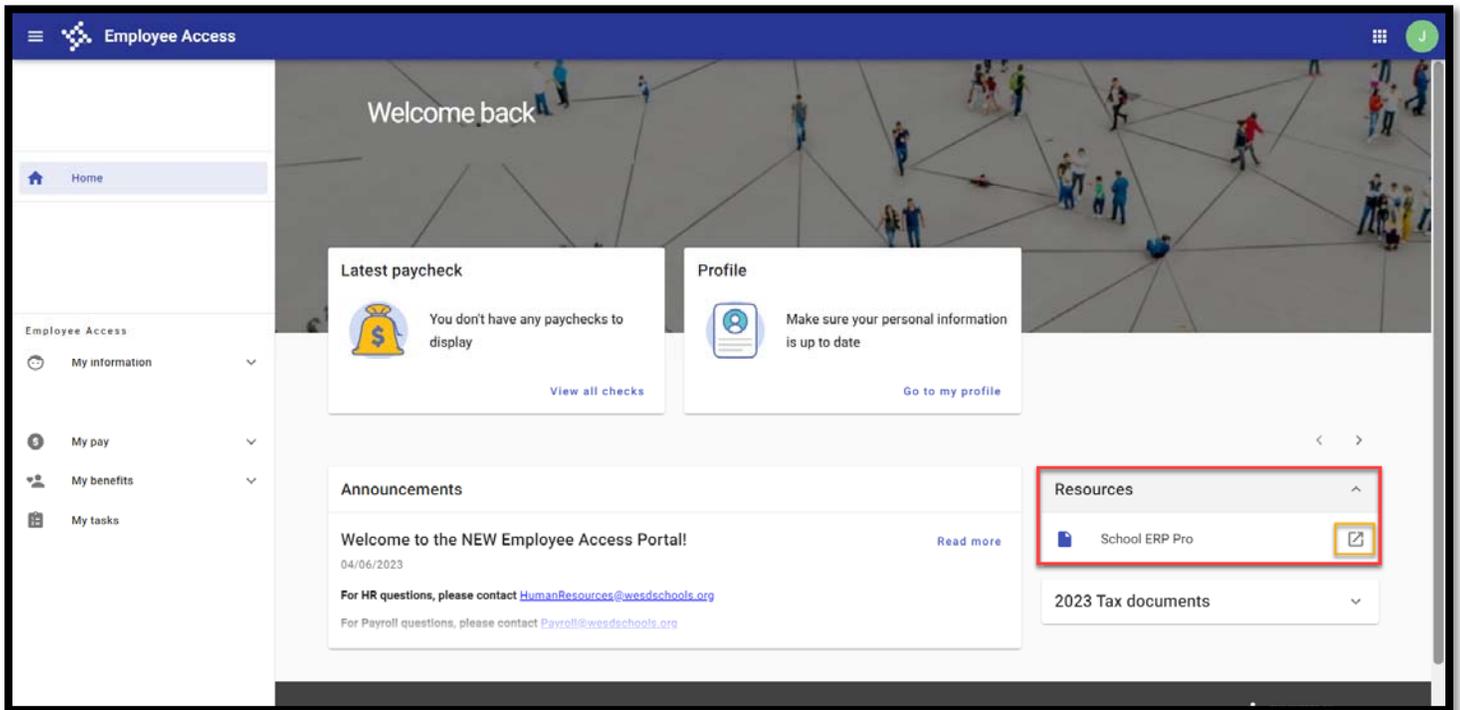


# How-To Enter a Warehouse Requisition

For assistance, please contact [SchoolERPSupport@wedschools.org](mailto:SchoolERPSupport@wedschools.org)

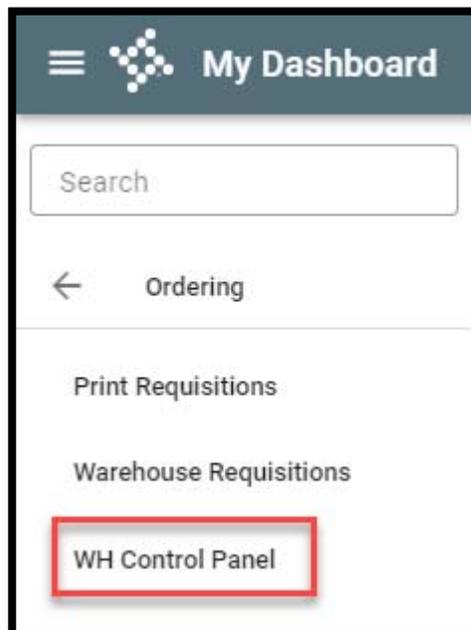
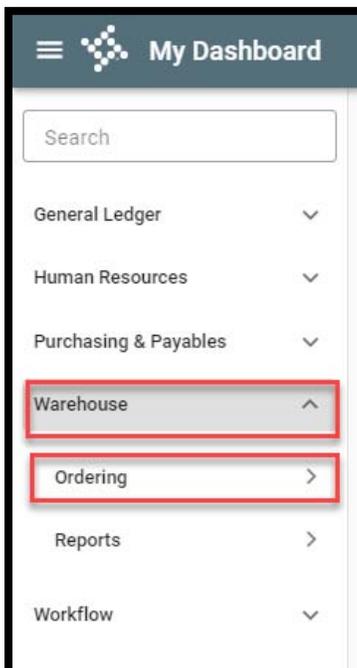
**STEP 1:** Login to School ERP Pro through Employee Access Portal (<https://tyler-waestaz.okta.com/>)  
\*Employee Access Portal can also be access by WESD website > Staff > Employee Access – School ERP Pro



**STEP 2:** Click on “Hamburger” Menu next to My Dashboard



**STEP 3:** Click on Warehouse > Ordering > WH Control Panel



**STEP 4:** Click +Add to start a new Warehouse Requisition

WH Control Panel

Filter Criteria

Req. No.

Warehouse: MMC

Department: Acacia

Project

View

Show Account Detail

Show Has Documents

From Date

To Date

Clear Apply

+ Add

**STEP 5:** Fill in all sections below

1. *Department* – will default to your DAC
2. *Requester* – select site from drop down
3. *Ship to* – select school where items are to be shipped
4. *Date Required* – leave as is
5. *Requisition Date* – will default to current date
6. *Project* – will default to undesignated – do not need to change
7. *Warehouse* – will default to MMC
8. *Manage Documents* – attach any necessary backup documentation if needed

WH Control Panel

Requisition Number: 0

Requisition Detail

Department \* 1

Requester \* 2

Requester is required.

Ship To \* 3

Ship To is required.

Date Required 4

Project \* 6

Warehouse \* 7

8 Manage documents

Requisition Number: 0

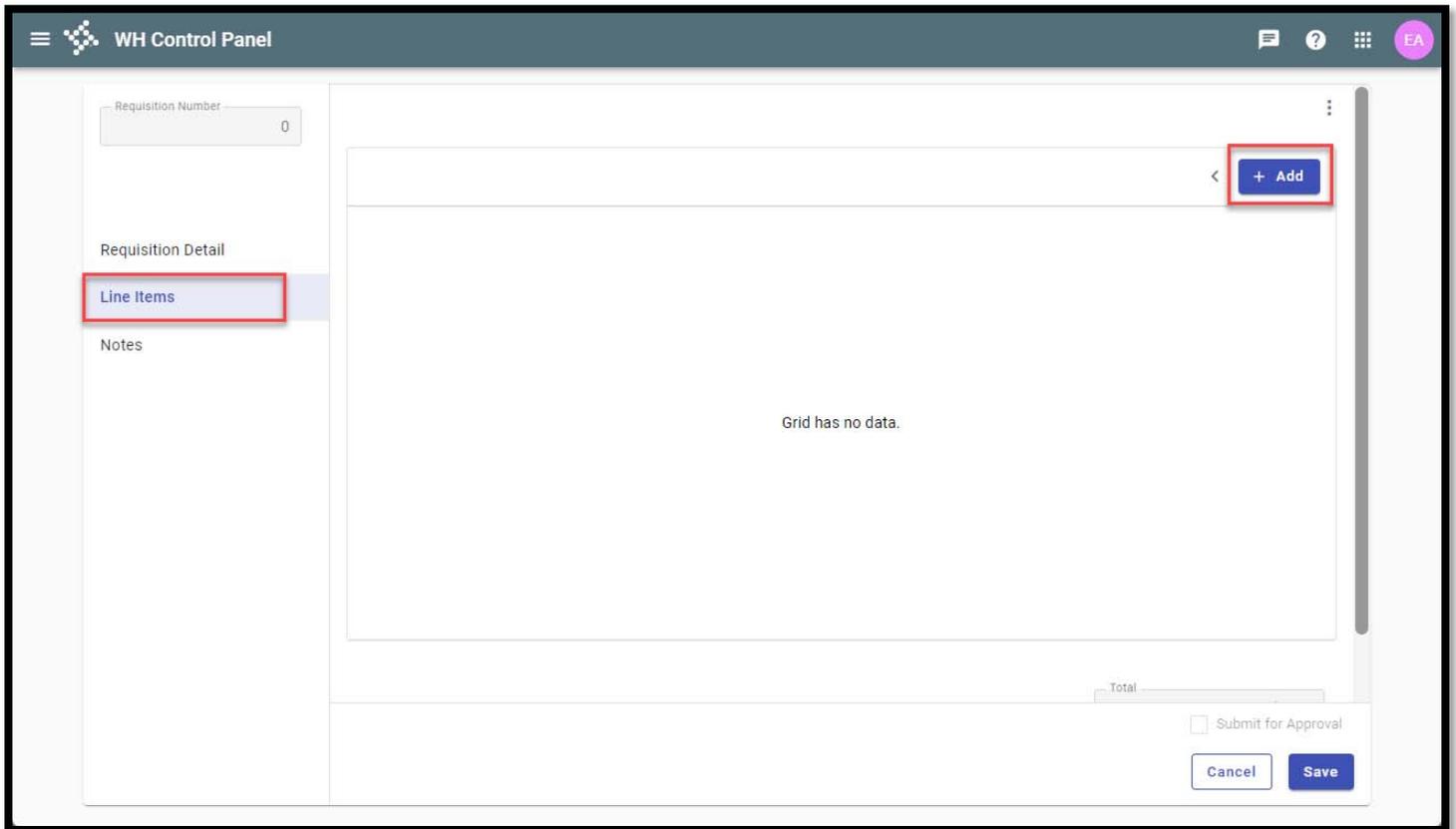
Requisition Date 5

05/11/2023

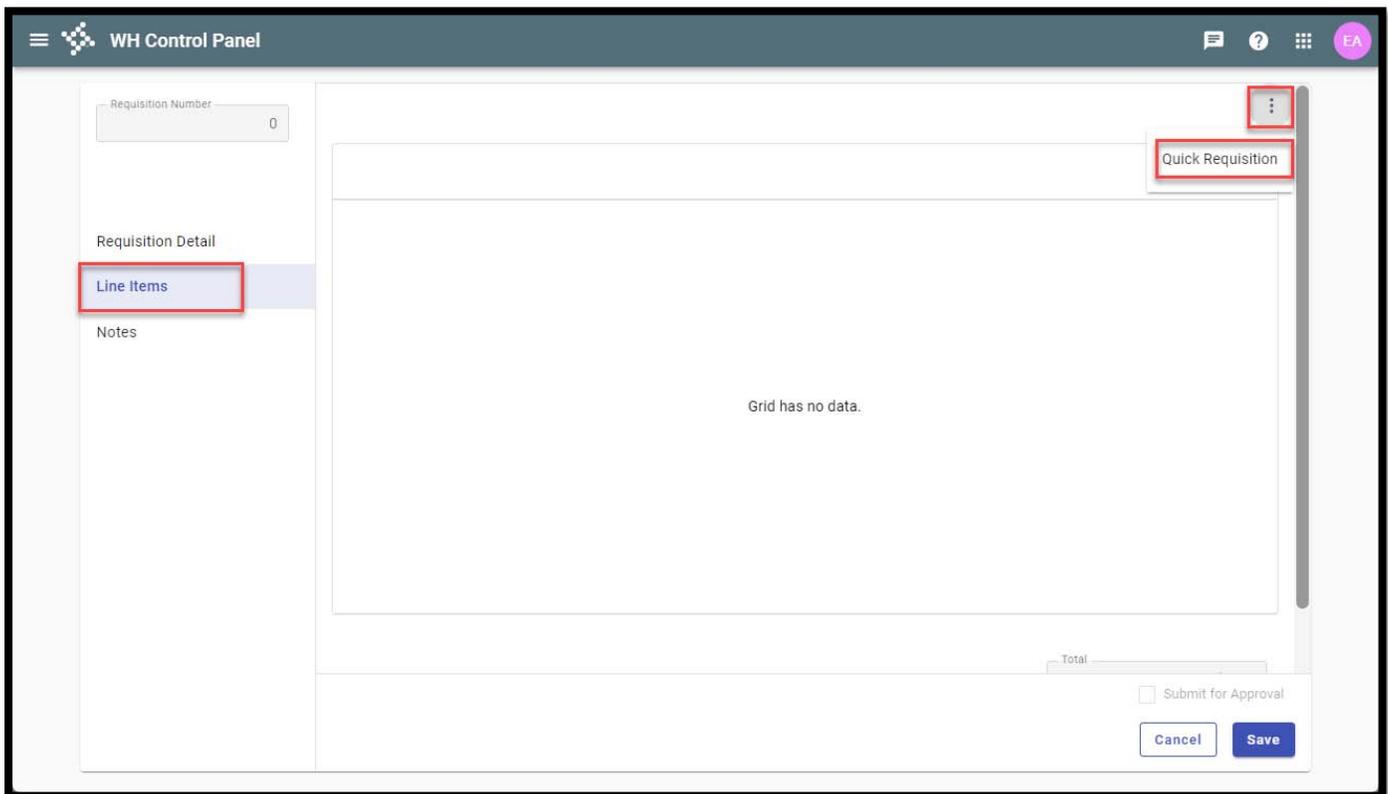
Submit for Approval

Cancel Save

**STEP 6:** After top section has been filled out > click Line Items > +Add



**\*\*For multi-line items wishing to be purchased from the Warehouse on one Warehouse Requisition > click Line Items > three (3) dots in top right corner > Quick Requisition. This will allow for several separate items to be ordered on one requisition.**



## STEP 7: Fill in sections 1-3 > click Done

1. *Item Number* – click in box and items will appear or start typing in item number

*Description* – will auto-populate

*Unit* – will default

*Unit Price* – will default to Warehouse price

*Line Total* – will auto-populate

2. *Quantity* – enter quantity wishing to be purchased

3. *Account* – click in box and account codes will appear or start typing in account code

*Ext* – will auto-populate

*Grant Project* – leave default

The screenshot shows the 'WH Control Panel' interface. At the top, there is a header with a menu icon, the text 'WH Control Panel', and several utility icons including a help icon and a user profile icon labeled 'EA'. The main content area is a form for adding an item, divided into three sections marked with red circles containing numbers 1, 2, and 3.

**Section 1:** Contains the 'Item Number' field with the value 'A1050 - Canvas Board - 12" X 16" - EA - 7', the 'Description' field with 'Canvas Board - 12" X 16"', a 'Unit' dropdown menu, 'Unit Price' (\$1.4700), and 'Line Total' (\$7.3500). There is also a 'Lock Price' checkbox.

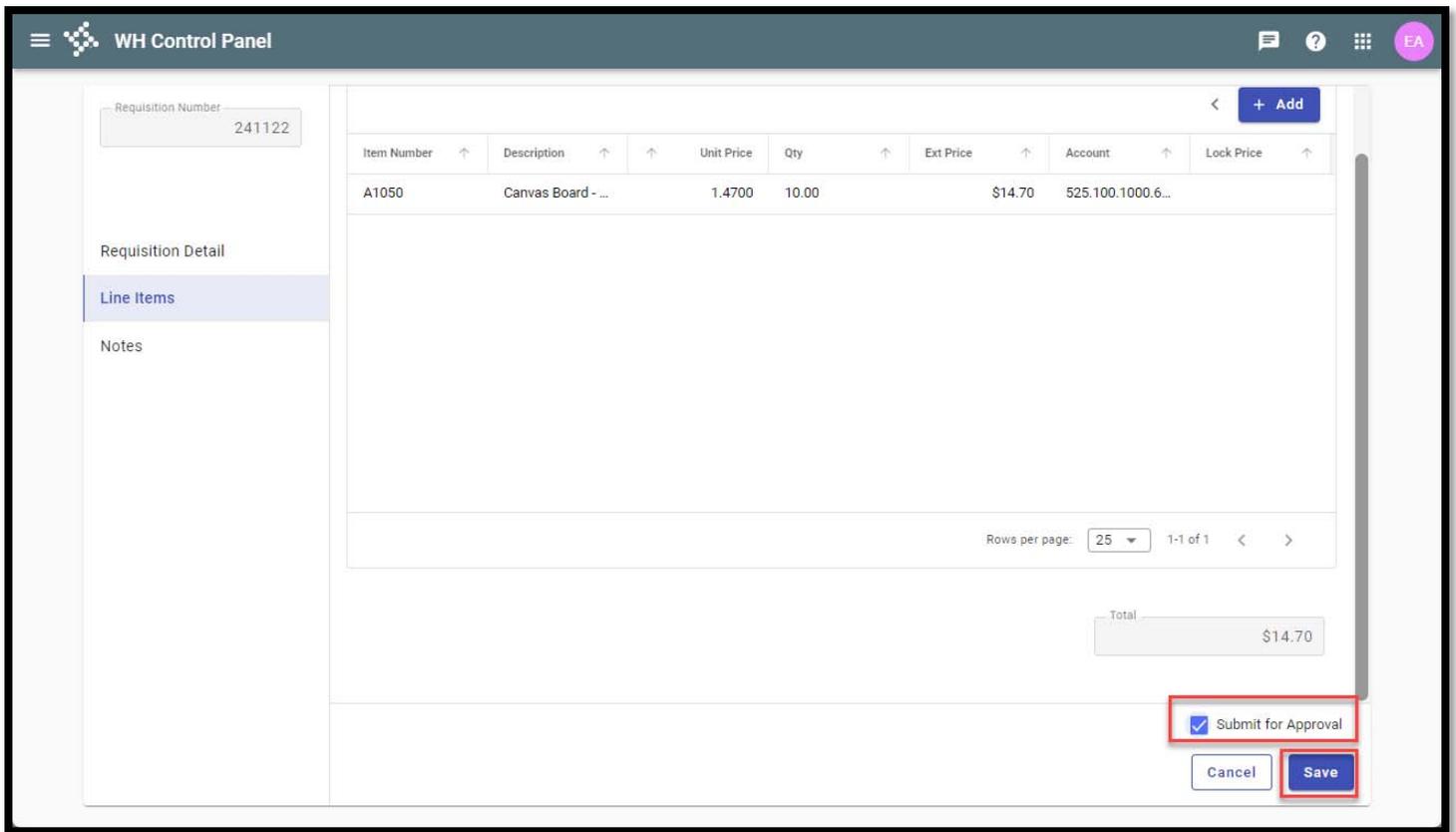
**Section 2:** Contains the 'Qty' field with the value '5', the 'Account' field with '001.100.1000.6610.114.0000 - General Supplies', the 'Ext' field with '\$7.3500', and the 'Grant Project' dropdown menu with 'Grant Project' selected. There is an '+ Add' button on the right.

**Section 3:** Contains the 'Quantity' field with the value '5' and the 'Extended Price' field with '\$7.3500'. There is a 'Hold Account Distribution' checkbox.

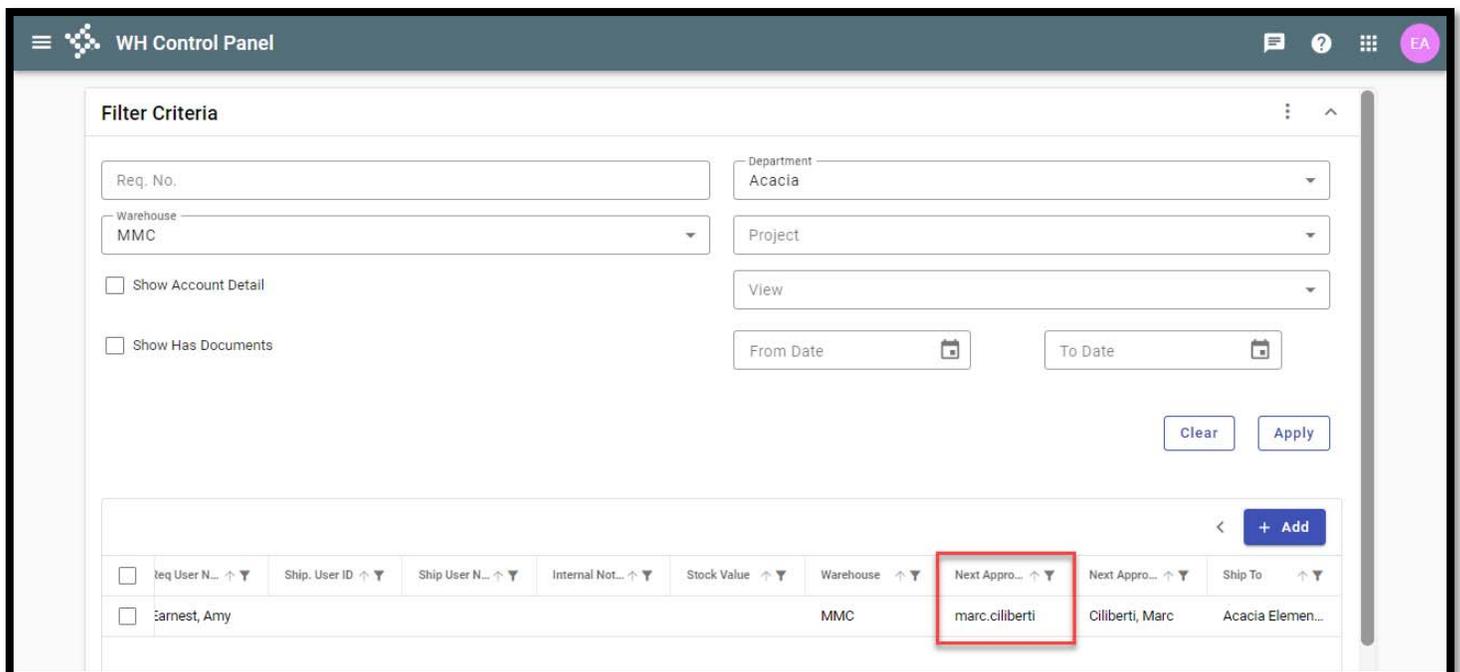
At the bottom right of the form, there are two buttons: 'Cancel' and 'Done'. The 'Done' button is highlighted with a red box.

**STEP 8:** After line item has been added, check box for Submit for Approval

*\*If you wish to save the requisition in your queue and not release to next approver yet, do not select check box and just click Save*



**STEP 9:** After clicking Submit for Approval, screen will take you back to WH Control Panel. You should then see the requisition that was just released from the queue and is now with the next approver.



\*\*If requisition stays 'Orig' in Next Approver column, this means it has not yet been released from the queue to start in the line of approval. In order to release from the queue, double click on requisition > scroll to bottom > check box for Submit for Approval > click Save.

**Friendly Reminders:**

- If an item is going to be split funded, follows Step 7
- A multi-item Warehouse Requisition can be performed by selecting the Quick Requisition feature after filling out the details
- Attach any backup documentation to support the Warehouse requisition request