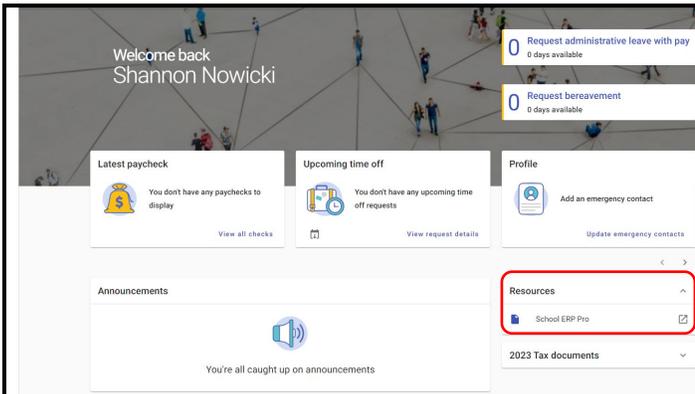




Entering in Purchase Requisitions (Manually Entering)



Getting in the system:

www.montytech.net > About > Business Office > Quick Links > Employee Access

Using your MT email and password, begin at the home screen of Employee Access. At the bottom right, click Resources > School ERP Pro

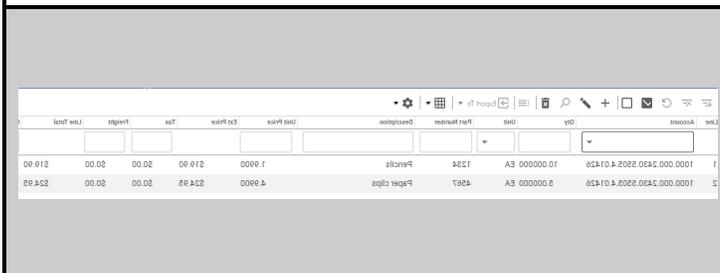


Getting to the control panel:

Purchasing and Payables > Purchasing > Control Panel

Adding a req:

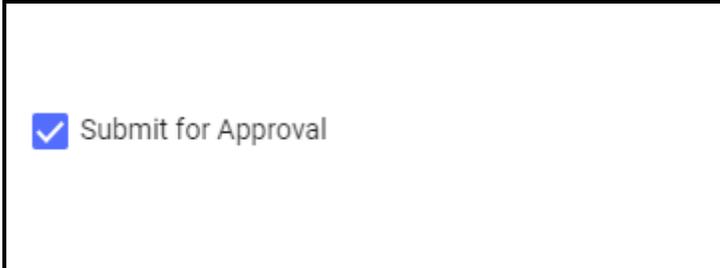
Click on +
Enter vendor, DAC, and Requester



Adding items:

Pick an account, quantity, unit, etc.
Click

Continue to add as many items as needed

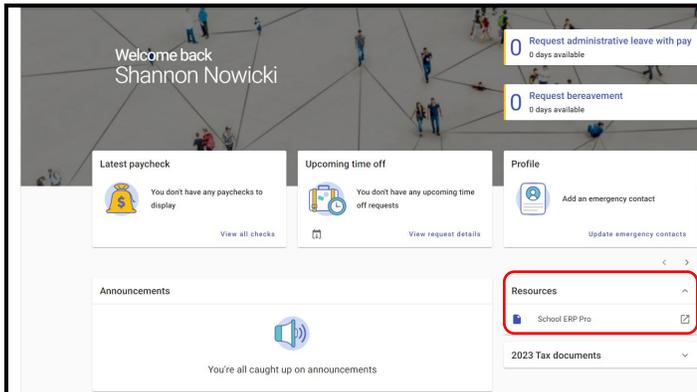


Submitting:

Once all items are on click "Submit for Approval at the bottom



Entering in Purchase Requisitions (Importing from Excel)



Getting in the system:

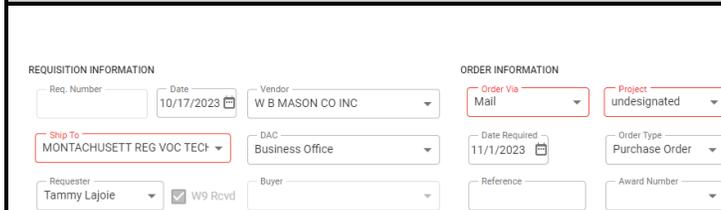
www.montytech.net > About > Business Office > Quick Links > Employee Access

Using your MT email and password, begin at the home screen of Employee Access. At the bottom right, click Resources > School ERP Pro



Getting to the control panel:

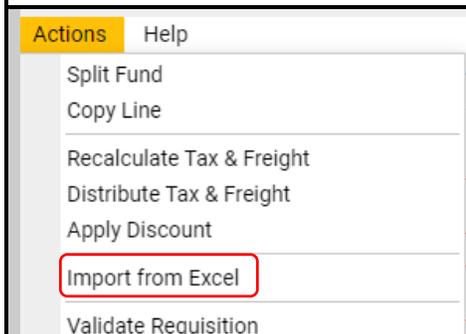
Purchasing and Payables > Purchasing > Control Panel



Adding a req:

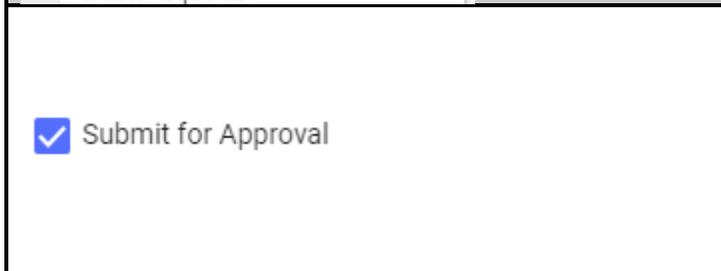
Click on +

Enter vendor, DAC, and Requester



Importing:

Actions > Import for Excel > find/select file > upload



Submitting:

Once all items are on click "Submit for Approval at the bottom



Tips and Tricks

Actions Help

- Split Fund
- Copy Line
- Recalculate Tax & Freight
- Distribute Tax & Freight
- Apply Discount
- Import from Excel
- Validate Requisition
- Check Budget
- Vendor Web Site
- eProcurement
- Insert Warehouse Items
- Single Line Entry
- Manage Documents
- Assign account to selected lines

Adding quotes/contract/invoice:

Actions > Manage Documents > select doc type/add note > click on > Find pdf and upload

Budget Balance Warning ×

The budget balance for the following account(s) has been exceeded

Account	Budget	YTD Expended	Encumbrance	Pending	Uncommitted Bal.	Budget
1000.000.2430.5505.4.01426	\$17,936.00	\$17,695.60	\$239.73	\$55.84	(\$55.17)	
	\$17,936.00	\$17,695.60	\$239.73	\$55.84	(\$55.17)	

Checking budget:

Once items have been added, prior to submitting for approval click on Actions > Check budget