## **Entering in Purchase Requisitions (Manually Entering)**



Welcome back Shannon Nowicki Litest paycheck We die an unstable Werden und werden paycheck to die days Werden und werden paycheck to die days Merden paycheck to die d	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
<ul> <li>Purchasing &amp; Payables</li> <li>Purchasing</li> <li>Control Pawel</li> <li>Purchase Requisitions</li> <li>Purchase Order Approval</li> <li>Purchase Order Approval<!--</td--><td><b>Getting to the control panel:</b> Purchasing and Payables &gt; Purchasing &gt; Control Pannel</td></li></ul>	<b>Getting to the control panel:</b> Purchasing and Payables > Purchasing > Control Pannel
REQUISITION INFORMATION     ORDER INFORMATION       Req. Number     Date       10/17/2023     WB MASON CO INC       We BMASON CO INC     Mail       Mail     Indesignated       Mail     Order Type       Montachusettr REG VOC TECF     Business Office       Requester     11/1/2023       Tammy Lajole     W9 Rovd	<b>Adding a req:</b> Click on + Enter vendor, DAC, and Requester
正 友 C C 図 (1 + ) へ 間 (三 ① Staper To + 聞・ 第・ Nam Annount (1 - ) (2 - )	Adding items: Pick an account, quantity, unit, etc. Click Click Continue to add as many items as needed
Submit for Approval	Submitting: Once all items are on click "Submit for Approval at the bottom

## Entering in Purchase Requisitions (Importing from Excel)



Welcome back   Shannon Nowicki	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
<ul> <li>Purchasing &amp; Payables</li> <li>Purchase Requisitions</li> <li>Purchase Requisitions</li> <li>Purchase Order Approval</li> <li>Pint Purchase Orders</li> <li>Receiving</li> <li>Payables</li> <li>Vendors</li> <li>Reports</li> <li>Configuration</li> </ul>	<b>Getting to the control panel:</b> Purchasing and Payables > Purchasing > Control Pannel
Date     Order INFORMATION       Req. Number     Date       10/17/2023     We MASON CO INC       Ship To     Mail       MONTACHUSETT REG VOC TECH     Business Office       Requester     Tammy Lajole	Adding a req: Click on + Enter vendor, DAC, and Requester
Actions     Help       Split Fund     E       Copy Line     E       Recalculate Tax & Freight     E       Distribute Tax & Freight     E       Apply Discount     E       Import from Excel     Validate Requisition	Importing: Actions > Import for Excel > find/select file > upload
Submit for Approval	<b>Submitting:</b> 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 acco	ount(s) has been exce	eded				×	
Account	Budget	YTD Expended	Encumbrance	Pending	Uncom	mitted Bal. Budget	Checking budget:
1000.000.2430.5505.4.01426	\$17,936.00	) \$17,695.60 ) \$17,695.60	\$239.73 \$239.73		\$55.84	(\$55.17)	Once items have been added, prior to submitting for approval click on Actions > Check budget
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