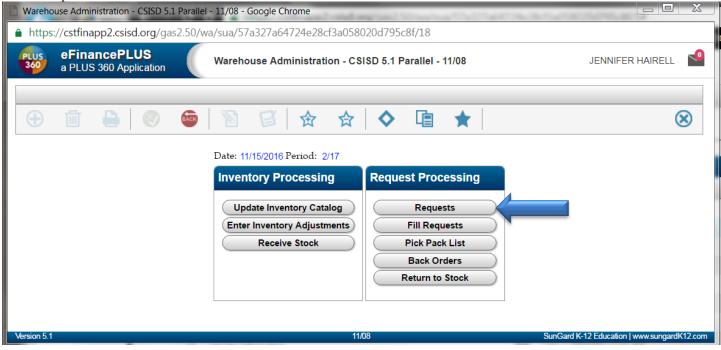
# **Entering a Warehouse Requisition**

Log into eFinance Plus 5.1

eFinancePLUS a PLUS 360 Application	eFinancePlus - CSISD 5.1 Parallel - 1	1/08		JENNIFER HAIF	RELL 🤷 ★
enu 🔹 🔍	$\otimes$				
Warehouse Inventory Entry & Processing	Detailed Displays Inventory Transactions	-			
Reports	Periodic Routines	:	Documents		×
	Batch Inventory Transactions		File Name	Created On	Size
Reference Tables	Process General Ledger		massreq_12322.pdf	2016-11-14 15:27	3 KB 🔺
	Charges		packlist_24254.pdf	2016-11-11 13:12	5 KB
	Purge Requests		massreq_3232.pdf	2016-11-10 15:54	3 KB
	Year End Procedures		packlist_18744.pdf	2016-11-10 14:26	4 KB
			packlist_28705.pdf	2016-11-10 12:30	7 KB
	Warehouse Inventory		packlist_27237.pdf	2016-11-10 09:35	4 KB
	Approve Requests		packlist_9067.pdf	2016-11-10 08:03	4 KB
	Batch Requests		transdet_11167.pdf	2016-11-09 09:55	4 KB
	Warehouse Administration		transdet_9827.pdf	2016-11-09 08:54	4 KB
			transdet_31797.pdf	2016-11-09 08:53	11 KB
			transdet_31624.pdf	2016-11-09 08:52	8 KB

A new window will open. (If it does not open, check to make sure that you have set your Pop-Up blocker to allow efinance to send you Pop-Ups.)

### Select Requests



Select New Document (circle with a plus sign)

e Request	- CSISD 5	.1 Parallel - 11/08 - Goo	ogle Chrome					= X
s://cstfin	app2.csi	sd.org/gas2.50/wa/s	sua/57a327a64724e28cf3a0580	)20d795c8f/19				
	<b>anceP</b> S 360 Ap	LUS Upplication	lpdate Request - CSISD 5.1 Par	allel - 11/08		JE	ENNIFER HAIRE	LL 🥤
<b>⊕</b> 1	0		8 B A A	♦ @	*			8
te: 11/15/2016 earch Crite		2/17						
Request Numl	ber							
Request Year		•						
Varehouse	_	100	*					
Date Requeste	d	<b></b>						
Requested By								
Date Required Ship Code	-		*					
Comments			•					
			🙀 Find 🏼 🙀 Advar	nced				
Request N	Year	Warehouse	Date Reques	Ву		Date Required	Ship Code	с
								-
								-
		l					1	•
ion 5.1			11/	08		SunGard K-12 E	ducation   www.sung	gardK12.co

## Write down the request number now.

From drop down menu select 923-Warehouse

Add New	Request - CSISD 5.1 Par	allel - 11/08 - Google Chron	ne							~~
https://	cstfinapp2.csisd.org	/gas2.50/wa/sua/57a32	7a64724e28cf3a	058020d795c8f	f/21					
		Add New Ro	equest - CSISD	5.1 Parallel - 11/	08		JENNIFER	HAIRELL 🎴		×
https://cstfinapp2.csisd.org/gas2.50/wa/stua/57a327a64724e28cf3a058020d795c8f/21     Image: PLUS 360 Application     Add New Request - CSISD 5.1 Parallel - 11/08     JENNIFER HAIRELL     Image: PLUS 360 Application     Image: PLUS 360 Application										
Request N Request Y Warehous Date Requ Requested Date Requ Ship Code	Jumber *         11553           iear         2017 •           ise *         923 • WARE!           isested         925 • FACILIT           inred	HOUSE TIES - FUEL TANKS	V Cont							
	Stock Number	BUDGET CODE	Account	PROJECT	Account	Quantity	Price	Status	Rece	•

Date Requested will automatically show today's date.

Requested By: enter name

Date Required: date item is required by

Ship Code: Drop down menu and select campus/department or type in your number to select

Add New Request	- CSISD 5.1 Parallel - 11/08	- Google Chrome									
https://cstfinap	p2.csisd.org/gas2.50/v	va/sua/57a327a64	724e28cf3a0	58020d795c8t	f/21						
<b>• 1</b>	🖹 🔇 🍥	88									
Date: 11/15/2016 Pe Request Number '			🖌 Continu	lous							
Request Year	2017 -										
Warehouse *	923 - WAREHOUSE		r								
Date Requested	11/15/2016										
Requested By	JHAIRELL										
Date Required	11/15/2016										
Ship Code *				*							
Comments	001 - A&M CONSOLIDA 001CS - HIGH SCHOOL										
Item Stoc	001FS - HIGH SCHOOL 002 - COLLEGE VIEW H 002-2 - COLLEGE VIEW	CAFETERIA IGH SCHOOL	- 1	ROJECT	Account	Quantity	Price				

Comments: Enter notes to WH Staff or for your records. Tab to Stock Number

Enter the Stock Number (Catalog number) – This will automatically fill the account field and unit price. (See below.)

(Tip: You can search the stock items by clicking on the magnifying glass in the Stock Number area. click find to see all stock items or enter all or

part of item name.)

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a	327a64724e28cf3a058020d795c8f/23
eFinancePLUS a PLUS 360 Application Add New	v Request - CSISD 5.1 Parallel - 11/08
①      ①     ①     ①     ①     ①     ①     ①     ①     ①     ①	
Date: 11/15/2016 Period: 2/17 Request Number * 115539 Request Year 2017 * Warehouse * 923 - WAREHOUSE	✓ Continuous
Date Requested 11/15/2016	
Ship ATI**** CENTRAL R	RECEIVING • NEW LOCATI**** CENTRAL RECEIVING
Comments EXAMPLE ORDER DO NOT FILL Item Stock Number BUDGET CODE	Use the magnifying glass to search for stock item. See example below.
2	
3	

**Using Search to locate stock number**: Click on the magnifying glass in the stock number box. When page opens enter keyword using asterisks before and after the word. Click Find. You can also leave search areas black and eFinance will bring up all items in the warehouse. See example below:

Search	
Warehouse	923
Stock Number	
Description	*PENS*
Available	
Back Ordered	

## **Results**:

Warehouse	923						
Stock Number	:						
Description	*PENS*						
Available							
Back Ordered							
On Order		Find Advanced					
	( grad	Pind age Advanced					
Warehouse	Stock Number	Description	Measure	Available	Back Ordered	On order	
923	117000	DISPENSER PLASTIC TAPE 1" CORE	EACH	185.0000	0.0000	0.0000	
923	142091	DISPENSER POP UP POST-IT-NOTE 3 X 3 BLACK	EACH	48.0000	0.0000	0.0000	
923	152350	PENS HIGHLITER YELLOW 12/BX	BOX/12	47.0000	0.0000	0.0000	
923	152352	PENS HIGHLIGHTER GREEN	BOX/12	90.0000	0.0000	0.0000	
923	152354	PENS HIGHLIGHTER PINK	BOX/12	81.0000	0.0000	0.0000	
923	152470	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLACK	DOZEN	98.0000	0.0000	0.0000	
923	152471	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLUE	DOZEN	100.0000	0.0000	0.0000	
923	152472	PENS ROLLING BALL RETRACTABLE GEL FINE PT. RED	DOZEN	100.0000	0.0000	0.0000	
923	152480	PENS ROLLING BALL UNI BALL GEL GRIP MED. PT. BLACK	DOZEN	86.0000	0.0000	0.0000	
	152482	PENS ROLLING BALL UNI BALL GEL GRIP MED PT. BLUE	DOZEN	96.0000	0.0000	0.0000	
923		PENS ROLLING BALL UNIBALL GEL GRIP MED. PT. RED	DOZEN	96.0000	0.0000	0.0000	
923 923	152484						
	152484	PENS BALLPOINT ROLLER BALL FINE BLACK	BOX/12	180.0000	0.0000	0.0000	

Once you find the item you want double click the item and the stock number will be entered into your request. If you do not find what you want use the back button to get back to your request.

If you X out of this window you will close your request.

Enter Budget Code. Change Account Number if necessary. (See below)



## Tab past SUB PROJECT and Account to Quantity. Enter Quantity.

### Hit Tab to go to the next line. If you hit Enter you will submit your request.

(You can still add more items if this happens see last page of these instructions.)

Scroll to the right and you will see the unit price and a brief description of each item including unit of measure (i.e. case, ream, 4/pk).

	<b>eFinanceP</b> a PLUS 360 A		Add	JENNIFER HAIRELL 🞴 🖓 🗙								
•	Ū 🗎		BACK	B								×
Date: 11/15	5/2016 Period:	2/17							If an itam	way wa gwaata	d is wat avails	ble .
Request N	Jumber *	115539			🗸 Continu	ous			n an nem	you requeste	d is not availa	
Request Ye	'ear 2017	7 *							then a back	t order will b	e created. You	will
Warehouse	se * 923 -	- WAREHOU	JSE	*				~	see anv	back orders i	in this columr	
Date Requ	aested 11/18	5/2016										
Requested	l By JHA	IRELL									~	
Date Requ	aired 11/15	5/2016	<u> </u>									
Ship Code	e* 923 -	- NEW LOCA	ATI**** CENTF	RAL RECEIVING	,	NEW LOCAT	I**** CENT	RAL RECEIVING				
Comments	EXA	MPLE ORD	ER DO NOT FI	LL						9		
r B	BUDGET CODE	E A	ccount	PROJECT	Account	Quantity	Price	Status	Receive Date	Back Order	Total Amount	Description
1	1997510092399	063 6	399			2.0000	10.1800	O - Open		0.0000	20.36	PENS ROLLING BALL RETRACTABLE GEL FINE PT B
Q						0.0000	0.0000	O - Open		0.0000	0.00	
						0.0000	0.0000	O - Open		0.0000	0.00	

If you are done: Make sure you have written down your request number and Click OK. This will submit your request.

You must click OK to submit the request. Once you hit OK a red flag will pop up next to the Warehouse line stating Request added When you see the screen below <u>the request number has rolled over to a new one</u> and you are ready to enter another request or exit.

	https://c	stfinap	p2.csisd.org/g	as2.50/wa/sua/57a327a	a64724e28cf3a	058020d795c8f	/23				
			cePLUS 60 Application	Add New Red	quest - CSISD {	5.1 Parallel - 11/	08				
				🎰 🛛 🔂 🔁							
	Date: 11/15/2	2016 Pe	riod: 2/17								
	Request Nu	mber *	115540		🗸 Conti	nuous					
	Request Yea	ar	2017 -								
*	Warehouse	*	923 - WAREHO	OUSE Request added							
	Date Reque	sted	11/15/2016								
	Requested I	Зy	JHAIRELL								
	Date Requi	red									
	Ship Code *		923 - NEW LO	CATI**** CENTRAL RECE	IVING	NEW LOCA	ATI**** CENT	RAL			
	Comments		EXAMPLE OR	DER DO NOT FILL							
	ltem	Stock	Number	BUDGETCODE	Account	PROJECT	Account	Qu			
	1	15247	0	1997510092399063	6399						
	2										

And that is all there is to it. If you get stuck or have a question contact Jennifer Hairell x5449 or Robert Taylor x5541. We will be happy to help you out. TIP: Did you forget something or want to change something or want to make sure your request went through – do the following:

From Warehouse Administration page click on Requests.

You can enter any of the following: the request number, date or the ship code or you can leave them all blank. Hit find.

### For this example I entered the date requested and our ship code.

https://cstfinapp2.csisd.org/gas2.50/wa/sua/57a327a64724e28cf3a058020d795c8f/23											
	ancePL S 360 Ap		st - CSISD 5.1 Par	allel - 11/08			JENNIFER HAIF				
Add Item	Exceptio	on Fill Delete Item Print F	Requests Una	pprove							
⊕ <sup>†</sup>		🚳 💩 🔊 🖾	合 合	◇ 🖻 ★							
Date: 11/15/2016 ]	Date: 11/15/2016 Period: 2/17										
Search Crite	ria										
Request Numb Request Year Warehouse Date Requested Requested By Date Required Ship Code Comments	d 11/15/	16 NEW LOCATI**** CENTRAL RECEIN		ced							
Request N	Year	Warehouse	Date Reques	Ву	Date Required	Ship Code	Comments				
115539	2017	WAREHOUSE	11/15/2016	JHAIRELL	11/15/2016	923	EXAMPLE ORDER DO NOT FILL				

eFinance will pull up all the requests related to the information you gave.

If you want to edit the request or check what was ordered double click on the request. Click OK and you will be able the items you ordered. If you want to add an item(s) to the order: Click the order only one time and click on Add Item at the top of the page. See above.

If you see a box like the picture below that means we have already processed your order and it cannot be edited not even by us. eFinance will not let you see your order at this point. If you have questions, please contact Robert Taylor or Jennifer Hairell for help with your order.

https://cstfina	pp2.csisd.org/	gas2.50/wa/sua/57a32	7a64724e28ct3a05	8020d795c8f/26					
	S 360 Application	n Change Re	quest - CSISD 5.1	Parallel - 11/08				JENNIFER I	HAIRELL 🤷
<b>•</b>		- 6 N G	3						()
Date: 11/15/2016 ]	Period: 2/17								
Request Number	* 115539		Continu	ous					
Request Year	2017 💌								
Warehouse *	923 - WAREH	IOUSE	*						
Date Requested	11/15/2016								
Requested By	JHAIRELL								
Date Required	11/15/2016								
Ship Code *	923 - NEW L	DCATI**** CENTRAL REC	EIVING	•					
Comments	EXAMPLE O	RDER DO NOT FILL							
Item Sto	ck Number	BUDGET CODE	Account	PROJECT Warning	Quanti	Price	Status	Receive Date	Back Order
			1	There are no unfilled or u items that may be change					
				ОК	_				