
How to Start an Order

1. Log onto the SMART eR website.
2. Enter your User ID and password.
3. Click on Login.
4. From the SMART eR menu, click on the **plus** button next to **Requests**.
5. If you desire to order from a vendor's webstore, click on **Ordering** and find the doco section "**Ordering (with Online Vendors)**".
6. If you desire to enter a requisition for items to be ordered, click on **Order Requisition Entry** and continue with the document.

Order Requisition Entry

This page allows the user to create an electronic order request form for any active and viewable vendor in your district's customized list of SMART Finance vendors. Depending upon your security access, the SKU field, account code field and period field may not be visible. A requisition will be in pending status until the creator routes it for processing. If these fields are NOT filled in, it will change to a Proof status until an employee with a higher security access completes it. Once these fields are filled in the requisition will change to an open status. At an open status, the requisition can continue through the SMART eR approval process or be transferred to a purchase order depending on the district's setup.

Current Requisitions tab


This tab will display active in process requisitions at a pending, proof and open status. It will list requisitions in the requisition record number order and be filtered per your login User ID. If additional rights are permitted and the requisition approval process is not set, the page will automatically display requisitions built by this user and any user that needs proofing (*Status = Proof*). This tab will provide access to create a new requisition, edit an existing requisition or change the status on the requisition.



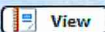
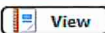
Order Requisition Entry

Current Requisitions

Past Requisitions

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.



	Req #	Vendor Name	Created By	Required	Status	Location	Type	
	1049	JONES SCHOOL SUPPLY CO INC	SABRINA 2. MAYNARD - 2444	11/20/2017	Pending	030	R	
	1048	IRC TEAM SPORTS	SABRINA 2. MAYNARD - 2444	11/20/2017	Proof	030	R	
	1043	A & G CORN MAZE	SABRINA 2. MAYNARD - 2444	11/17/2017	Open	010	R	

- **To Edit an existing requisition:** Click on the **Edit** button to edit an existing requisition. Information will follow on the data fields to be entered.
- **To change the Sort:** By default, both tabs will sort by Requisition Number. To change the sort temporarily, click on the blue underlined column heading. *For example, if you want to change the sort to Vendor Name, click on the column heading. The column will be resorted.* Click on the menu item **Requests|Order Requisition Entry** to 'reset' the sort.

- **To Add a new requisition:** Click on the **Add New** button to start a new requisition. The detailed instructions will follow under the section titled 'To Add a New Requisition Record'.
- **To View a processing requisition:** Click on the **View** button to list the information about the request after it has been routed for approval and processing. Click on **OK** to the open request.



In the case where approval is not set, a user may notice the '**All Open Reqs**' option at the top of the list. If checked, this will display all open requisitions and allow the user to edit them prior to transferring them to a purchase order record in SMART Finance.

Req #	Vendor Name	Created By	Required	Status	Location	Type
9016	3M - CHIND	REX 1. COOPER - 10744	10/25/2017	Open	110	R
9014	9TH PLANET LLC	REX 1. COOPER - 10744	10/25/2017	Proof	005	R

To Add a New Requisition record

1. From the Current Requisition tab, if no orders have been created yet, the page will open ready to enter a requisition. If you are searching for an existing requisition, then click **Cancel** to go back to the existing requisition list.
2. Click **Add New** to add a new requisition. *Fields with a colored background need to be entered before it will save.*

NOTE: The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

- A. **Date Required** will be pre-populated with today's date. Another date can be keyed or selected from the drop-down calendar. This should be the date the order is preferred by.

- B. **Ship to Location** is a required field. It will automatically pre-populate with the user's assigned shipto location (*if setup in SMART HR>Permissions*) or one can be selected from the drop-down list.
- C. **Comment** is optional for entry. Suggestion is to use this as an ATTN line or information for the Business Office. This line appears directly below the Ship-To Address information on the PO.
- D. **Vendor Notes** is optional for entry. Enter any comments for the vendor that may be necessary. The Vendor Notes would be used for any information that the user would like printed on a Purchase Order in SMART Finance. Start typing a portion of an autocoment for a short autocoment to appear, if known. This field is limited to 150 characters. For longer autocomments, use the **Add/Maintain Notes** button.
- E. **Vendor Code** is a required field. Start typing a portion of the vendor name and scroll to the appropriate vendor for selection.
- F. **Alt Address** - If there is an alternate vendor address, enter the Address Code or select from the list.
- G. **Buyer** is a required field. It will automatically pre-populate with the user's assigned buyer (*if setup in SMART HR*) or can be selected from the drop-down list.
- H. **Add/Maintain Notes**– Optional. This allows a note and/or a file attachment that may assist with processing the requisition.
 - a) Click on the **Add/Maintain Notes** button. The system will bring up the Notes page.

- b) Click on the **Add New** button.

- c) Enter in a **description** for this note. This is a required field.
- d) Click the **Browse** if adding a file attachment. Follow the prompts to select the file and attach.
- e) The **Note** area is for typing any other information that would help with processing this requisition.
- f) The **plus** button to the left of the note area, can be clicked to access any SF autocomments [All documents, requisition and purchase order].

- a. The autocomments selected will appear if they are setup.

Notes

Go Back

Requisition #: 1010

Vendor: AAA MATH - 33448

Save Cancel

Description Attachment Browse... No file selected.

+ Note

Auto Comment Select
Please select a row and click Insert

Code	Description
FALL	FALL ORDERS
Shipping	K2LOGISTICS
Sp Ed	Sp Ed Eligibility

Insert Cancel

- b. Highlight a row and click the **Insert** button to select the autocomment to populate the **Note** area.
- g) The Note area can be expanded for view by dragging the lower left corner of the Note area in some browsers.
- h) Click the **Save** button when finished making changes.

Notes

Go Back

Requisition #: 1010

Vendor: AAA MATH - 33448

Add New

Description	Note	Attachment File Name
Test Description	Yes	8229-1 17efw2c.pdf

View Edit Delete

- i) To add another note or attachment click on **Add New** button and repeat this process.
- j) If complete, click on the **Go Back** button to exit the Notes page and return to the **Order Requisition Entry** page.
3. Click on the **Save** button to save the vendor information and enter the detail of the requisition.

	SKU Code	Item #/Description	Units	U.Type	Rate	Discount	Total Cost	Type	Account Code
Add/Save Row	R	Receiving	1.00	EA	0.00	0.00 %	0.00	E	01-320-050-000-000-430

NOTE: The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

- On the Detail section, enter in a **SKU code** if the field is displayed. This is optional field for entry with a pending status requisition.
- In the **Item#/Description** field, enter the catalog number and the item description.
- Enter the number of **Units**.
- U. Type:** Unit Type will default to EA. Change it if necessary.

- E. Enter the **Rate**. For more information about what is allowed in this field, place your cursor over the Rate column heading.
- F. Enter a **Discount** if needed. The field allows up to 7 digits such as 00.0000% or 000.000% if needed.
- G. The system will automatically calculate the **Total Cost** per row and the **Requisition Total**.


NOTE: If any of the detail rows are at a 0.00 unit, this detail row will not transfer to the purchase order.

If the district needs to type a message to the vendor, enter in 1.00 unit at 0.00 rate to denote these for shipping or promotional items in the description field.

- H. Enter an **Account Code** if known. This is an optional field for entry. Do not enter anything other than numbers or else the window will give you an invalid format error. The user's default will autopopulate (if setup in SMART HR). Otherwise, begin by keying in the fund. The first 5 relevant account codes in the user's permission range will be listed (or less if they don't have access to 5 codes). As you key more, the list will be refined.

- a) To distribute an account code among various account code, click the 'Dist' button near the start of the add/save row button.


SKU Code	Item #/Description	Units	U.Type	Rate	Discount	Total Cost	Type
REC	Item XYZ 2	1.00	EA	40	0.00 %	40.00	E

 *Reminder to add shipping, handling or promotional amounts

- b) This will bring up the Requisition Distribution page.
- c) On the Add/Save Row, either distribute by a percentage and by the amount and enter an account code. Click on the Add/Save Row button to save the distribution row.

Requisition Distribution

Fields with a colored background need to be entered before saving.

 Go Back

Sku Code: REC

Item #/Description: Item XYZ 2


Distribution Amount: 40.00

Remaining Balance: 0.00

Percent	Units	Rate	Discount	Total Cost	Type	Account Code
25 %	1.00	40.00	0.00 %	10.00	E	04-005-505-000-321-430

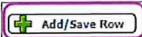
Distributed Items Total: 40.00


Percent	Units	Rate	Discount	Total Cost	Type	Account Code
25.00 %	1.00	40.00	0.00 %	10.00	E	04-005-505-000-321-430
75.00 %	1.00	40.00	0.00 %	30.00	E	04-005-505-000-321-401

- d) Repeat the process of adding and saving a row until the Remaining Balance is 0.00.
- e) Click the Go Back button at the top left to return to the Requisition Entry page. The Distributed rows will auto appear at the bottom half of the Requisition Entry page and the Dist button now will highlight in blue to indicate there are distribution rows .
- I. If displayed: The **period** should default in based on the **Date Required** entered previously.
- J. **Ship to Location** – will be set to user's default (if setup in SMART HR). Otherwise, select one from the drop-down list.
- K. **Change reason** – this field is available to PO/POADMIN users to make a note on a detail line about why they might be altering a row so the original requester can see why or what happened.

L. **Detail Comments** is optional for entry. Enter any comments necessary for this row by clicking on the **plus** button to the right of the **Add/Save row** button. These detailed comments will print on the Purchase Order form.

- Click on the **Save** button to save the detail of the requisition. The saved row will move to the bottom portion of the web page and highlight in yellow to indicate it is overbudget. If another row of detail is needed, enter the data on the **Add/Save Row** line. Continue to add rows as needed.

	SKU Code	Item #/Description	Units	U.Type	Rate	Discount	Total Cost	Type	Account Code
	REC	Misc Req	1.00	EA	0.00	0.00 %	0.00	E	

 *Reminder to add shipping, handling or promotional amounts

- When finished adding detail rows, click the **Save** button at the top of the page to return back to the list of requisitions under the Current Requisition tab.

Current Requisitions

Past Requisitions


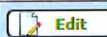
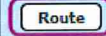
Previously saved requisitions with a Pending status are aut
Fields with a colored background need to be entered before




Status Open

Date Required 11/28/2017

- The requisitions can be edited as many times as needed in pending mode. Click on the **Route** button if you are finished with the requisition to send it to be proofed and processed.

	Reg #	Vendor Name	Created By	Required	Status	Type	
	1053	A & G CORN MAZE	SABRINA 2. MAYNARD - 2444	11/28/2017	Open	R	
	1049	JONES SCHOOL SUPPLY CO INC	SABRINA 2. MAYNARD - 2444	11/20/2017	Pending	R	

- A warning message will appear:

You are about to route this requisition and will be unable to edit this requisition again.

OK

Cancel

- Click **Ok** to continue, or **Cancel** to go back to the list.

NOTE: If a person has more than one supervisor OR if a supervisor is in charge of more than one building, a message will open asking the user to choose which one to route to:

Approver Select
Please select a row and click Select

Approver	Building/Location
PARRISH, DONALD 5 - 57	MN Elementary
PARRISH, DONALD 5 - 57	Good Elem




- The order will move to either a Proof or Open Status for further processing and will only be viewable from that point forward (unless you have additional credentials that allow for proofing or approval and are not using routing and approvals).

Order Requisition Entry

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

 [Add New](#)


	Req #	Vendor Name	Created By	Required	Status	Type
 View	1011	ACE EDUCATIONAL SUPPLIES	MONA 1. AGUIRRE - 1272	07/26/2017	Proof	R
 View	1008	A TO Z RENTAL	MONA 1. AGUIRRE - 1272	07/25/2017	Proof	R
 View	1006	AMERICAN COATED PRODUCTS	MONA 1. AGUIRRE - 1272	07/24/2017	Open	R
 View	1005	A CHANCE TO GROW	MONA 1. AGUIRRE - 1272	07/24/2017	Open	R



NOTE: For someone with additional credentials and NOT using approvals, the list will display your own requisitions as well as anything in a Proof status.

Once they are in an Open status, they will not show in the listing. If for some reason, they need to be accessed – click on the checkbox next to All Open Reqs. That will include them in the listing. They will not be in the list if they include some/all transferred requisition detail lines.

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

 [Add New](#) ☒ All Open Reqs


	Req #	Vendor Name	Created By	Required	Status	Location	Type
 Edit	9016	3M - CHIMD	REX 1. COOPER - 10744	10/25/2017	Open	110	R
 Edit	9014	9TH PLANET LLC	REX 1. COOPER - 10744	10/25/2017	Open	005	R

If there are no requisitions to proof or you have not entered any, it will look like the following:

Order Requisition Entry

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

 [Add New](#) ☐ All Open Reqs

No Current Requisitions


10. If you wish to place another order, repeat the above steps. Otherwise click the **Logout** link in the top right corner under your logged in name.
11. If using Approvals (and if they have an email setup in SMART HR), a notification will be sent overnight to tell them they have something to approve in case they didn't see it in SMART eR.

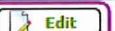

To Edit an Existing Requisition

1. From the Current Requisition tab, click **Edit** to edit a requisition.

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

 ☐ All Open Reqs

	Req #	Vendor Name	Created By	Required	Status	Location	Type	
	9017	241 SUPPORT STAFF	Aaron A. Adams - 206	11/28/2017	Open	005	R	

- This will bring up the Order Requisition Entry page. If changes are needed at the top portion of the requisition such as date, vendor, comments, etc., then make and change and click the **Save** button near the **Cancel** button.

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

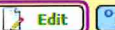





Fields with a colored background need to be entered before saving.

Status

Date Required

- If further changes need to be made with the detail rows, click the **Edit** button to the right of the detail row. Click **Save** to save the changes.

	SKU Code	
  	REC	Item
  	REC	Mis

- If the detail row is no longer needed, click the **Delete** button to remove this detail row.

	SKU Code	
  	REC	Item
  	REC	Mis

- When finished with the changes, click the **Save** button at the top left of the Requisition page to return to the Requisition list on the Current Requisitions tab.

To Close a Requisition



- In the case where approval is not used, there is an option to set a requisition to a 'Closed' Status. This will set the status of the requisition to a closed status and the requisition will not move further in the process.

Order Requisition Entry

Current Requisitions **Past Requisitions**

Previously saved requisitions with a Pending status are automatically deleted by the system after two weeks.

Fields with a colored background need to be entered before saving.

Status

Date Required

Comments

Vendor Code

Alt Address

Req# 27065

Created By HANNAH 2. MARSHALL - 2167

Ship to Location

Vendor Notes

Buyer

- From the Status field click on the arrow and select Closed. Click the **Save** button in the top left to save this change.
- To view this closed status requisition, continue on to the next section.