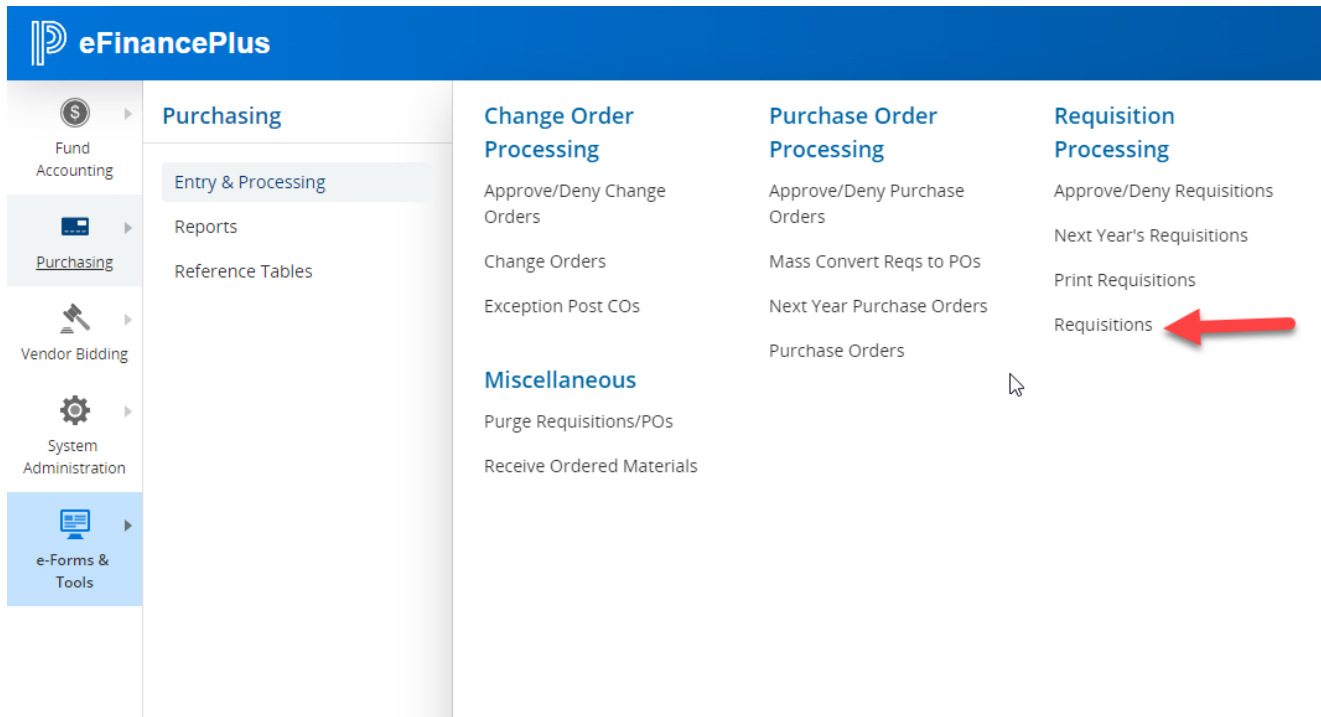


eFinancePlus Punchout Shopping Walkthrough

Step 1

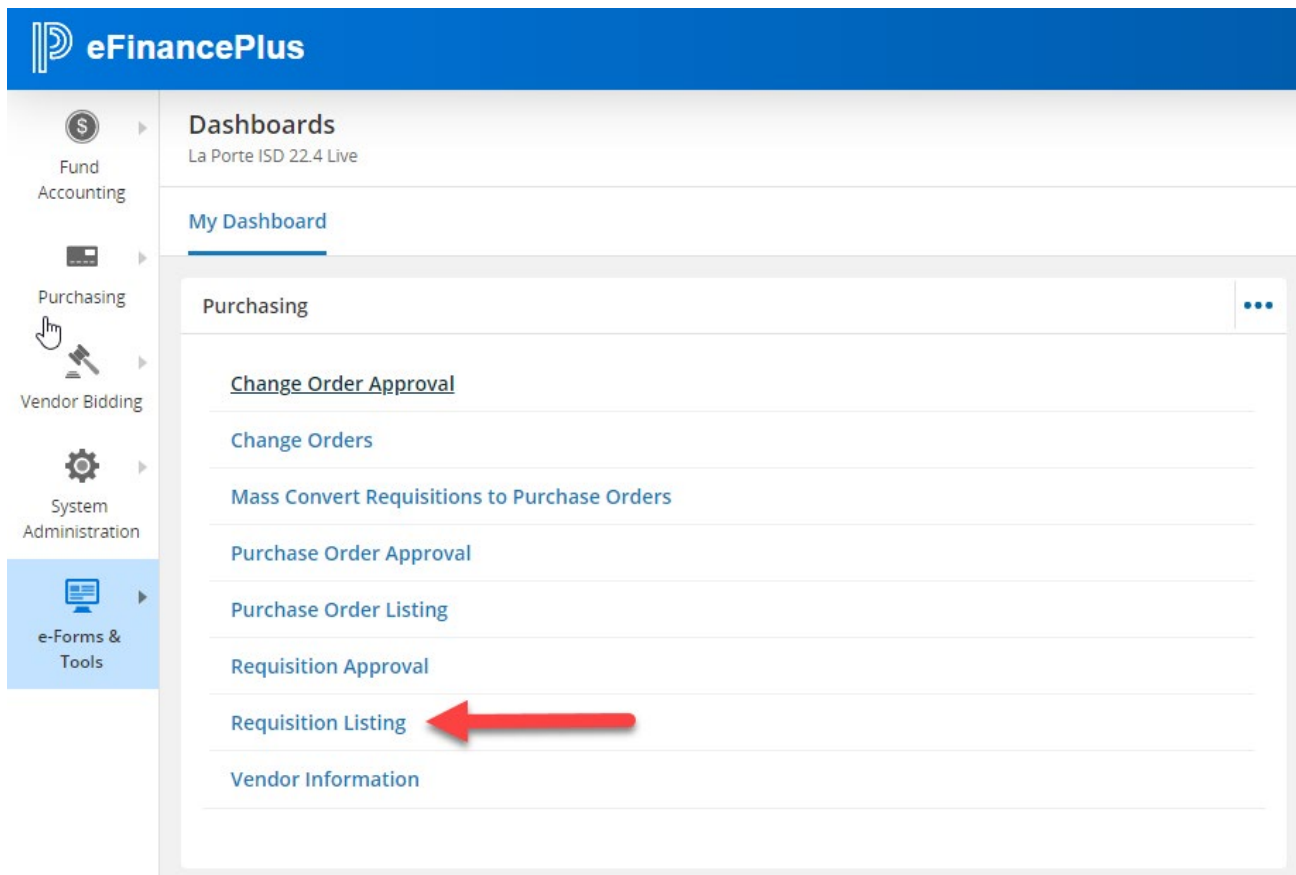
From the Main Menu, select Purchasing, Entry & Processing, Requisitions.



The screenshot shows the eFinancePlus main menu. The left sidebar contains the following items: Fund Accounting, Purchasing (highlighted), Vendor Bidding, System Administration, and e-Forms & Tools. The main content area is divided into four columns: Change Order Processing, Purchase Order Processing, Requisition Processing, and Miscellaneous. A red arrow points to the 'Requisitions' link in the Requisition Processing column.

Change Order Processing	Purchase Order Processing	Requisition Processing	Miscellaneous
Approve/Deny Change Orders	Approve/Deny Purchase Orders	Approve/Deny Requisitions	Purge Requisitions/POs
Change Orders	Mass Convert Reqs to POs	Next Year's Requisitions	Receive Ordered Materials
Exception Post COs	Next Year Purchase Orders	Print Requisitions	
	Purchase Orders	Requisitions	

Alternatively, if you have Favorites saved on your dashboard, select "Requisition Listing."



The screenshot shows the eFinancePlus dashboard. The left sidebar contains the following items: Fund Accounting, Purchasing (highlighted), Vendor Bidding, System Administration, and e-Forms & Tools. The main content area shows the 'Dashboards' section for 'La Porte ISD 22.4 Live'. Under 'My Dashboard', there is a 'Purchasing' dashboard with a list of favorites. A red arrow points to the 'Requisition Listing' favorite.

Favorite
Change Order Approval
Change Orders
Mass Convert Requisitions to Purchase Orders
Purchase Order Approval
Purchase Order Listing
Requisition Approval
Requisition Listing
Vendor Information

Step 2

Click the "Punchout Shopping" button. If the button is missing, please contact Lynley Marlar.

Requisition Listing - La Porte ISD 22.4 Live

[Print Requisitions](#) [Budget Transfers](#) [Budget Adjustments](#) [Set Period](#) [Punchout Shopping](#)

Date: 05/24/2023 Period: 11/23

Search Criteria

Year	<input type="text" value="2023"/>	Recommended Vendor	<input type="text"/>
Requisition	<input type="text"/>	Ship To	<input type="text"/>
Buyer	<input type="text"/>	APPROVAL GROUP	<input type="text"/>
Date Requested	<input type="text" value="28"/>	Attention	<input type="text"/>
Date Required	<input type="text" value="28"/>	Status	<input type="text"/>

Step 3

Once you are in the punchout module, it will automatically take you to the Start New Order screen. Start your order by selecting the Vendor from the dropdown menu.

Vendor Punchout - La Porte ISD 22.4 Live

[View My Orders](#)

Vendor Interface*:

Approval Group*:

Requested:

Required:

Ship To*:

Distribution

Default Budget Code*:

Default Project:

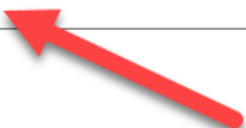


Note: Any item with a red asterisk * is a required field that must be completed before the system will allow you to proceed.

Step 4

Select the correct Approval Group from the dropdown menu.

Vendor Punchout - La Porte ISD 22.4 Live





[View My Orders](#)

Vendor Interface*:	Amazon Capital Services, Inc. ▾
Approval Group*:	BUSOFC031 [Business Office] ▾ 
Requested:	<input type="text"/> 
Required:	<input type="text"/> 
Ship To*:	Lpisd Warehouse ▾
Distribution	
Default Budget Code*:	Please select a Budget Code ▾
Default Project:	Please select a Project ▾

Step 5

Skip the "Requested" or "Required" dates and also the "Ship To" address as it defaults to the LPISD Warehouse, and move to the Default Budget Code. Select the correct budget code from the dropdown menu, making sure that the budget code matches the approval group you selected above.

[View My Orders](#)

Vendor Interface*:	Amazon Capital Services, Inc. ▾
Approval Group*:	BUSOFC031 [Business Office] ▾
Requested:	<input type="text"/>  
Required:	<input type="text"/> 
Ship To*:	Lpisd Warehouse ▾
Distribution	
Default Budget Code*:	Gf Bus [1993410075099031] ▾ 
Default Project :	Please select a Project ▾

Step 6

Skip the "Default Project" and move to the next column. The vendor number auto-populates so, type "PPD" in the Freight field.

Start New Order

Vendor:	1009763
Freight:	<input type="text" value="PPD"/>
Comments:	<input type="text" value="CHOICE PARTNERS"/>
Buyer*:	<input type="text" value="BUS OFF/MARLAR"/>
Attention*:	<input type="text" value="BUS OFF/ATKINS"/>
Default Account*:	<input type="text" value="General Supplies [6399]"/>
Default Account :	<input type="text"/>

Step 7

Type the Cooperative Name or Bid Number in the "Comments" field.

Start New Order

Vendor:	1009763
Freight:	<input type="text" value="PPD"/>
Comments:	<input type="text" value="CHOICE PARTNERS"/>
Buyer*:	<input type="text" value="BUS OFF/MARLAR"/>
Attention*:	<input type="text" value="BUS OFF/ATKINS"/>
Default Account*:	<input type="text" value="General Supplies [6399]"/>
Default Account :	<input type="text"/>

Step 8

In the "Buyer" field, enter your location and name as usual.

Start New Order

Vendor:	1009763
Freight:	PPD
Comments:	CHOICE PARTNERS
Buyer*:	BUS OFF/MARLAR
Attention*:	BUS OFF/ATKINS
Default Account*:	General Supplies [6399]
Default Account :	

Step 9

Enter the location and name of the person who will be receiving the items in the "Attention" field.

Start New Order


Vendor:	1009763
Freight:	PPD
Comments:	CHOICE PARTNERS
Buyer*:	BUS OFF/MARLAR
Attention*:	BUS OFF/ATKINS
Default Account*:	General Supplies [6399]
Default Account :	

Step 10

Select the Default Account (ex. 6399) from the dropdown menu.

Start New Order


Vendor:	1009763
Freight:	PPD
Comments:	CHOICE PARTNERS
Buyer*:	BUS OFF/MARLAR
Attention*:	BUS OFF/ATKINS
Default Account*:	General Supplies [6399] ▼
Default Account :	▼



Step 11

Click "Submit to Vendor." You will be taken to the vendor's website to create your cart.

Vendor:	1009763
Freight:	PPD
Comments:	CHOICE PARTNERS
Buyer*:	BUS OFF/MARLAR
Attention*:	BUS OFF/ATKINS
Default Account*:	General Supplies [6399] ▼
Default Account :	▼



Submit to Vendor	Cancel
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Step 12

Create your cart and check out. This step will look different for each vendor because you are in their punchout website. When you check out, the system will pull your cart into eFinance and automatically create your requisition and submit it for approval. Once back in eFinance, you will be able to see your requisition number.