

Union Public Schools



Purchasing Reference Guides & Materials

Admiral Express

Fun Express/Oriental Trading

E-Procurement/Munis Punchout

Munis Receiving

Furniture & Standards Policy

Purchasing Policies

Munis Tips



Admiral Express

Account & Order Procedures

Effective immediately, the process for placing Admiral Express orders has changed.

➤ **Admiral Express Accounts**

- Each school and department will have only **one (1) account** for all orders, e.g. Boevers Elementary will have one account, Athletics will have one account, etc., regardless of the number of open blanket purchase orders.
- Your Admiral Express account will have your school's or department's four-digit MUNIS department code referenced on it.
- Unless you hear otherwise from Stacy Haynes in Purchasing, your existing user ID and password will remain the same.

➤ **Blanket Purchase Orders**

- Schools and departments may have multiple blanket POs to Admiral, but only one blanket PO may be used per order. You cannot use more than one PO per order.

➤ **Referencing Your Blanket PO on the Order**

- To place an order, login to your account, select the items you desire to purchase, and enter the corresponding blanket purchase order in the Long PO field.

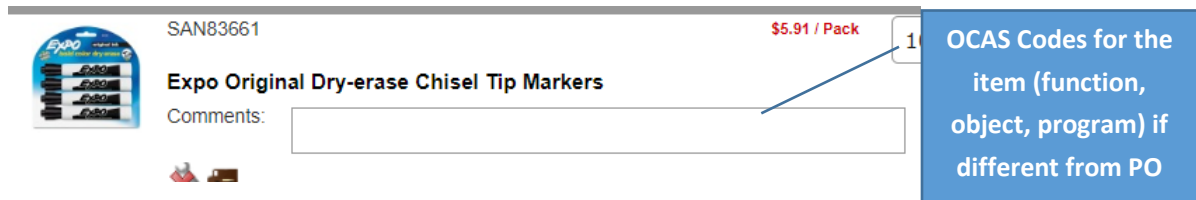
The screenshot shows a form titled "Specify Purchase Orders" with two input fields: "Long PO:" and "Short PO:". To the right of these fields is a blue button labeled "Enter PO Number".

➤ **New Coding Requirements**

- On the "Comments:" line for each item, you will need to enter the correct corresponding OCAS code (function, object and/or program code(s)), if the items or use of the items will differ from the OCAS code on the blanket.
- If you are using the items for gifted or special education, you will need to add the corresponding program code. For example, if you are purchasing dry-erase markers for

use in a special education classroom, you will need to use the object and programs code 0619.239 (Special Ed.).

- If purchasing an item for non-classroom use, but not for the office of the principal, e.g. nurse, counselor, media, etc., you will also need to indicate the corresponding function code for that position. For example, if you are purchasing dry-erase markers for the media specialist, you need to indicate the following: 52220.0619 (office supplies for the media specialist/media center).



Need more OCAS help? Refer to attached handout.

➤ **Admiral Order Workflow**

- The purchasing department will no longer “review and approve” Admiral Express orders. Once you place an order, it will go directly to Admiral Express for processing.

➤ **Order Deadline**

- You must have your orders submitted to **Admiral by 4:30 p.m.** for next day delivery.

➤ **Tracking your Orders and Blanket PO Balance**

- You will be responsible for tracking your blanket PO balances and insuring that you do not exceed your blanket PO. The Admiral Express website **will not track** your PO balances. Use MUNIS! Look up your PO balances and keep a spreadsheet log of your orders.

➤ **What Not to Buy on Your Blanket PO**

- Office and classroom supply blankets must not be used to purchase the following: furniture (including chairs); durable equipment over \$100; food.

➤ **Questions**

- Admiral Account – Stacy Haynes, Purchasing, 918-357-6167
- Accounts Payable – Debbie Driggers, Accounts Payable, 918-357-6075



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Oriental Trading® Company

Enjoy Corporate Pricing with Oriental Trading® through Fun Express.
Your benefits include:

20% OFF
Oriental Trading®
catalog prices

+

FREE
SHIPPING
on orders \$125+



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Art & Craft Supplies
Crafts, including DIY Projects
Camp Supplies
Educational Resources
Active/Dramatic Play Items

Toys and Novelties
Seasonal Products
Themed Products
Event & Party Supplies
Games, Candy and More!

Place orders online, by phone, fax or email to receive discount.

NEW website to shop
discounted prices

Website:

FunExpress.com/corporate

Email:

Orders@FunExpress.com

Phone:

800-228-2003

Fax:

800-228-1002

To create your
account call or
go online at:

Jeannie Carlsen
Business Development Representative
Direct: 877-619-8497
JCarlsen@FunExpress.com

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9/21/2020

Union Finance

E-Procurement Manual & Instructions

By Julie Harkrider & David Young
ACCOUNTS PAYABLE & PURCHASING



E-Procurement

What is e-Procurement? E-Procurement is short for “electronic procurement.” It allows for the electronic transfer of procurement data between the District and the supplier. MUNIS has the capability to “punch-out” data from a supplier’s website catalog and bring that data into the MUNIS requisition. When using e-Procurement, the description, quantities, and price within the supplier’s catalog are electronically transferred into the MUNIS requisition, thus saving you time, while increasing the accuracy of the transaction with the supplier, i.e. the exact item numbers, descriptions and price are all pulled in from the supplier’s catalog.

Once the requisition is converted into a purchase order, the purchase order is electronically sent, via the Internet, to the supplier. In short, Union’s MUNIS application “talks” directly to the supplier’s application. You don’t have to email, fax or phone in your orders to the supplier – it’s all done electronically. Unfortunately, not every supplier will have the capability of using e-Procurement. The District’s Purchasing and Accounting Departments will continue to add major suppliers to the system, as supplier set-up data becomes available and is successfully tested.

Now that you have a better understanding of e-Procurement, let’s start the requisitioning process.

<u>PAGE #</u>	<u>Description</u>
2	Starting the Requisition
3	Selecting your Vendor
4	Completing the Requisition
5	PO Printing
6	NOTES
7	CDW-G instructions
11	School Specialty instructions
15	School Specialty Cart Creation by Teachers
18	School Specialty Cart Retrieval by Munis Users

Starting the Requisition:

An e-Procurement requisition starts just like a normal requisition. From the Tyler Menu =

Munis-Financials-Purchasing-Purchase Order Processing-Requisition Entry

- (1) Enter Header information in Requisition Entry. “Receive by” shall always be ●Quantity. When an E-Procurement (E-Pro) vendor is desired, always use **PO Mailing address ‘0’** and the Delivery method will be E-Procurement:

Vendor Information

Vendor: 166143 ... ☐ Committed

Name: CDW LLC

PO mailing: 0 ...

300 N. MILWAUKEE AVENUE

VERNON HILLS IL 60061

Delivery method: ☐ Print ☐ Fax ☐ E-Mail ☒ E-Procurement

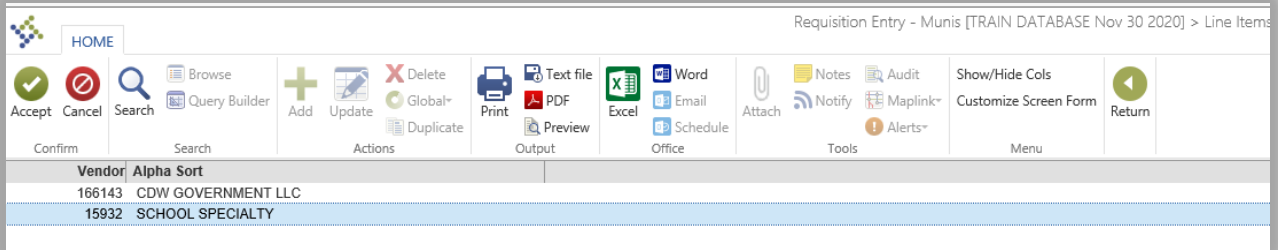
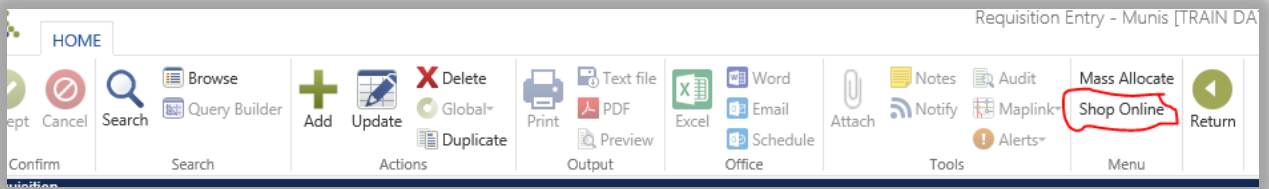
Remit: 1 ... CDW GOVERNMENT LLC

Vendor/Sourcing Notes Vendor Quotes (0)

Line Items

If you do not want to use e-procurement for an e-pro vendor, MUNIS will not allow you to uncheck the E-Procurement box and check a different box. You must select a different PO mailing address (one of the Remit addresses) as a designated Purchase Order address for the vendor. Once the vendor delivery method has been selected, if you need to change it, you will have to update the PO mailing with a different address. **CAUTION:** If you change the PO mailing on the front screen and you already have line items entered, you must change the PO mailing on each line item as well.

- (2) *After entering all the necessary Header data, go to the Line Items screen. In the ribbon, you will now see an option to 'Shop Online'. Select 'Shop Online' to see a list of E-Pro vendors:*



- (3) *Select vendor from list. This will launch the vendor's website.*

*NOTE: If you select a vendor in error, just close out of the vendor's website. You will be returned to your requisition in MUNIS, **click on CANCEL in the ribbon**, then you can select 'Shop Online' again to return to the vendor listing.*

Refer to the following pages for specific steps to order via E-procurement from these vendors:

- **CDW-G:** page 7
- **School Specialty:** page 11

- (4) *Continue to the next page once you have completed the 'Shop Online' steps for the specific vendor.*

Completing the Requisition:

- (1) Click 'Continue' to populate all items from shopping cart:

- (2) In this example, two items were in the vendor shopping cart at checkout. After clicking 'Continue', Munis now has all line items populated from the shopping cart from the vendor's website:

Line 1 of 2:

Line 2 of 2:

DO NOT UPDATE ANY LINE-ITEM DATA ELEMENTS. Changing any quantities, pricing, and/or descriptions will cause the PO submission to the vendor to fail. Each line item now must be updated only with the appropriate OCAS code. Follow normal Requisition protocol. You may add any necessary additional information only to the General Notes on the Header screen.

- (3) If you click 'Return' without adding the GL account (OCAS code), the requisition will show it is in a 'Created' status, not an 'Allocated' status:

The screenshot displays the Munis Requisition Entry interface. The top ribbon includes options like Confirm, Search, Add, Update, Duplicate, Print, Text file, PDF, Excel, Word, Email, Attach, Notes, Audit, Maplink, Switch Form, Line Items, Activate, Mass Allocate, Release, and Return. The 'Main Information' section shows the requisition is in 'Created' status, with a 'Created' date of 09/06/2019. The 'Vendor Information' section shows the vendor is CDW LLC. The 'Shipping Information' section shows the ship to address is UNION PUBLIC SCHOOLS I-009. The 'Line Items' table has two items, both with 'No GL Accounts found.' in the '1st GL Account' column. A red box highlights this column header and the data for both items.

Line	Inv tran type	Description	Vendor	Qty	Unit Price	Freight	Disc %	Credit	Line Total	1st GL Account
1		ITEM: APC Back UPS 650VA UPS Supplier Part No: 25	(166143) CDW LLC	1.00	81.49000	0.00	0.00	0.00	81.49	No GL Accounts found.
2		ITEM: Fellowes High Security Shredder Lubricant	(166143) CDW LLC	1.00	9.37000	0.00	0.00	0.00	9.37	No GL Accounts found.

You must go back to each line and add the appropriate GL account. Once fully allocated, release to workflow as usual. If all line items use the same OCAS, you may use the "Mass Allocate" option in either the Line Items ribbon or the Header ribbon. Enter the OCAS one time, select "Process" and "Return." All line items are now assigned the same OCAS account. After Mass Allocating, you may update an individual line item's OCAS if an Object Code or a Function Code needs to be changed.

For example, if most of the items in your order are basic classroom supplies, but you also have a ream of paper in the order, you may "Mass Allocate" one OCAS code using object code 0619. Then update the one line item for the paper and change the object code on that line to 0611.

- (4) When the PO is printed, it will be sent electronically to the vendor. The school district copy will be available in TCM on the PO record in Munis.

NOTES:

District protocol has been to type all data into Munis using only upper case letters. You will notice that E-Procurement uses both upper and lower case lettering. This will not cause problems processing the requisition/purchase order.

There is no need to scan quote attachments to e-procurement requisitions for orders under \$10,000. For orders over \$5,000, please type the Contract # - from your quote - in General Notes on the REQ.

CDW-G Search CDW...

HARDWARE SOFTWARE SOLUTIONS CLOUD BRANDS BLOG DEALS

Union Public Schools

Union Public Schools Online Catalog
Welcome to the Union Public Schools Online Catalog! This site will provide account information, product offerings, and contract pricing on over 150,000 of the top technology products and services in the industry. CDW's just-in-time inventory model and multiple distribution centers will ensure you have the products and solutions you need when you need them.

If you need assistance or have product related questions please contact your CDWG Account Manager:

Rob Culicchia
CDW-G Executive Account Manager
Toll-Free: (866) 5341410
Email: robcul@cdw.com

Find my Quote: **Find It**

Find my Order: **Find It**

PLEASE NOTE: The sale of Apple products is prohibited through this site.

To place an order via an account manager generated quote:

- Enter your quote number in 'Find my Quote' and click 'Find' to retrieve your quote
- Click the 'Add to Cart' button next to your quote
- Continue shopping or Click on 'Transfer Cart' to return to the e-procurement system

To find order status, tracking information, and other order related information:

- Enter your order number or PO number in 'Find my Order' and click 'Find' to retrieve your order

When navigating, click on the CDW-G logo in the upper left hand corner to return home.

Contacts

Robert Culicchia - **IN**
Sr. Account Manager
Phone: 866-534-1410
Email: robcul@cdw.com

IMPORTANT

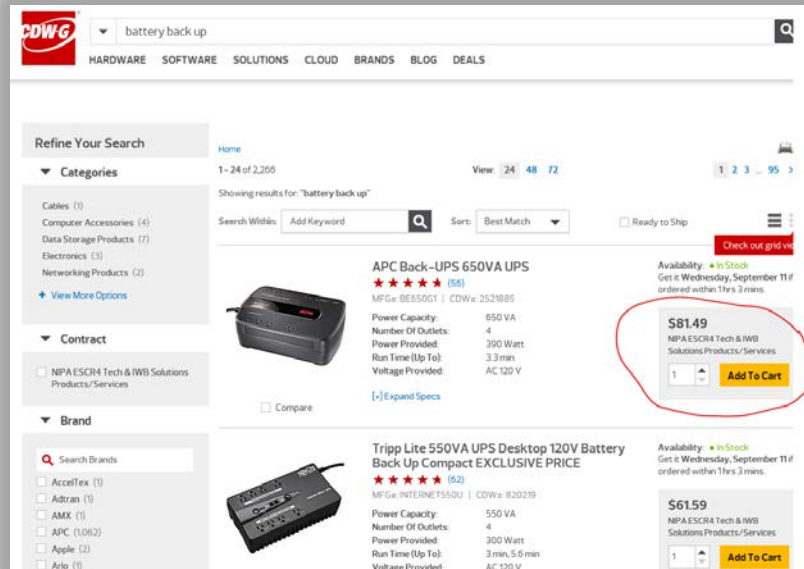
Please enter the CDW-G OMNIA contract number – R160201 – in the General Notes of your REQ and make sure it is checked to Print on PO.

Ways to shop:

- *Search the District-approved catalog items, or*
- *Enter a previously obtained quote in the 'Find my Quote' field.*

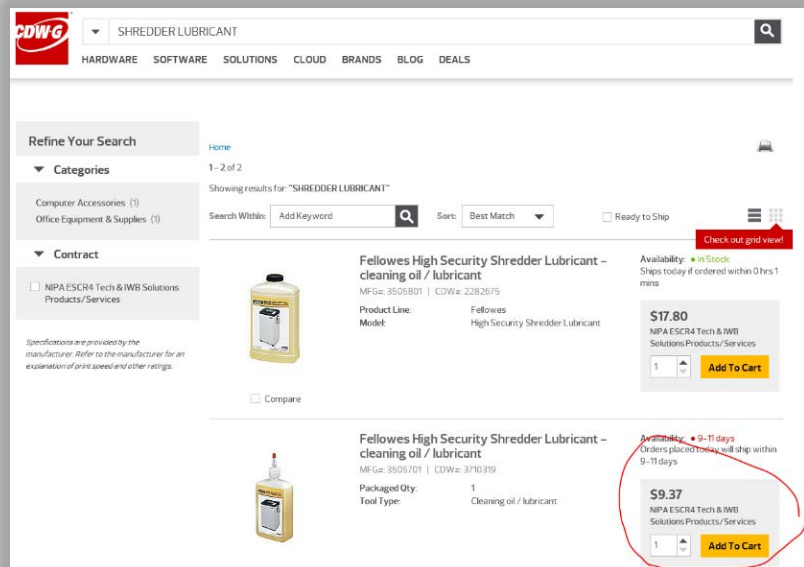
To shop for items, use the Search bar, or select the desired category at the top of the page.

Example 1: Search for “BATTERY BACK UP”:



For desired items, click 'Add To Cart'.

Example 2: Search “SHREDDER LUBRICANT”:



Once all desired items have been added to cart, click 'Checkout':

From SHOPPING CART:

CDW Search CDW...

HARDWARE SOFTWARE SOLUTIONS CLOUD BRANDS BLOG DEALS

[Continue Shopping](#)

Shopping Cart

[Email Cart](#)

Add Item to Cart
Enter CDW # or MFG # [Add](#)

Item	Availability	Price	Quantity	Item Total	
 APC Back-UPS 650VA UPS MFG Part: BE650G1 CDW Part: 2521885 UNSPSC: 26111701	In Stock Get it Wednesday, September 11 if ordered within 0 hrs 50 mins.	\$81.49 NIPA ESCR4 Tech & IWB Solutions Products/Services	1	\$81.49	
 Fellowes High Security Shredder Lubricant - cleaning oil / lubricant MFG Part: 3505701 CDW Part: 3710319 UNSPSC: 44103107	9-11 days Orders placed today will ship within 9-11 days	\$9.37 NIPA ESCR4 Tech & IWB Solutions Products/Services	1	\$9.37	

[Email Cart](#) [Update All](#) [Remove All](#)

Order Summary

Subtotal: \$90.86

Tax and Shipping calculated at checkout.

[Checkout](#)

Follow the instructions on the next screen:

CDW The Right Technology. Right Away.™

Transfer Shopping Cart

Thank You for shopping at CDW!

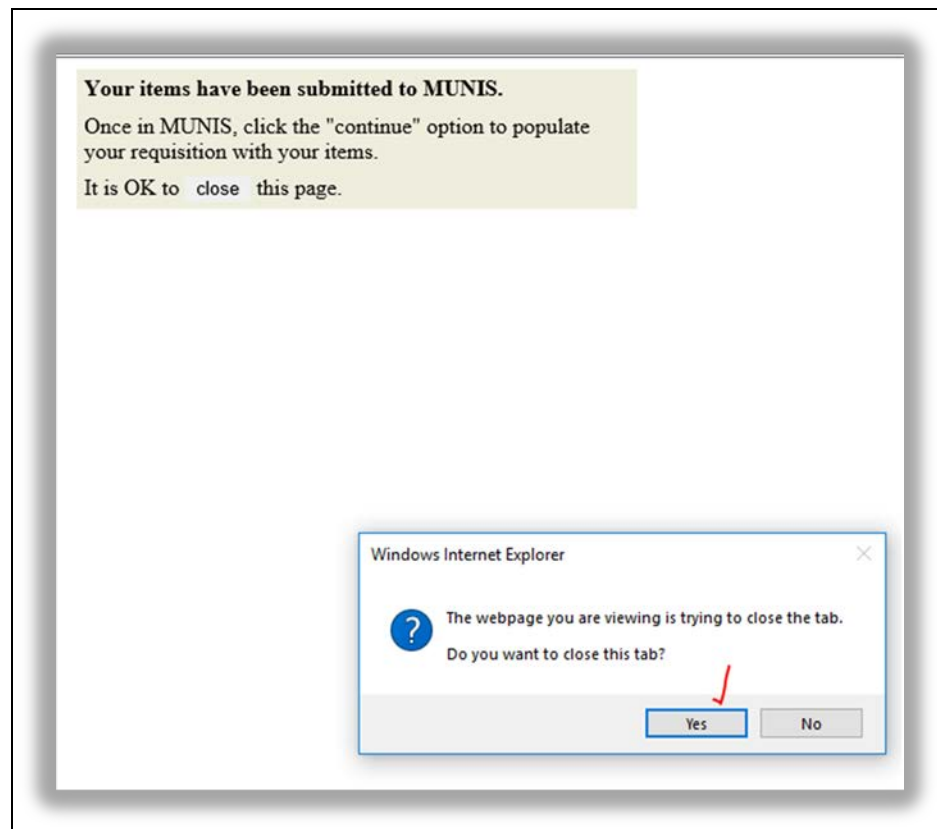
Please click the "Transfer Shopping Cart" button to transfer your CDW shopping cart.

[Transfer Shopping Cart](#)

Please **do not** click on the back button on your browser at this time. Doing so will erase your shopping cart.

Final invoice might include an environmental [recycling fee](#) for certain products shipped to certain states.

The following message will appear after clicking 'Transfer Shopping Cart'. Click .



Click 'Yes' to return to Munis.

(Return to page 4 of this document to continue Munis instructions.)

School Specialty

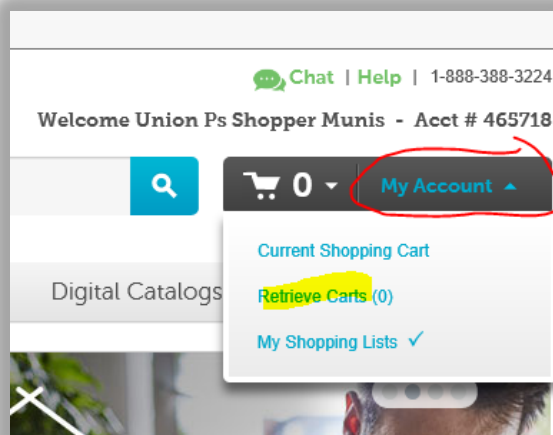
IMPORTANT

Please enter the School Specialty OMNIA contract number – R190503 – in the General Notes of your REQ and make sure it is checked to Print on PO.



Ways to shop:

- *Search the District-approved catalog items, or*
- *Search for a previously created Cart by accessing the drop-down menu from 'My Account' in the upper right corner:*



(Specific instructions on creating a cart and then retrieving the cart start on page 15.)

NOTE ON FREIGHT/SHIPPING CHARGES WITH SCHOOL SPECIALTY:

THERE IS A \$50 MINIMUM ORDER FOR E-PROCUREMENT ORDERS WITH SCHOOL SPECIALTY.

Small orders less than \$50 or bulky items that require freight charges cannot be ordered through e-procurement, and must be entered manually using a different PO delivery method.

Once all desired items have been added to cart, click 'Proceed to Checkout':



Chat | Help | 1-888-388-3224

Welcome Union Ps Shopper Munis - Acct # 465718

PRODUCTS search

1 My Account

Shop Our ProductsA+ DealsIdeas & ResourcesDigital CatalogsOrder by Number

Your Shopping CartPrint

 Shopping Cart  Review  Confirmation

Cart Number: 7792649195 [Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Proceed to Checkout](#)

Due to COVID-19 shipping industry restrictions, orders may be temporarily delayed. We are exploring every alternative to expedite your order. To check the status of your order or for info about urgent orders, please contact Customer Care.

Shopping CartPromotion CodesItem Availability

Remove Selected Rows

Line	Remove	Ordered Item	Item Number	Description	Qty	UOM	Unit Price	Total Price
1	☐	1080627	1080627	PAPER COPY 20# 11X17 WE	1	EA	Catalog:\$29.49 Disc: -\$7.37 Net:\$22.12	Catalog:\$29.49 Disc: -\$7.37 Net:\$22.12

Remove Selected Rows

Update Order Total | Subtotal: \$22.12

Shipping and Tax have not been finalized. [Click here to calculate.](#)

Save to Shopping List

[Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Proceed to Checkout](#)

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The use of the website is conditioned upon the acceptance of the Terms & Conditions, User Agreement, Privacy Statement and Social Media Statement.

Verify your items and make sure no Shipping charges have been applied, then select 'Submit':



Chat | Help | 1-888-388-3224

Welcome Union Ps Shopper Munis - Acct # 465718

PRODUCTS search

1 My Account

Shop Our ProductsA+ DealsIdeas & ResourcesDigital CatalogsOrder by Number

Review

Shopping CartReviewConfirmation

Cart Number: 7792649195

[Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Submit](#)

Due to COVID-19 shipping industry restrictions, orders may be temporarily delayed. We are exploring every alternative to expedite your order. To check the status of your order or for info about urgent orders, please contact Customer Care.

Shopping Cart

Line	Ordered Item	Item Number	Description	Qty	UOM	Unit Price	Total Price
1	1080627	1080627	PAPER COPY 20# 11X17 WE	1	EA	Catalog: \$29.49 Disc: -\$7.37 Net: \$22.12	Catalog: \$29.49 Disc: -\$7.37 Net: \$22.12

How can I receive free shipping?

Sub Total: \$22.12
Shipping and Handling: \$9.95
Sales Tax (0%): \$0.00
Modify Line Items | Total: \$32.07

[Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Submit](#)

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The use of the website is conditioned upon the acceptance of the Terms & Conditions, User Agreement, Privacy Statement and Social Media Statement.

Click on 'Transfer':





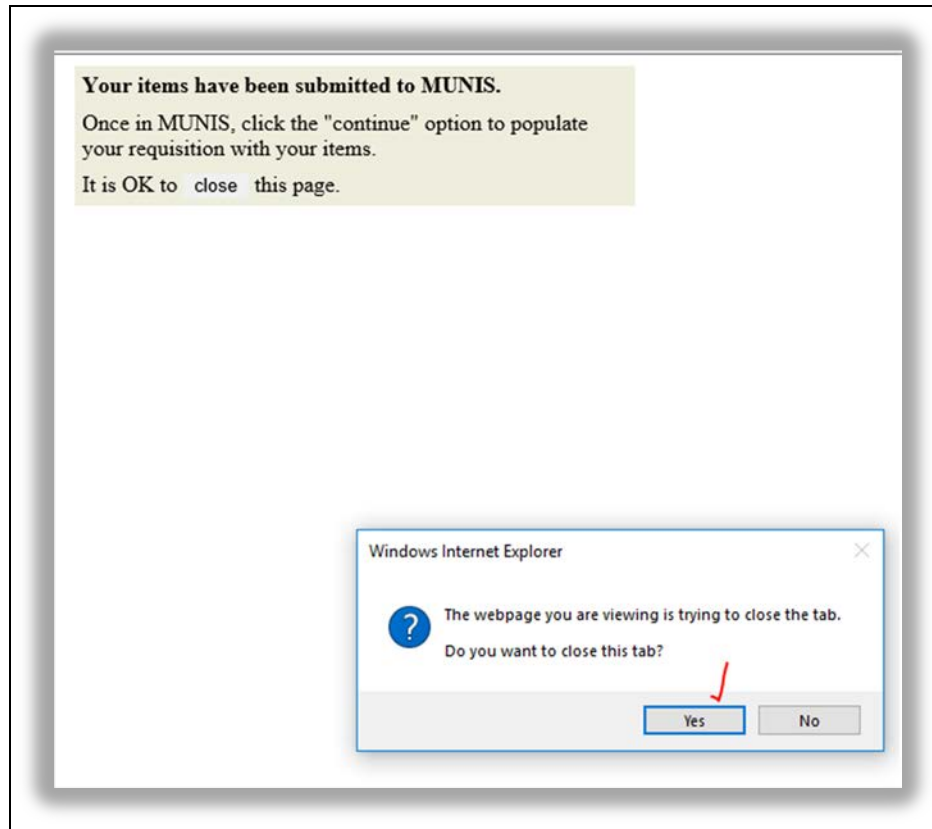
Thank You for Shopping With School Specialty!

Your requisition is ready. Press the "Transfer" button below to transfer your requisition information to complete your order.

Transfer

The following message will appear after clicking 'Transfer'. Click

close



Click 'Yes' to return to Munis.

(Return to page 4 of this document to continue Munis instructions.)



Cart Retrieval: This process allows teachers to create shopping carts that can be retrieved, reviewed, and approved by the administrator in Munis! The process is simple, secure, and no orders can be processed without review and approval. Instructions for teachers to create carts are below.

Teacher Cart Creation

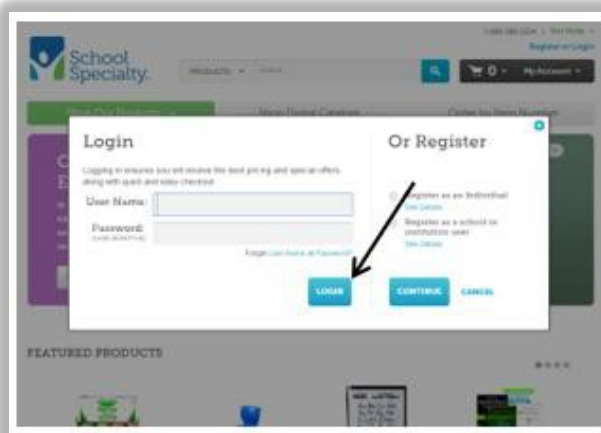
A **video** of the process to navigate the School Specialty shopping website is linked here:

<https://www.youtube.com/watch?v=KI505A0G8Ds>

You may find it helpful to view this video before logging in for the first time.

To create your shopping cart:

- Go to: <https://store.schoolspecialty.com>
- In the upper right, click **Welcome, Login**
- Enter your User Name and Password, click **Login**. (Each site – not individual – should have a unique User Name and Password.)



Choose one of 5 easy ways to shop:

1. Search by Key words under the **Search** window
2. **Shop our Products** by category
3. **Order by Item Number**
4. **Search Digital Catalogs**
5. Previously created **Shopping Lists** which can be found under the **My Account** menu



From the **Shopping Cart** screen (below) under **(1) Shipping Information**, enter your name by clicking **Review Attention To**, then enter your **(2) Request Ship Date** using the calendar icon. (Leave the **PO Number** blank.)

(3) Save your cart if you are not finished (you will be able to complete at a later time).

Cart Number: 7792654692

[Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Proceed to Checkout](#)

Due to COVID-19 shipping industry restrictions, orders may be temporarily delayed. We are exploring every alternative to expedite your order. To check the status of your order or for info about urgent orders, please contact Customer Care.

Shopping Cart

Promotion Codes

Item Availability

[Delete Cart](#) | [Save Cart](#) | [Save to Shopping List](#)

Remove Selected Rows

Line	Remove	Ordered Item	Item Number	Description	Qty	UOM	Unit Price	Total Price
1	☐	245787	245787	PENCILS COLORED SCHOOL SMART SET OF 12	10	EA	Catalog: \$1.99 Disc: -\$0.50 Net: \$1.49	Catalog: \$19.90 Disc: -\$5.00 Net: \$14.90
2	☐	075479	075479	EXPO ERASER W/PRECISION POINT REPLACEABLE PAD	1	EA	Catalog: \$11.19 Disc: -\$2.80 Net: \$8.39	Catalog: \$11.19 Disc: -\$2.80 Net: \$8.39
3	☐	1593064	1593064	HIGHLIGHTER TANK SCHOOL SMART YELLOW PACK OF 48	1	EA	Catalog: \$23.99 Disc: -\$6.00 Net: \$17.99	Catalog: \$23.99 Disc: -\$6.00 Net: \$17.99
4	☐	1593068	1593068	HIGHLIGHTER TANK SCHOOL SMART ASSORTED SET OF 48	1	EA	Catalog: \$23.99 Disc: -\$6.00 Net: \$17.99	Catalog: \$23.99 Disc: -\$6.00 Net: \$17.99

Remove Selected Rows

Update Order Total

Subtotal: \$59.27

Shipping and Tax have not been finalized. [Click here to calculate.](#)

[Delete Cart](#) | [Save Cart](#) | [Save to Shopping List](#)

Approval Details:

Approval Limit: \$0.00

Approvers: UNION PS SHOPPER MUNIS

Shipping Information

Location: UNION PUB SCHL WRHSE & DISTRB CTR
Attention To: HARKRIDER, JULIE [Review Attention To](#)
Address: 5526 S 129TH EAST AVE, TULSA, OK, US

* Request Ship Date

Choosing a date confirms availability to accept shipments at the shipping address specified. Select today's date for at-once shipping.

6-OCT-2020 (DD-MON-YYYY)
Items with this icon will ship next day unless future ship date is selected.

Shipping Instructions

These instructions only apply to Truck / Freight shipments and will not be available on Parcel shipments.

☐ Call 24hrs prior to delivery

Billing Information

Customer: UNION PUBLIC SCHOOLS
Address: 8506 E 61ST ST, TULSA, OK, US

PO Number

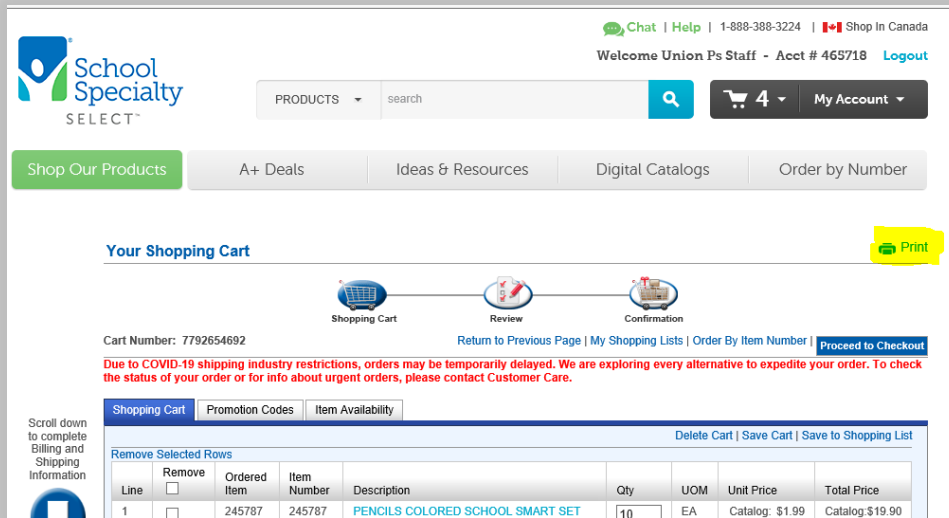
If you have a purchase order, please enter that number here; otherwise enter some other reference to identify this order:

Payment Information

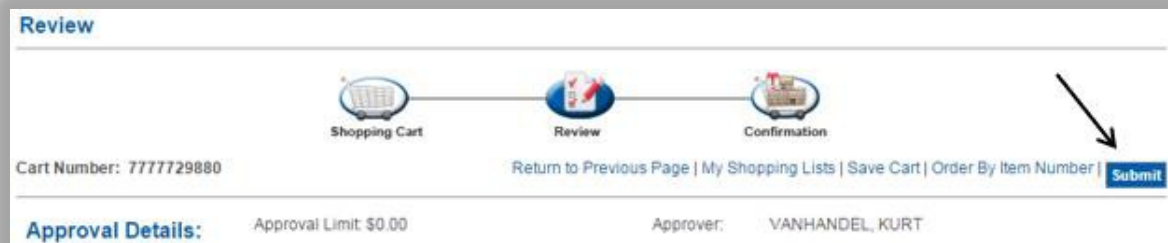
[Return to Previous Page](#) | [My Shopping Lists](#) | [Order By Item Number](#) | [Proceed to Checkout](#)

If complete, click the **Print** icon (see next screen shot) to save a PDF copy of your cart and email it to your site secretary/financial clerk so they know there is a cart for approval and they will have the cart number.

Then click **(4) Proceed to Checkout**, to be taken to the **Review** page.



From the **Review** page, click **Submit**. Your cart will now be available to your Munis User to pull in to a requisition.



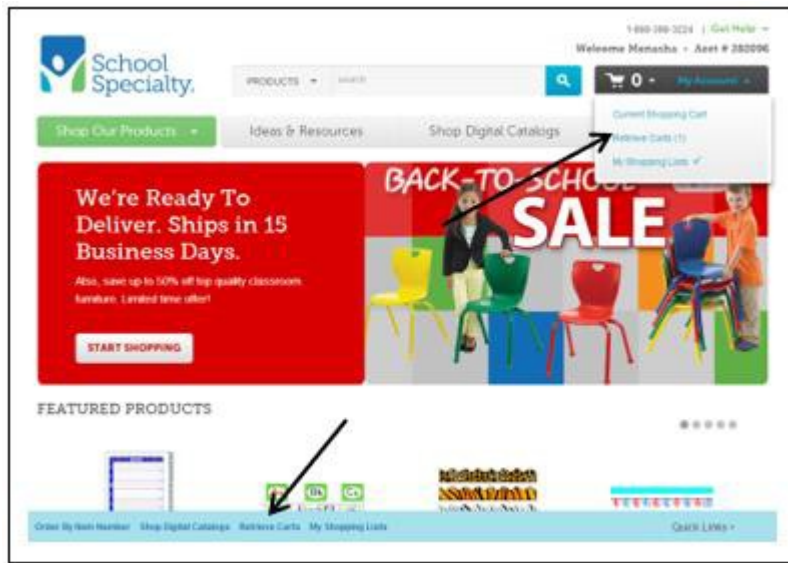
You may now log out of the website.

NOTE: IF YOU DO NOT CLICK 'PROCEED TO CHECKOUT' AND 'SUBMIT', YOUR CART WILL NOT BE AVAILABLE FOR YOUR SECRETARY TO ACCESS FROM MUNIS.

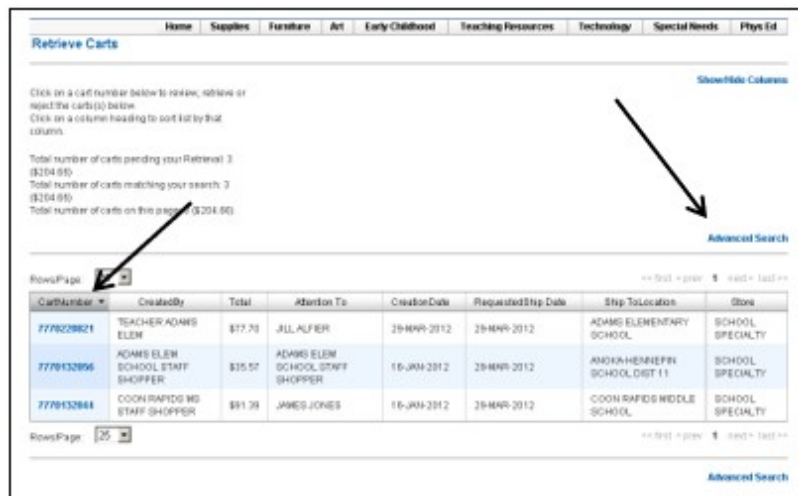
Cart Retrieval in Munis

(For site secretaries and financial staff responsible for entering requisitions in Munis)

From your Munis requisition line item, click 'Shop Online' to launch to the School Specialty landing page, and click **Retrieve Carts**:



Locate and click the desired **Cart Number**. You can use **Advanced Search** to search by cart number.



Click **Retrieve** to bring the order directly into the Munis requisition. (If necessary, choose **Modify This Cart** to make changes first. Then, **Proceed to Checkout** and **Submit** to bring the order into Munis.)

Shipping Method

Ground

Items can only be shipped GROUND. First Day and Second Day are currently not available online.

Orders must be entered before 2PM Eastern if the Order is going to ship today.

* Request Ship Date

29-Mar-2012

P.O. Number

JUL ALFER

Payment Information

Payment Type:

Shipping Cart

Line	Ordered Item	Item Number	Description	Qty	UOM	Unit Price	Total Price
1	1354110	1354110	GLUE ALL NEW IMPROVED 1.25 OZ	5	EA	Net \$0.99	Net \$4.95
2	023136	023136	GLUESTICK ELMER'S WASHABLE .77OZ	3	EA	Net \$1.29	Net \$3.87
3	1293657	1293657	CRAYON CRAYOLA SLICK STICK TWISTABLE SET OF 12	4	EA	Net \$9.99	Net \$39.56
4	1354572	1354572	CRAYONS CRAYOLA TWISTABLES SPECIAL EFFECTS PACK OF 24	2	EA	Net \$4.39	Net \$8.78
5	077399	077399	MARKER BLACK FINE SHARPIE SET OF 12	1	EA	Net \$9.25	Net \$9.25
6	1054744	1054744	MARKERS WASHABLE FINE TIP MS-AVIS SET OF 8	1	EA	Net \$11.29	Net \$11.29

Sub Total:

\$77.70

Shipping and Handling:

\$0.00

Sales Tax (0%):

\$0.00

Modify Line Items | Total:

\$77.70

Return to Previous Page | Reject | Modify This Cart | **Continue**

NOTE: ONLY ONE CART MAY BE RETRIEVED PER REQUISITION.

Click **Transfer** to import your order into Munis:





Thank You for Shopping With School Specialty!

Your requisition is ready. Press the "Transfer" button below to transfer your requisition information to complete your order.

Transfer

(Return to page 4 to continue Munis instructions.)



Amazon Business User Instructions



Amazon

1. **Sign In:** You will receive an email to create your Amazon Business account. Use your work email credentials to sign in to your Amazon Business account.
2. **Create a Shopping List:** Name your Shopping List using the format 'Site Name – Date' (e.g., Ochoa – 2/25/25).
3. **Add Products:** Add the desired products to your Shopping List.
4. **Review Shopping List:** Any quantity adjustments can be made by clicking the **Edit Comment, Quantity & Priority** button and changing the **Needs** field.
5. **Share Shopping List:** Share your Shopping List with the Amazon Approvers group for approval. You must click **Send emails to all recipients** for Purchasing to be notified.
6. **Approval Notification:** The Purchasing Department will email you to either approve the Shopping List or recommend alternative products.
7. **Move Approved Items:** Add approved Shopping **List** items to your Shopping **Cart**. Download PDF of your shopping cart contents (see Required REQ Attachment under Additional Information). This file will be attached to your REQ.

MUNIS

8. **Start a REQ:** In MUNIS, start a REQ for Amazon Business (Vendor #18222) and set delivery address as your site. Enter delivery recipient in the reference field. Attach PDF file showing Shopping Cart contents.
9. **Shop Online:** Within the REQ, select 'Shop Online' button which is located on the line-item screen. Amazon Business will open automatically in your web browser.

Amazon

10. **Checkout:** Click on Shopping **Cart** (top right corner) and verify that the approved products are in your cart. Click 'Proceed to Checkout'.
11. **Shipping Address:** Confirm the shipping address. If the Union Warehouse is listed as the delivery site, note that Amazon will deliver to the address listed on the REQ.
12. **Submit Order for Approval:** Click 'Submit Order for Approval' which will return you to MUNIS.

MUNIS

13. **Update REQ:** When you return to MUNIS, you will need to select the 'Continue' button on the ribbon and your items will autofill in the REQ. Click 'Update,' enter the appropriate OCAS coding, and verify that the general description is appropriate.
14. **Release REQ:** Release the REQ into the MUNIS workflow for approvals.
15. **Purchase Order:** Once the REQ is fully approved and the purchase order is printed, Amazon will send you an email confirming the order has been placed.



Additional Information



Required REQ Attachment

The following attachment is required to be included with each requisition.

1. Shopping Cart Contents PDF which can be downloaded from your Amazon Shopping Cart (see screenshot below.)

The screenshot displays an Amazon Shopping Cart. The main item is 'Amazon Basics Everyday Paper Plates, 8.62 Inch, Disposable, 100 Count' priced at \$5.39. To the right, a red circle highlights the 'Download cart to PDF' button, which includes a download icon and the text 'Download your cart's contents to a printable PDF.' Below this, a 'Quantity Discounts to consider' section shows a 15% discount on the item. The cart subtotal is \$5.39.

Order Requirements

- There is a \$25 minimum purchase threshold. Please reach out to the Purchasing Department if you have a special or emergency purchase which is under the minimum purchase threshold.
- We recommend placing weekly instead of daily orders to reduce the number of purchases and packages.
- Amazon pricing is locked for **only** fourteen days. The price lock starts once the order is sent back to MUNIS for approval.
- Amazon has the following shopping cart maximums:
 - Up to **50** different items
 - Up to **999** units of a single item
- Lightning Deals **cannot** be purchased due to the time-sensitivity of the deal.
- Quantity updates may change your estimated delivery date.



Additional Information



Returns & Replacements

- Returns must be initiated by the purchaser. Start the return process by selecting “Return or Replace Items” under the “Your Orders” page on Amazon.com

Delivered March 7



(16 Pack) Pop Up Sticky Notes 3x3 in Post Accordion Stickies Super Sticking Power Memo Pads Bright Colors

Return or replace items: Eligible through April 6, 2025

\$8.95

Buy it again

Track package

Return or replace items

Print packing slip

Write a product review

Mark as received

Share gift receipt

Ask Product Question

Chat with us

- Select the option to return via United Parcel Service (UPS) and print the return label. **If a free return option is not available, contact the Purchasing Department for assistance.**
- Repackage items in original box and attach return label.
- On your site’s regular warehouse delivery date, request that warehouse staff take your Amazon return. The warehouse staff will coordinate with UPS for pickup.

Purchasing Department Contact Information: union.purchasing@unionps.org

Accounting Department Contact Information: accts.payable@unionps.org



12/4/2020

Union Finance

Purchasing & Supply Management

MUNIS Purchase Order Receiving

Standard Operating Procedure & Training Manual

David Young, Director of Purchasing & Supply Management

December 4, 2020

RECEIVING IN MUNIS PO RECEIVING

1. Documents needed

- Copy of the purchase order (PO)
- Shipping manifest, Bill of Lading, packing list/slip, delivery receipt/documentation (with date stamp or date received)

2. MUNIS Access

- <https://munis.unionps.org:55000/default.aspx>

3. Process

- If the items on the PO were received at the Union Distribution Center/Warehouse, you will not need to receive the items in MUNIS PO Receiving, but you can see if the items have been received.
- If the PO has line items, i.e. 1, 2, 3, 4, etc., PO receiving **must** be used. See **Table 1.** below for examples of when to use PO receiving.

Table 1.

Description	Receive		Comments/Examples
	Yes	No	
Blanket PO purchases		✓	
Tangible materials – line itemed on PO	✓		Supplies, equipment, furniture
Dues & Fees	✓		Institutional dues
Freight line on PO	✓		
Independent contractor services	✓		If 1-time payment
Media books/textbooks/classroom sets		✓	If not line itemed (> 10 items) ¹
Refunds	✓		
Reimbursements	✓		
Rentals	✓		
Services & Professional Development	✓		
Software & subscriptions	✓		
Travel/Hotel	✓		Yes, if not a blanket
Tuition & registrations	✓		After registration is complete
Warehouse shipments	✓		If line itemed on PO ²

¹ Textbook and book orders with less than ten (10) line items must be itemized on the REQ/PO. Receiving will be required, i.e. if line 1 has a quantity of 300, receiving will be required.

² Line item orders shipped to the Distribution Center will be received by the Distribution Center employees. Distribution Center employees will not receive orders shipped directly to other sites.

- If the PO is a blanket, you will not receive in Munis at this time. Instructions for PO Receiving by Amount will be rolled out at a later date.



- d. Open, inspect, count, compare and reconcile the items on delivery documentation/packing slips and lists against the items on the PO. Note any overages, shortages or discrepancies on both documents.
- e. Upon completion of the inspection, counts, and reconciling of the documents, leave the documents unstapled but batched together (scanning to follow).

4. PO Inquiry for Receiving

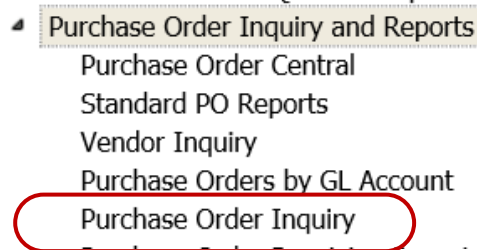
- a. To see if a PO has any Receiving records established, use the Purchase Order Inquiry process.

- b. Open MUNIS, click on Tyler Menu



- c. Find Purchase Order Inquiry and Reports

- d. Select Purchase Order Inquiry



- e. Select Search in the Ribbon and enter the PO number.

- f. Once the information is available in the Purchase Order Inquiry screen, you can quickly determine if there is receiving activity by the looking at Receiving icon. If the icon has a yellow folder, it is active.



- g. Click on the Receiving icon. You should now see the line items received. You will be able to see the line item, description from the PO, the date received, who received it, the quantity ordered and quantity received. (See example below)

Confirm	Search	Actions	Output	Office	Tools	Menu	
▲ Line	Description	Rec Date	By User	Ordered	Received	Amount	
001	USG2410 CEILING TILE,WHITE,5/8",8/BD	12/23/19	guest.quintin	65.00	65.00	3,203.20	

5. How to Receive

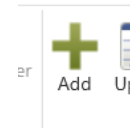
- a. Open MUNIS and click on Tyler Menu



- b. For Purchase Order Receiving, Select Financials > Purchase Order Processing > Purchase Order Receiving



- Purchase Order Processing
 - Item Order Form Requests
 - Requisition Entry
 - Requisition Approvals
 - Purchase Order Receiving**
 - Purchase Order Quick Receipt



c. In the Ribbon at the top of Purchase Order Receiving, click Add.

- 1) Enter the PO number you want to receive and the line number from PO. If you are receiving line item 1, enter line 1.

PO number 22000449 ... Purchase Order Inquiry Line # 001 ...
Vendor alpha EMPIRE PAPER

- 2) Using the receiving documents, enter the actual quantity received. The quantity received cannot be greater than the PO line quantity. Do not change the dollar amount.
- 3) Enter the actual date the items were received (packing slip receipt date), not the date this record is entered.

Quantity 20.00 Dollar amount \$400.00 Date 09/22/2019 x

- 4) Enter the packing slip/receiving document number and any comments, e.g. damages, overages, etc. If FedEx or UPS, enter the tracking number.

Packing slip# 123355 Fixed asset# ... By ...
Comments Partial shipment

- 5) **DO NOT** check the “Fully Invoiced” and “Close PO” boxes.

Received Details
Quantity Dollar amount Date
Packing slip# Fixed asset# By
Comments
Quantity invoiced
☐ Fully invoiced
☐ Close PO
DO NOT CHECK THESE BOXES



- 6) If all information is correct and accurate, click Accept in the Ribbon. (If you made an error, you may click Cancel before Accept and re-enter the information.)

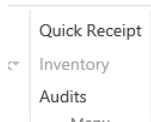


- 7) You may now proceed to enter the next line item. Repeat the process. If you have a freight line, you will need to receive the freight line.

- 8) Once all line items have been received in full, select the freight line number and receive it as well.

d. **Use of Quick Receipt**

- 1) There is an option to use **Quick Receipt**; however, when receiving all items (Select All) in Quick Receipt, the system does not allow users to enter a receipt date. The system receives on the date the transaction is entered; therefore, Quick Receipt is not recommended and must not be used for receiving all items. The date the goods or services were received must be date entered in MUNIS, not the date the transaction is entered.



e. **Attach the receiving documentation**

- 1) When you have completed the process for all items. Search on the PO in PO Receiving. Locate line item 1.

- 2) Click on the Attach icon in the Ribbon.



- 3) Click on View Documents



- 4) Click on the + sign in the Ribbon



- 5) If scanning, load the document in the scanner. Click on the



Scan/Upload

- 6) If uploading the document from your computer, click on the import icon.



- 7) After the document has been scanned or uploaded from a file, give the document a title.

Attachment Title

RECEIVING DOCUMENT

- 8) Click on the file save file symbol.





f. **Completing the process**

The receiving process is now complete. Please batch the originals together and send them to Accounts Payable. Since you have scanned the documents into MUNIS TCM, you do not need to keep a copy of the documents at your site. Unless you just want to keep a paper file, you can access those records through MUNIS TCM.

g. **Checking the PO**

If you want to check the receiving record on the PO record, while in the receiving record, click on the Purchase Order Inquiry box. Once in the PO receiving record, refer to Section 3 of this training guide for more information.

PO number 22101823 ... Purchase Order Inquiry

Vendor alpha

6. **Freight**

- a. Line-item freight must be received in MUNIS.
- b. If the Distribution Center receives the items, Accounts Payable will receive freight on the PO.
- c. If the items are delivered to the school site, the site will be responsible for receiving freight in purchase order receiving.

7. **Receiving Substituted Items**

- a. If an item has been discontinued and vendor ships an acceptable substitute, you must get the Accounting to update the purchase order before you can receive the items. The purchase order must be updated before any receiving transactions can be added.

8. **Receiving Adjustments in MUNIS**

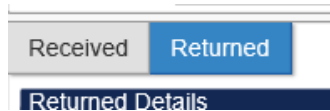
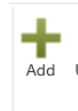
- a. **Union Distribution Center** – If a receiving error is discovered after the items have been delivered to the school/department site, e.g. Distribution Center miscounted, the following process should be followed.
 - 1) If the shipment is **long**, but within the quantity permitted on the PO, e.g., you ordered 10, the Distribution Center received 8 in MUNIS, but you received 10, compare the receiving documentation to the MUNIS receiving record. If the receiving documentation matches the actual quantity received at the site, the site secretary or financial clerk should receive the balance of those items in MUNIS Purchase Order Receiving. If the receiving documentation does not match the actual quantity received at the site, email the Distribution Center receiving office about the discrepancy. There may be additional documentation that can clarify the error. Work with the Distribution Center receiving office to reconcile the issue. It is the school/department's responsibility to ensure any actual overages are added to the receiving record.



- 2) If the shipment received at the school site is short, meaning the Distribution Center received more in MUNIS than what the site received, contact the Distribution Center Receiving Office. The receiving office will have to research the “shortage” and make an adjustment to the MUNIS receiving record. Shortage corrections need to be made by the Distribution Center.

9. Returns

- a. If the school site/department returns an item, the secretary or financial clerk at the school site is responsible for entering a return in MUNIS Purchase Order Receiving. Returns should be entered using the same method as receiving.
- b. The return must be entered as a new record in Purchase Order Receiving.
- c. Once in Purchasing Order Receiving (See Section 4. Above), click Add, and enter the PO number in the PO number field.
- d. Enter the applicable PO line # for the returned item and hit the Tab key



- e. Click on the Returned tab.
- f. Enter the quantity returned.
- g. Enter Comments (Required): Reason for return; actual date returned; shipper, e.g. FedEx, UPS, USPS, picked up by supplier.
- h. Enter the RMA, if you received one from the supplier.
- i. Click Accept.
- j. This return transaction will now show up as a transaction on the Receiving record in MUNIS.
- k. The Distribution Center will not be entering returns on behalf of the school/site in MUNIS.



CONTACTS FOR RECEIVING ISSUES

Purchasing & Distribution Center

Kurt Frentzel, Director
918-357-6177
frentzel.kurt@unionps.org

Stacy Haynes, Buyer
918-357-6167
Haynes.stacy@unionps.org

Accounts Payable

Rose Peace, Reconciliation Specialist
Peace.rose@unionps.org
918-357-6249

Melanie Coday, Accounting Mgr.
coday.melanie@unionps.org
918-357-6075



Furniture Purchasing and Standardization Policy Summary

Union Public Schools has established standardized office and classroom furniture to ensure consistency, compatibility, cost savings, and efficient management of district facilities. In accordance with Board Policy 3010, standardized furniture purchases are subject to review and approval by the Purchasing Department. [Board Policy 3010](#)

All employees must contact Purchasing before requesting furniture quotes, creating vendor shopping carts, or initiating any furniture purchase. This requirement applies to purchases from all suppliers, including online vendors such as Amazon, Staples, Office Depot, Wayfair, and similar retailers.

The policy applies to all office and classroom furniture, including but not limited to:

- Office chairs and task chairs
- Soft seating
- Bookcases and shelving
- Filing cabinets
- Teacher desks and student desks
- Conference tables
- Classroom tables
- Collaboration tables
- Other office or classroom furnishings

Purchasing will verify that requested items meet district furniture standards and will identify approved vendors, contracts, or cooperative purchasing agreements. Requests for non-standard furniture must receive Purchasing approval before quotes are obtained or purchase requests are created.

Failure to coordinate with Purchasing before obtaining quotes or creating carts may result in delays, cancellation of purchase requests, denial of reimbursement, or rejection of non-standard furniture requests.

Please Contact Purchasing first for any furniture need. Early coordination ensures compliance with district standards, provides access to approved pricing, and helps avoid unnecessary procurement delays. Stacy Haynes, 918-357-6167 or haynes.stacy@unionps.org

Purchasing Policies & Guidelines

- Any single purchase over \$10,000 must include one additional comparison quote if it is not purchased utilizing a state contract
 - If a contract is used it must be noted in the Vendor Sourcing Notes
- Any single purchase over \$100,000 must be managed by the purchasing department
 - Attach Summary or Tabulation and winning bid to REQ (keep all bids for auditing purposes)
 - Remember to request F.O.B. Destination Union Public Schools
- Any purchase of office/classroom furniture or technology must be made through Purchasing. We are happy to assist with any quote

MUNIS Tips

- Part numbers are first entry in all Line Items
- Remember to include all quote numbers in Vendor/Sourcing Notes and attach quote to REQ
- Ship to must match on quote and REQ. Typically the warehouse:
5526 S. 129th E. Ave., Tulsa 74134
- Ship To must match on Main Tab and each Line Item page (if you change one you must change all)
- If you are purchasing software or subscriptions Ship To should be “Does Not Apply”
- If you are purchasing goods/supplies you must include Standard Note 1614, Freight Terms
- If a vendor will be on your premises you will need to include Standard Note 1613, Insurance Requirement
- If your REQ is a blanket select “Amount” not Quantity and include the corresponding Standard Note