

Entering Requisition to order

FINANCIAL MANAGEMENT PURCHASING REQUISITIONS:

REQUISITION MASTER INFORMATION

**CLICK ON ADD (or ADD from Online Catalog, INSTRUCTIONS BELOW)
SELECT REQUISITION GROUP (AUTO POPULATE FOR YOUR GROUP)
SELECT FISCAL YEAR (DEFAULT TO CURRENT YEAR)**

Requisition Group: Should auto populate for your area.

Fiscal Year: Should auto populate for the current year.

Batch Number: Enter your initials

Description: Enter a description IE: (SUPPLIES/AHS/LBRY) (6 DELL COMP/SPEC ED/AHS)

Enter Vender: You may put your cursor into the vendor drop down and start typing. If the vendor is loaded it will allow you to select it.

Ship to: School District of Ashland

Attn: Type person who is to receive product and building (LSP, LSI, MVS, AMS, AHS, DO)

Due Date: Today's date

PO Date: Today's Date

Ship Date: Today's Date

Ship Via: not necessary

Click on the **Save and Add Detail** top right corner **OR**

Save and Mass Add Detail – allows you to enter several line items at once.

Back will take you out of the PO Setup information area.

Line number: Leave as is

Line Type: Leave as is

Catalog: Enter for your item # or Catalog #. If you enter this it will keep track of the item so next time you order same product you will not have to type the description

Quantity: Enter the number of items needed

Unit/Measure: Enter the size (each, doz., Unit)

Unit Cost: Enter amount of each

Description Item Name/short

Save button on the right side of the page if you are done entering Items.

Add button on the right-side page, if you have more items to enter the rest of your items.

Edit: clean up items you have already entered.

Delete: remover items you do not want.

Mass Add button on the right-side page, if you have several items to enter.

Add Requisition Account: Click to add the account coding.

A list of account numbers will appear.

If you see your account number Check the box next to the number

Account Number: (Center/Midway down) if you do not see your number start typing the number in. If you are using a grant code and do not have access, please enter your main account code.

If the full requisition is applied to this code click **Save Account Distrib.**

If you want to break between two or more accounts, just add the coding and the \$ amount for each account. Then click **Save Account Distrib.**

This will bring you back to **requisitioning detail lines/Accounting.**

You are now back to your main Purchase order entry form and you can look it over to make sure it is the way you want.

Use the **ATTACH** button to ATTACH any Invoices, quotes, or emails associated with the purchase

On this main page you may add notes about your requisitions such as an account code that is not shown. **NOTES on RECODE REQUEST**

Requisition Detail Lines/Accounting
Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **PG**
Requisition Number: **0000058229** Accounting: **Account allocation by total requisition amount.** Edit Master
Group: **(100) LSE KNDGRTN** Amount: **50.00** Notes
Fiscal Year: **2023 - 2024** Ship To: **SCHOOL DISTRICT OF ASHLAND** Attachments
Vendor: **MACGILL & COMPANY**
1000 N LOMBARD ROAD Description: **test**
LOMBARDI IL 60148

Requisition Accounts

Requisition Accounting

Account Number ▲	Account Amount	Account Percent	Over Budget
10 E 100 411 110000 000	\$50.00	100.00%	

Update Account Distrib
View Requisition Detail Lines
Add Asset Detail

Last: If you need to make any changes or add any other items you can still do this by using the **Add** button to add another item. **EDIT** button to change any line item, just highlight the item that needs changing and click the **EDIT** button.

If you need to change the account coding or would like to view it click on the **View Requisition Account** button at the right. Press Remove to the right of the unwanted code, and retype your corrected code.

If you are done click on one of the following: **Submit for Approval or Save and Finish Later. Back button will take you back without saving any of your work.**

If you have more Requisitions to add, click on **ADD** and start another requisition.

Entering Requisition Orders from Online Catalogs

Add from Online Catalog:

Click on the Store you would like to order from.

Fill in the requisition information as listed above.

Click Save and Add Detail: This will take you out to the online store and you build your cart with the products you would like.

When all items have been put into your cart go to your cart.

Check over your items.

Click proceed to checkout.

Will auto fill all district information - Click – **Use this payment method**

You will get a message: This order requires approval. **Click Submit order for approval**

Your order will be brought back into Skyward and you can review it there again.

Now complete your order as listed above with: Add Requisition Accounts.

ATTENTION FIRST TIME AMAZON ECOMMERCE USERS!

If you have made an amazon account with your district email address, the process will **NOT** work in Skyward. The first time entering information for checkout in Amazon, you may be required to put your information in. The information will be the District Office address and phone number and your school email, and your orders will be directly linked to our district account.

Once you submit your cart, the application will guide you back to Skyward where you will then enter your requisition account codes and submit for approval.

If you receive a notification that an order has been canceled through Amazon, It will be ordered manually by our Accounts Payable. ext:6007