



Warehouse Stores Requisitions Guide

WAREHOUSE STORES REQUESTS

For any questions on Warehouse Stores requisitions contact the Warehouse at Ext: 2690

STOCKTON UNIFIED SCHOOL DISTRICT | 56 SOUTH LINCOLN STREET STOCKTON, CA 95203

Table of Contents

Warehouse Stores Requisitions 2

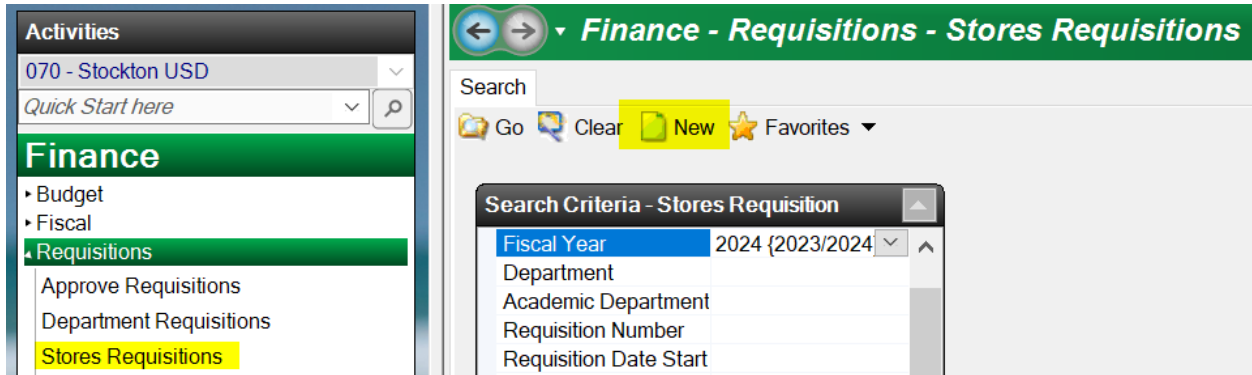
Warehouse Stores Requisition Tabs 2

Warehouse Stores Requisitions Tasks 5

Warehouse Stores Requisitions

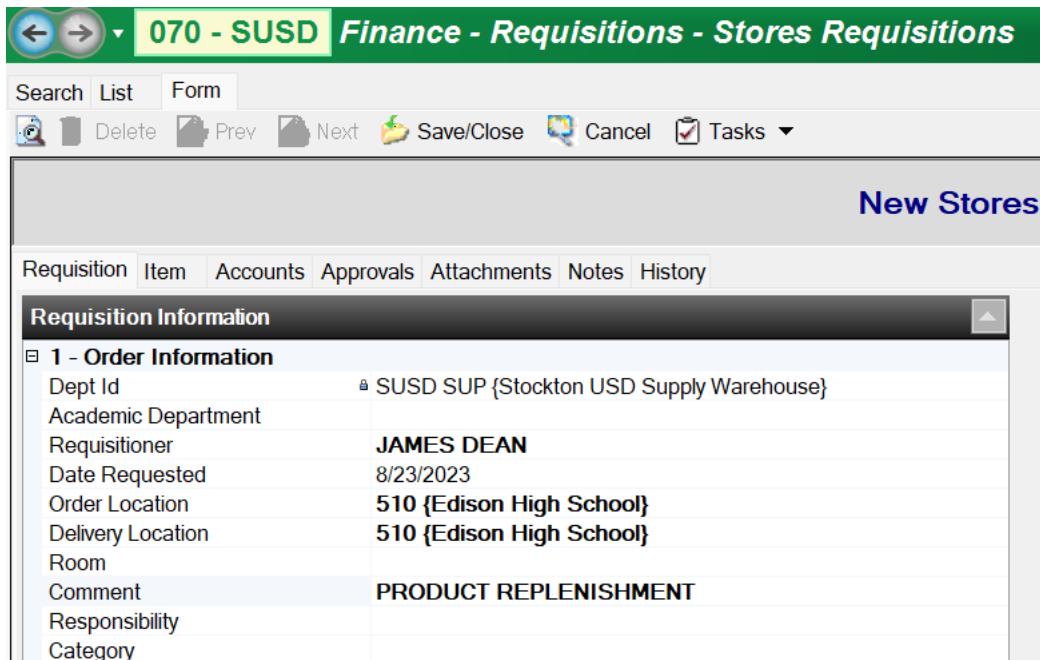
Warehouse Stores Requisitions are for internal use only.

Go to **Finance > Requisitions > Store Requisitions**. Click on “New”.



Warehouse Stores Requisition Tabs

Requisition Tab – You can edit the Requisitioner and Request Date if needed. Required fields are Order Location and Comment. Use the comment to describe the purchase justification (what the purchase is for):



Items Tab – You will use the Stores Item # field drop-down list to see and select available items. Enter “0” in the Stores Item # field, then the field drop-down arrow. Then update the quantity. The price will be preset. Repeat this process for any additional items.

070 - SUSD Finance - Requisitions - Stores Requisitions

Search List Form

Delete Prev Next Save/Close Cancel Tasks

New Stores Requisition

Requisition **Item** Accounts Approvals Attachments Notes History

Open New Export Delete Prev Next Save/New Save/Close Cancel

1- Item Order Information

Stores Item #	0
Order Quantity	1
Available Qty	
Unit Price	
Extended Cost	
Order Unit	
Description	
Line	

2- Add/Update Information

Item #	Description
0010063	SOAP, HAND, ANTI-BAC, 1-LITER
0010415	TOILET SEAT COVER, 1/2 FOLD, F
0010475	DISPENSER, FOR ROLL TOWELS
0010962	GLOVES, NITRILE NON POWERED ...
0010963	GLOVES, NITRILE, NON POWERED XL
0010964	GLOVES, NITRILE, NON POWERED L
0011139	LAMP FLUORESCENT, 48" T 30/CASE
0011161	RECEPTACLE, SANITARY NAPKIN
0011363	GLOVES, VINYL MED CLR 100/BOX
0011366	GLOVES, VINYL, SMALL 100/BOX

Use “Save/New” to create another item. Use “Save/Close” after the last item.

070 - SUSD Finance - Requisitions - Stores Requisitions

Search List Form

Delete Prev Next Save/Close Cancel Tasks

New Stores Requisition

Requisition **Item** Accounts Approvals Attachments Notes History

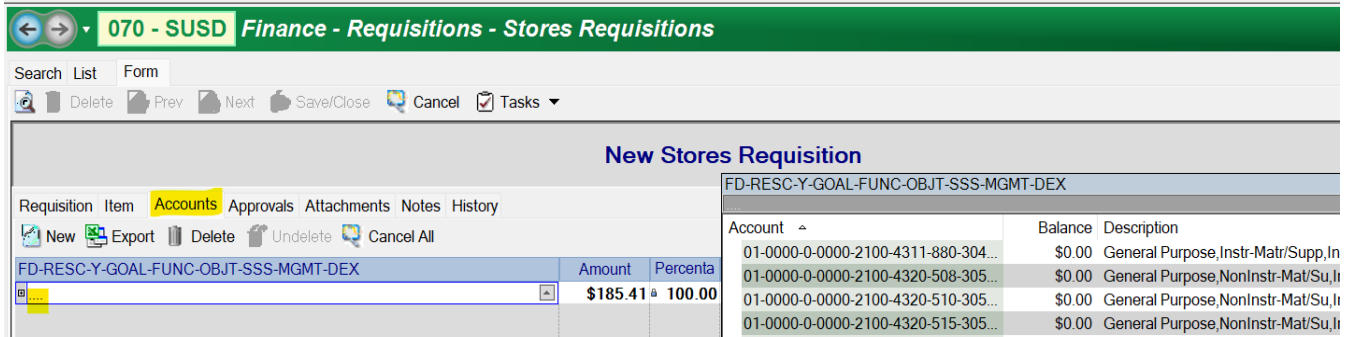
Open New Export Delete Prev Next **Save/New** **Save/Close** Cancel

1- Item Order Information

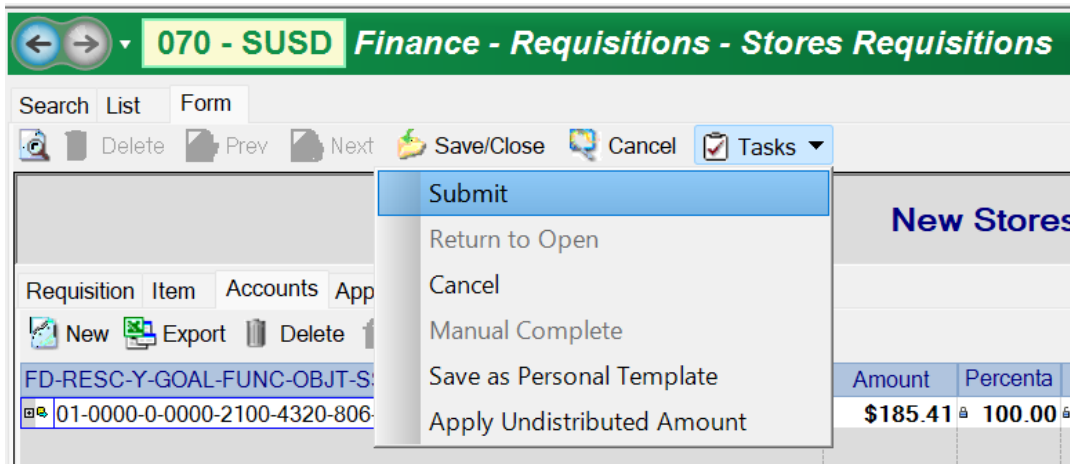
Stores Item #	0011161
Order Quantity	9
Available Qty	26
Unit Price	20.6010
Extended Cost	185.41
Order Unit	EACH
Description	RECEPTACLE, SANITARY NAPKIN
Line	

2- Add/Update Information

Accounts – Enter “01” for Fund 01 or “09” for Fund 09, then click on the look up button. This will display available accounts to select:



Submit – After all tabs are complete, click on “Tasks” and “Submit” which will send the request through the required approvals:



Approvals – This lists all of the approvals for the requisition where you can see who still needs to approve.

Attachments – Attach backup for the requisition, if applicable.

Notes – This is additional information that you want kept with the record. All users can see this information. It can also be displayed in reports.

History – This contains historical records of all information that has changed and by whom. All users can see this information. It can also be displayed in reports.

Warehouse Stores Requisitions Tasks

Submit – To submit a requisition, you must enter all required fields, at least one account and one line item. All amounts must be distributed. When you select this task, the requisition is submitted, an encumbrance JE is posted, a history record is written and approval records (or not, as defined) are written to the Approvals tab.

Return to Open – If there is a change that must be made, this option returns the requisition to the Open status, reverses the encumbrance in the requisition and writes a history record. The requisition can be resubmitted once changes are made. This option is not available when a requisition is in the Cancelled or Complete status.

Cancel – Cancelling a requisition changes the status to Cancelled, reverses the encumbrance and creates a history record. This option is not available when a requisition is in the Complete status.