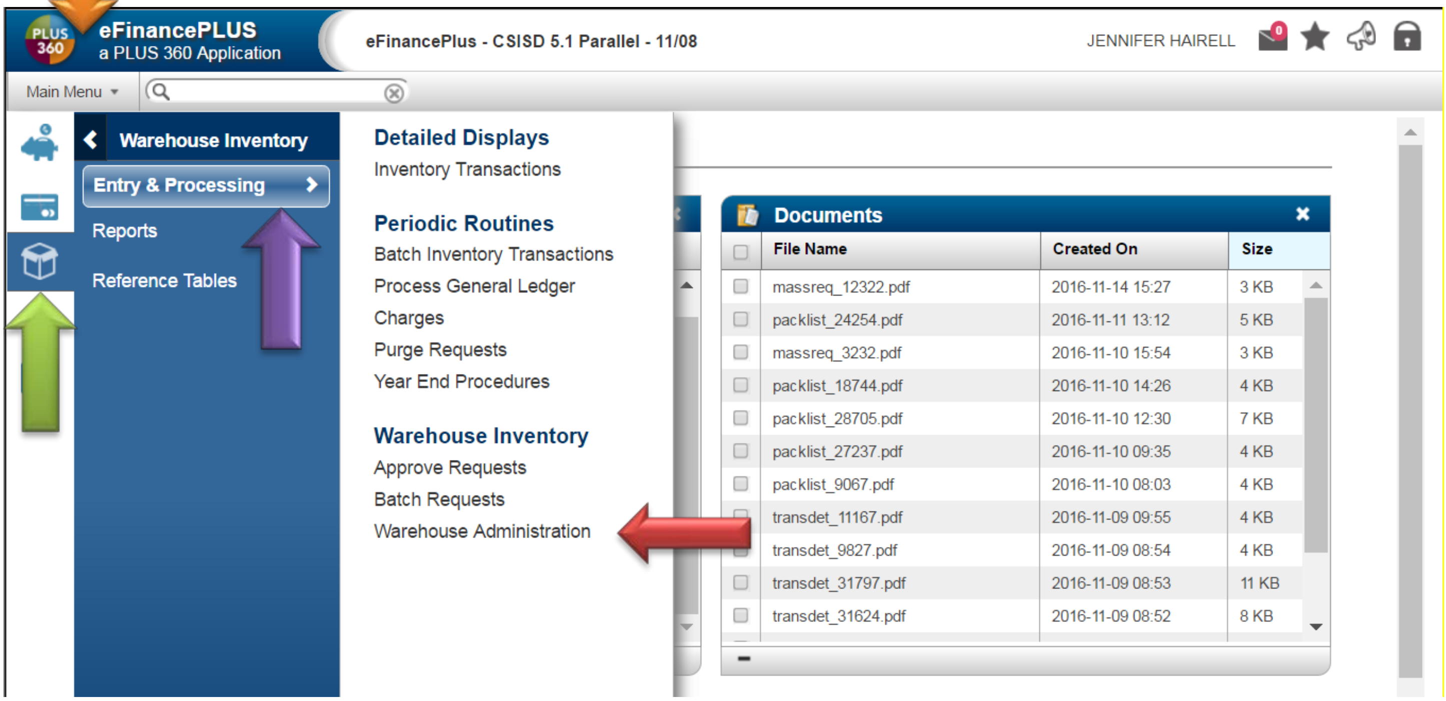
Entering a Warehouse Requisition

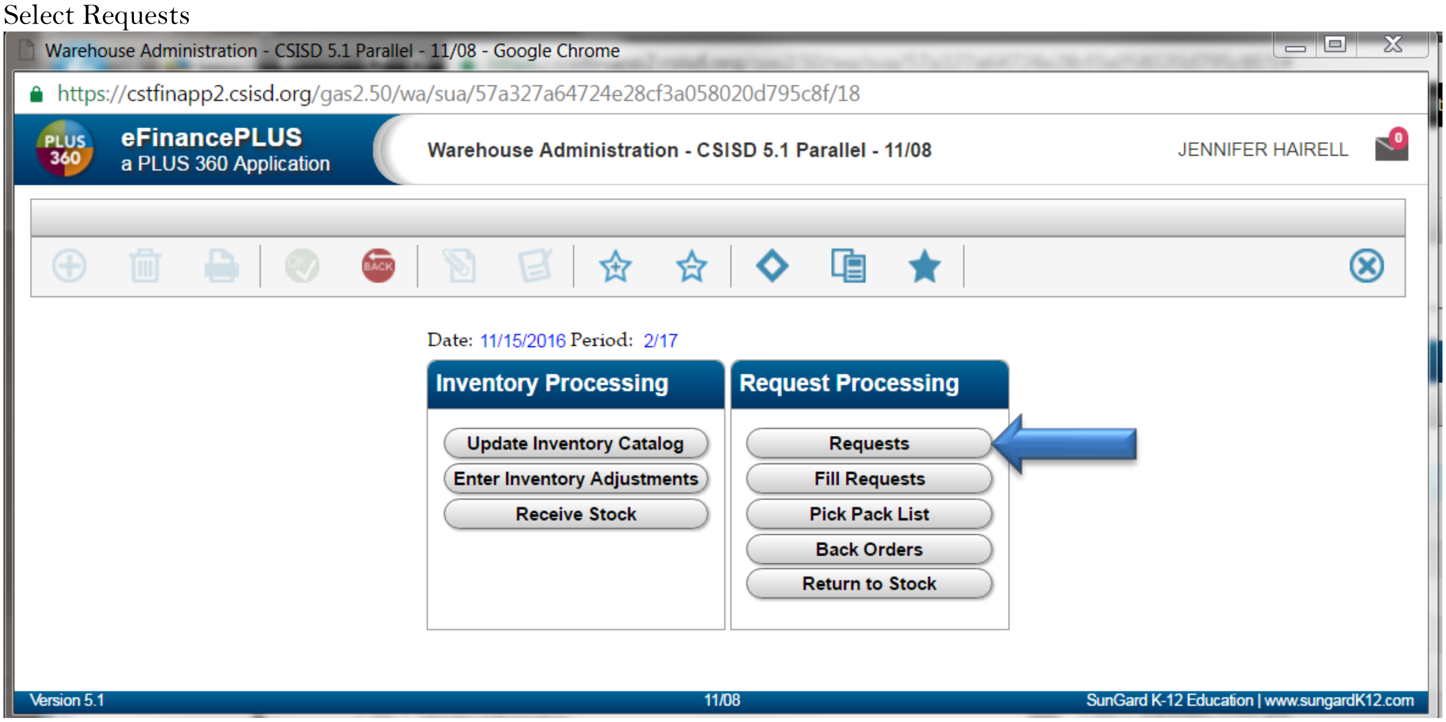
Log into eFinance Plus 5.1

Main Menu – **WAREHOUSE INVENTORY** – **ENTRY & PROCESSING** -> Select **Warehouse Administration** (See below)

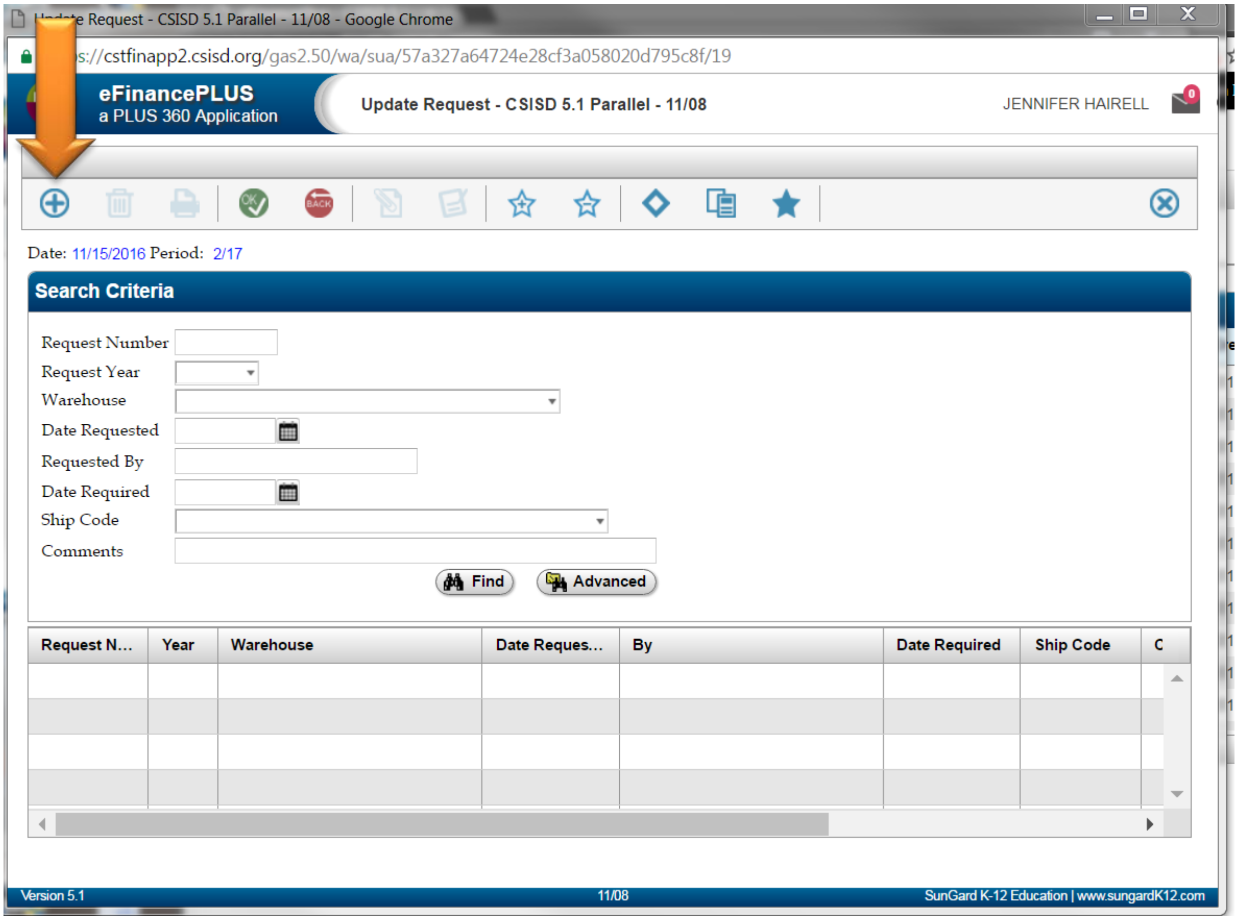


A new window will open. (If it does not open, check to make sure that you have set your Pop-Up blocker to allow efinance to send you Pop-Ups.)

Select Requests

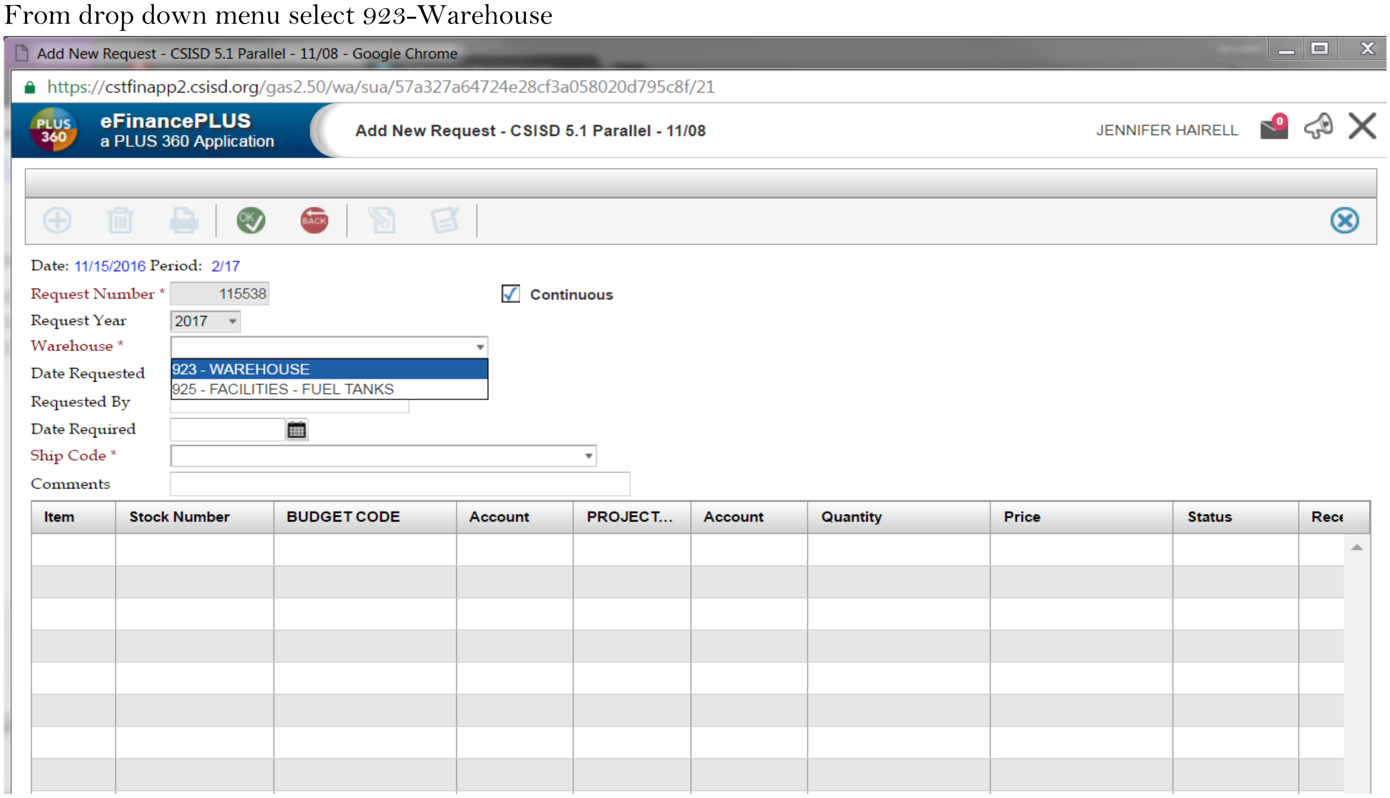


Select New Document (circle with a plus sign)



Write down the request number now.

From drop down menu select 923-Warehouse

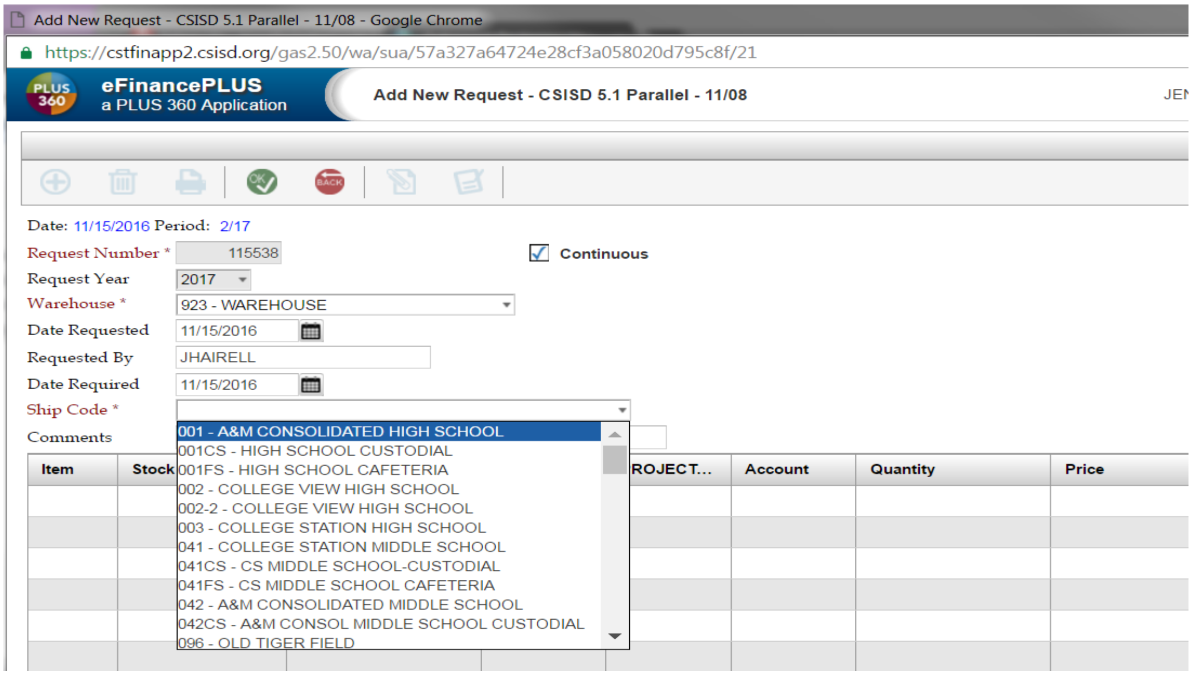


Date Requested will automatically show today's date.

Requested By: enter name

Date Required: date item is required by

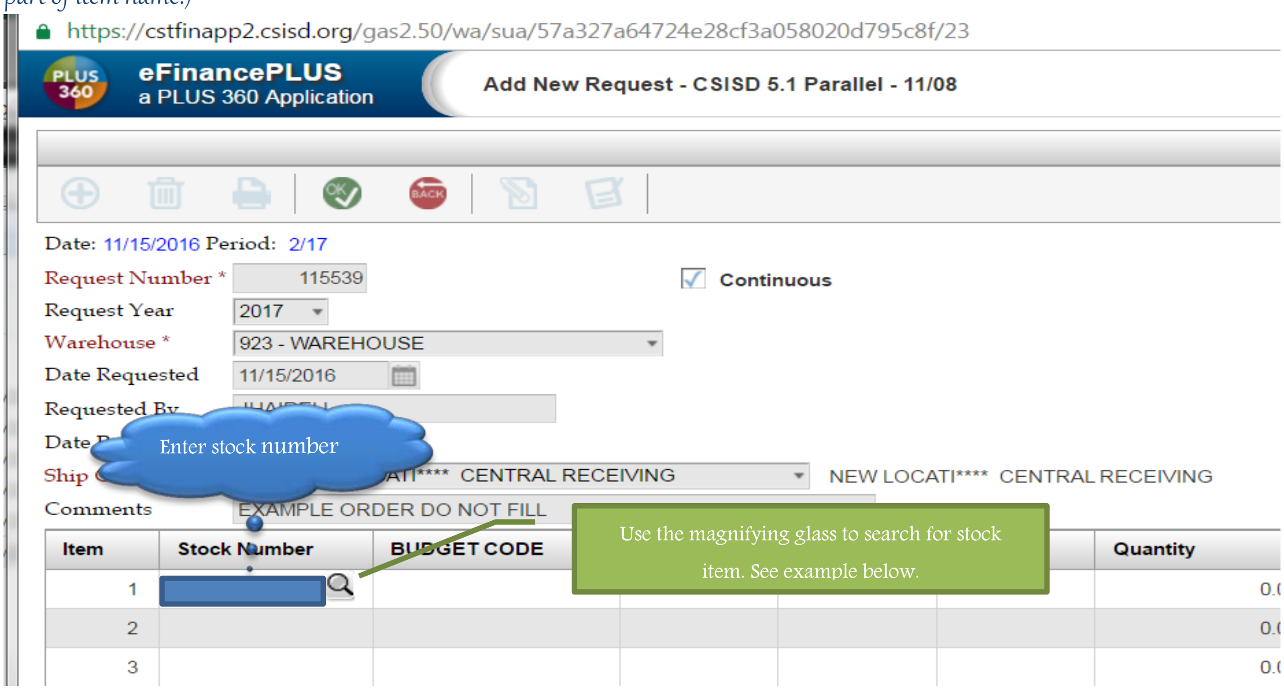
Ship Code: Drop down menu and select campus/department or type in your number to select



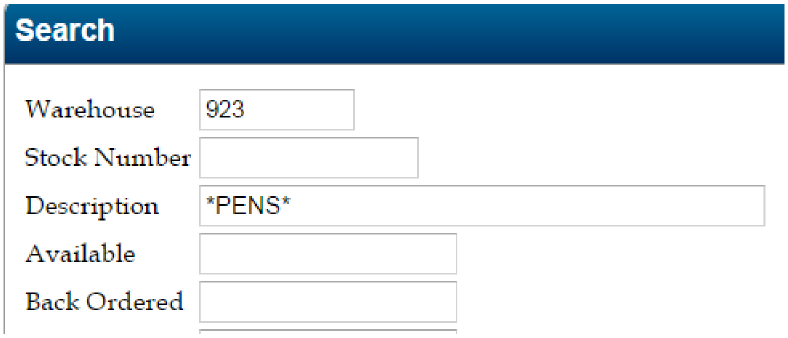
Comments: Enter notes to WH Staff or for your records. Tab to Stock Number

Enter the Stock Number (Catalog number) – This will automatically fill the account field and unit price. (See below.)

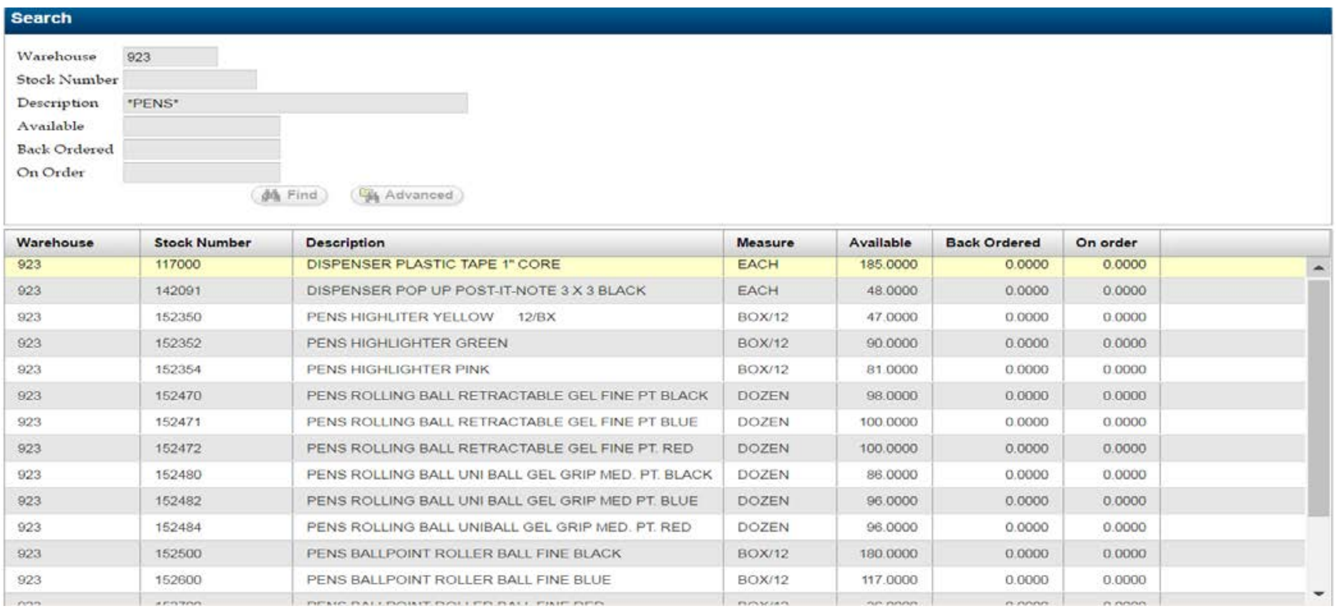
*(**Tip:** You can search the stock items by clicking on the magnifying glass in the Stock Number area. click find to see all stock items or enter all or part of item name.)*



Using Search to locate stock number: Click on the magnifying glass in the stock number box. When page opens enter keyword using asterisks before and after the word. Click Find. You can also leave search areas black and eFinance will bring up all items in the warehouse. See example below:

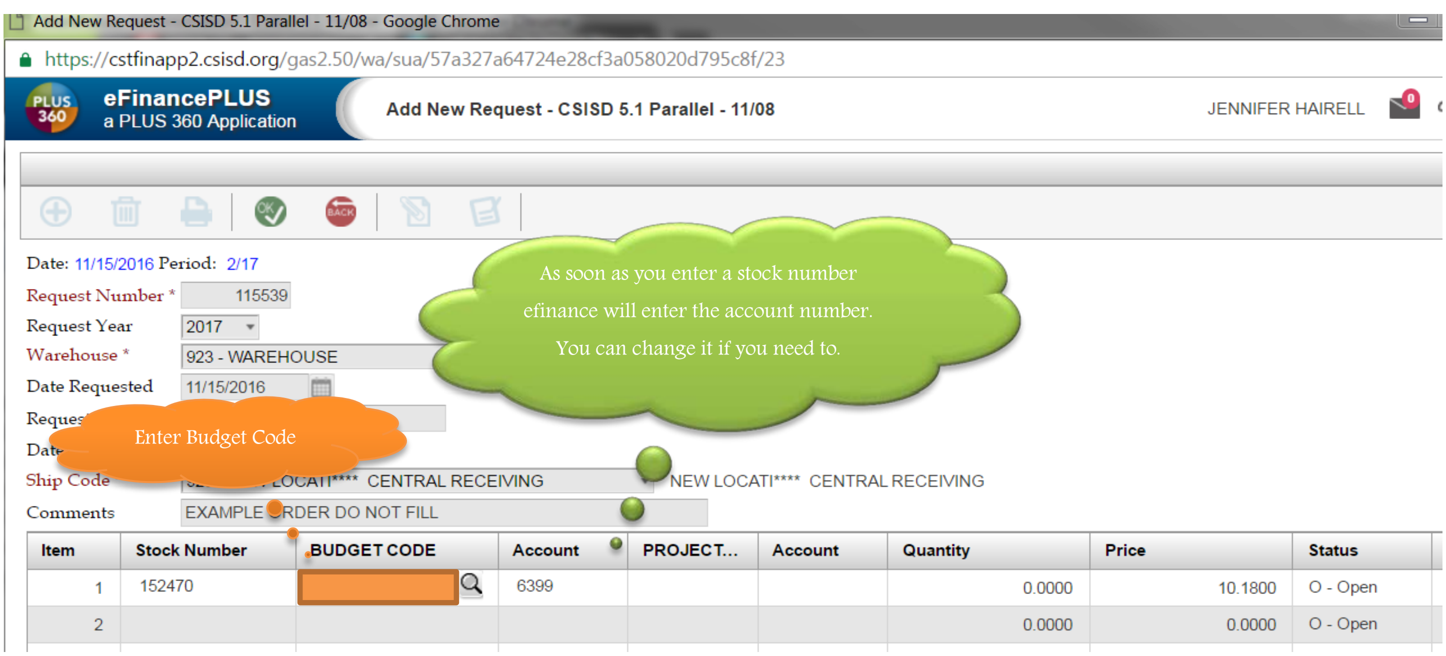


Results:



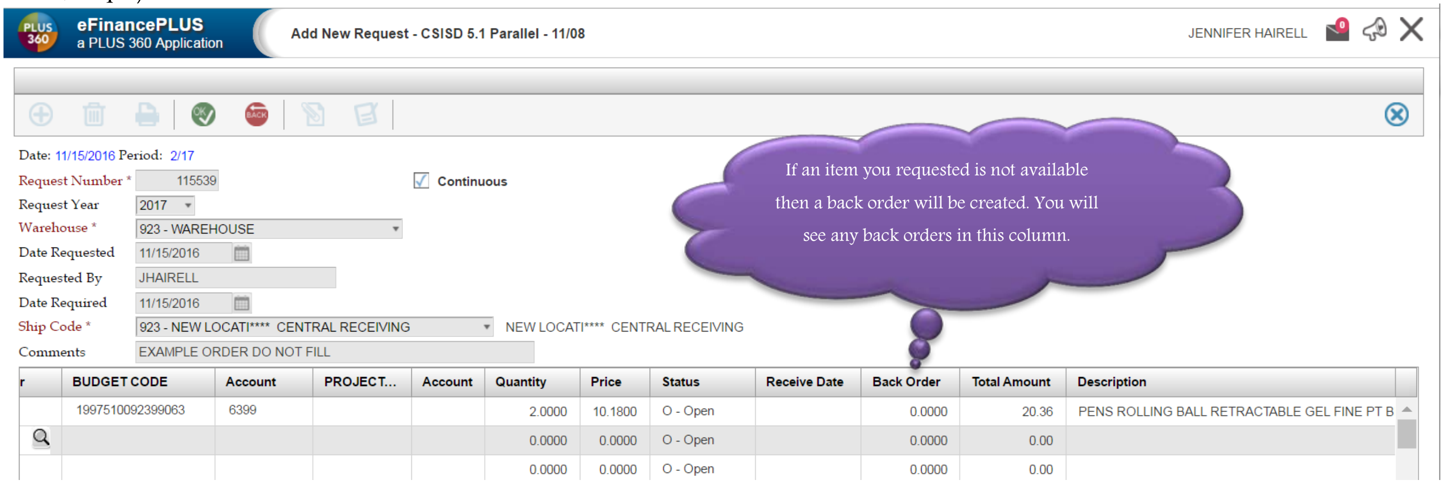
Warehouse	Stock Number	Description	Measure	Available	Back Ordered	On order
923	117000	DISPENSER PLASTIC TAPE 1" CORE	EACH	185.0000	0.0000	0.0000
923	142091	DISPENSER POP UP POST-IT-NOTE 3 X 3 BLACK	EACH	48.0000	0.0000	0.0000
923	152350	PENS HIGHLITER YELLOW 12/BX	BOX/12	47.0000	0.0000	0.0000
923	152352	PENS HIGHLIGHTER GREEN	BOX/12	90.0000	0.0000	0.0000
923	152354	PENS HIGHLIGHTER PINK	BOX/12	81.0000	0.0000	0.0000
923	152470	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLACK	DOZEN	98.0000	0.0000	0.0000
923	152471	PENS ROLLING BALL RETRACTABLE GEL FINE PT BLUE	DOZEN	100.0000	0.0000	0.0000
923	152472	PENS ROLLING BALL RETRACTABLE GEL FINE PT. RED	DOZEN	100.0000	0.0000	0.0000
923	152480	PENS ROLLING BALL UNI BALL GEL GRIP MED. PT. BLACK	DOZEN	86.0000	0.0000	0.0000
923	152482	PENS ROLLING BALL UNI BALL GEL GRIP MED PT. BLUE	DOZEN	96.0000	0.0000	0.0000
923	152484	PENS ROLLING BALL UNIBALL GEL GRIP MED. PT. RED	DOZEN	96.0000	0.0000	0.0000
923	152500	PENS BALLPOINT ROLLER BALL FINE BLACK	BOX/12	180.0000	0.0000	0.0000
923	152600	PENS BALLPOINT ROLLER BALL FINE BLUE	BOX/12	117.0000	0.0000	0.0000

Once you find the item you want double click the item and the stock number will be entered into your request.
If you do not find what you want use the back button to get back to your request.
If you X out of this window you will close your request.
Enter Budget Code. Change Account Number if necessary. (See below)



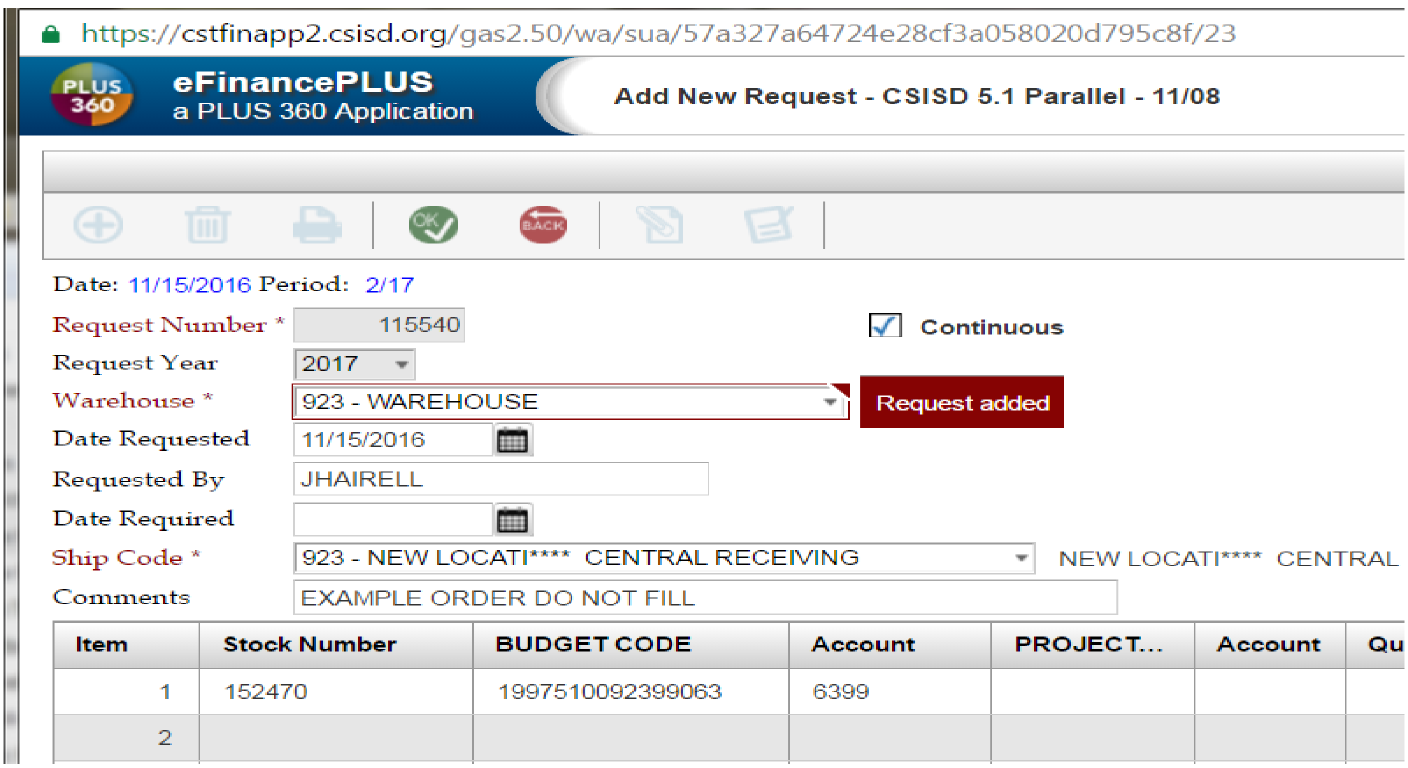
Tab past SUB PROJECT and Account to Quantity. Enter Quantity.

Hit Tab to go to the next line. If you hit Enter you will submit your request.
(You can still add more items if this happens see last page of these instructions.)
Scroll to the right and you will see the unit price and a brief description of each item including unit of measure (i.e. case, ream, 4/pk).



If you are done: Make sure you have written down your request number and Click OK. This will submit your request.

<u>You must click OK to submit the request.</u> Once you hit OK a red flag will pop up next to the Warehouse line stating Request added When you see the screen below <u>the request number has rolled over to a new one</u> and you are ready to enter another request or exit.



And that is all there is to it. If you get stuck or have a question contact Jennifer Hairell x5449 or Robert Taylor x5541.

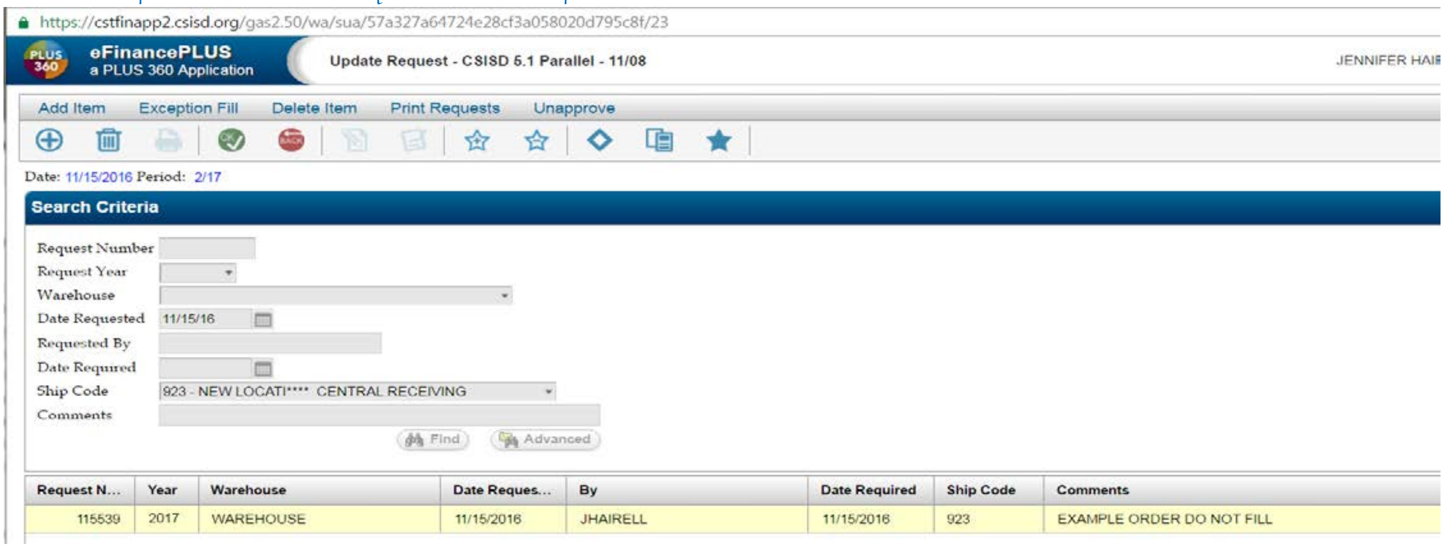
We will be happy to help you out.

TIP: Did you forget something or want to change something or want to make sure your request went through – do the following:

From Warehouse Administration page click on Requests.

You can enter <u>any</u> of the following: the request number, date or the ship code or you can leave them all blank. **Hit find.**

For this example I entered the date requested and our ship code.



eFinance will pull up all the requests related to the information you gave.

If you want to edit the request or check what was ordered double click on the request. Click OK and you will be able to see the items you ordered.

If you want to add an item(s) to the order: Click the order only one time and click on Add Item *at the top of the page. See above.*

If you see a box like the picture below that means we have already processed your order and it cannot be edited not even by us. eFinance will not let you see your order at this point. If you have questions, please contact Robert Taylor or Jennifer Hairell for help with your order.