MUNIS Requisition Entry

Cheat Sheet

1. Open the **Tyler Menu**, then
    a. **Financials**
    b. **Purchasing**
    c. **Purchase Order Processing**
    d. **Requisition Entry**
2. Click **Add.**
3. **Tab** to **General Commodity**; enter a general commodity of the *whole* order.
4. **Tab** to **General Description**; this will auto populate, do not change it.
5. **Tab** to **Needed by**; enter the date when needed. *If you see this message you may ignore it and continue.*

    Warning - Needed by date is not within the defined fiscal year.

6. **Tab** through and ignore **Convert to**.
7. **Tab** through and ignore **Receive by.**
8. In the **Vendor Information** area:
    a. Choose a **Vendor**, *use Vendor Inquiry*.
    b. Choose the correct **Remit** address.
    Important: If the correct addresses are not available in Munis, contact Nicole McFadden in Purchasing.
9. **Tab** through and ignore **Delivery Method.**
10. In the **Shipping** Information area:
    a. Change the **Ship to**, if necessary.
    b. In **Email** and **Reference**, compete as needed.
11. On the **Terms/Miscellaneous** tab through and ignore *all* fields
12. **Tab** to open the line items screen.
13. In **Quantity**, type the quantity desired.
14. **Tab** to **Description** and enter a detailed description. This should match your quote.
15. **Tab** to **Unit Price** and enter the unit price.
16. **Tab** through and ignore all fields until you reach **Account**.
17. In **Account**, type the GL line desired
    a. Click the ... to locate the appropriate GL if unsure.
18. **Tab** to **Amount**.
19. Click **Accept** to save the item.
20. *If you want to order another item from this vendor:*
    a. Click **Add** while in the Line Items screen.
    b. Repeat steps 13-19 as needed.
21. Click **Return** to return to the header.
22. Click **Attach**:
    a. Click **Add**.
    b. Click **Choose File** to import an already-scanned file (locate and choose the file) on your computer.
    c. In **Description** enter e.g., “Vendor quote” or “Bid”.
    d. Click **Accept.**
    e. Click **Return.**
23. Click **Release.**

*Tip: If at any time during this process it seems you are locked out and can’t type, click **Update**.*

Rejected requisition?

Note the requisition number in the email. In Requisition Entry, click Search, type the number in the Requisition number field, and then click Accept. Click Activate in the ribbon, modify as needed, and then click Release.

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Revised: January 29, 2020
Printed: 7/16/2020 1:50 PM