

# WEB LINK REQUISITION INSTRUCTIONS

## Log On:

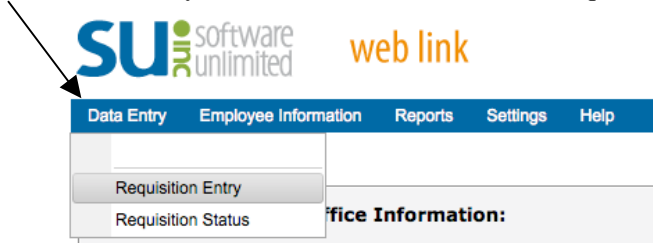
<http://po.central-clinton.k12.ia.us/weblinksq/Login.aspx> (It is recommended to use Firefox as your internet browser.)

**User ID** – first 5 letters of employee’s last name and first 4 letters of first name (use legal name if applicable)-ALL CAPS

**Password** – last 4 digits of employee’s social security number (it is recommended that the user should change their password by hovering over Settings in the menu bar & then clicking on “Change Password,” but it is not required)

## Enter Requisition:


Hover over Data Entry in the menu bar and click on “Requisition Entry” (you no longer have to fill out Batch info)




## Fill in Requisition information as follows:

**Requisition Num** – Leave blank

**Vendor ID** – Type in ALL CAPS if you know the Vendor ID (Push tab above caps lock *not* return when finished typing)

**OR Search** – Click on the  by the **Vendor ID** empty box to search for a Vendor

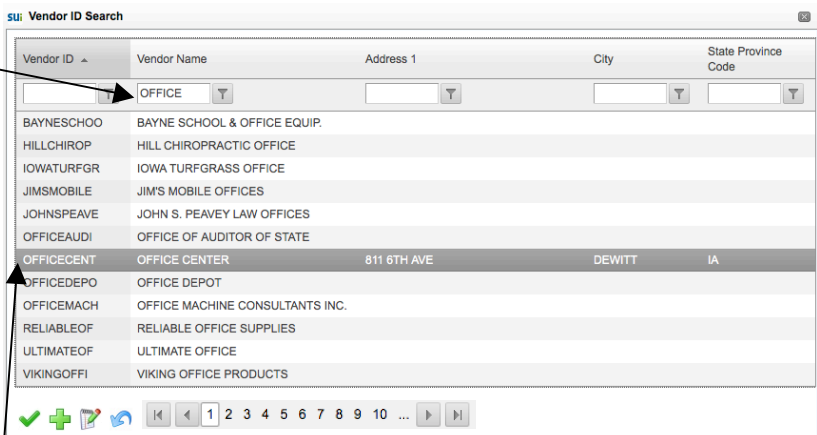
Type in part of name and click on the Filter icon  by the box and select “contains”


**OR**

Type in the first letter and click on the Filter icon and select “starts with”

**OR**

Click on the page numbers at the bottom of the screen to scroll through and look for the Vendor without typing any part of the name above.



Double click on the vendor name or single click and click on the green  to select that particular vendor.

## Vendor Tips:

•If you are planning to use the *school* credit card, enter VISA as the Vendor ID.

•If you can’t find the vendor and think it is a new one, please email or call Karey to have the vendor added.

**Requisition Amt** – Type in the grand total of your purchase (do not use a \$ sign).

*OR Leave Blank* (When you enter Detail lines below it will add the total for you.)

**Requisition Date** – Tab through for default of current date


**Expected Date** – Tab through for current fiscal year. **Put in 7/1/2012 for next fiscal year budget requests.**

**Requisition Desc** – Enter information such as “Send PO to employee,” “CO Fax PO,” “Send Check to Employee,” “Will send over paperwork” etc.


**Ship To Address ID** – Type in CO

**Employee ID** – Tab through

**View/Edit Comments button** – Click on this button if you have additional information.

Click on  under the Account Number heading (this will bring up another screen to fill in).

**Account Number** – Type in the Account Number if known with no dashes in between sets of numbers.

**OR Search** - Click on the  by the **Account Number** box to search for the correct account number. It’s best to click on the numbered pages at the bottom to find the account number that pertains to your department. Double click on the correct account number.

**Detail Description** – Enter a description of the item. If you are using VISA as the vendor, indicate in this description area the entity you will be charging to (Ex. Marriott Hotel or Costumes.com).

**Catalogue** – ITEM # goes here, not the name of the catalog. It is important to enter the correct item number. Please search for item numbers and prices online vs. in a catalog that may be outdated.

**Cost Center** – Tab through – leave blank

**Quantity** – Enter how many of the item to order – Tab

**Unit Price** – Enter price for that item with no \$ sign


**Unit Description** – Tab through – leave blank

**Detail Amount** – Should calculate automatically

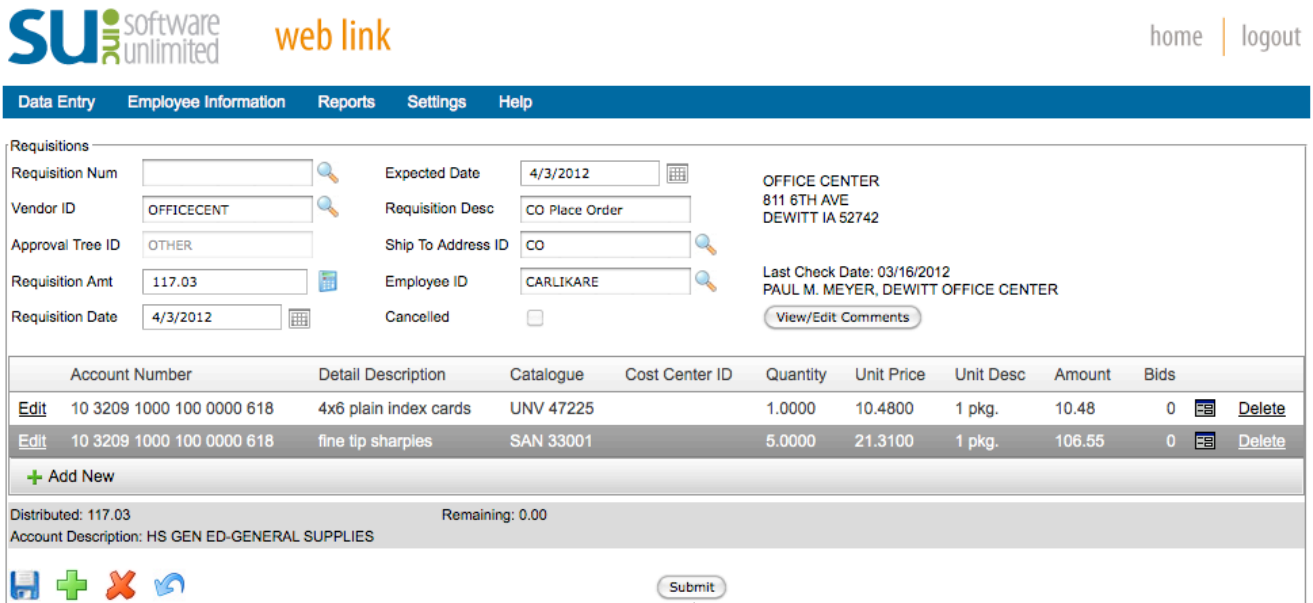
**Split Percent** – Tab through – leave blank

**Click on the Save icon** 

Detail Line Tips:

- You may add more detail lines by clicking on  again if you have more items to order from the same company.
- You may use different account numbers for each line if needed.

Your screen should look something like this:



The screenshot shows the SUi software web link interface. At the top, there are logos for 'SUi software unlimited' and 'web link', and navigation links for 'home' and 'logout'. Below the logos is a blue navigation bar with tabs for 'Data Entry', 'Employee Information', 'Reports', 'Settings', and 'Help'. The main content area is titled 'Requisitions' and contains a form with the following fields: Requisition Num (empty), Vendor ID (OFFICECENT), Approval Tree ID (OTHER), Requisition Amt (117.03), Requisition Date (4/3/2012), Expected Date (4/3/2012), Requisition Desc (CO Place Order), Ship To Address ID (CO), Employee ID (CARLIKARE), and Cancelled (checkbox). To the right of the form, there is address information: OFFICE CENTER, 811 6TH AVE, DEWITT IA 52742, and last check date information: Last Check Date: 03/16/2012, PAUL M. MEYER, DEWITT OFFICE CENTER. Below the form is a table with columns: Account Number, Detail Description, Catalogue, Cost Center ID, Quantity, Unit Price, Unit Desc, Amount, and Bids. The table contains two rows of data: one for '4x6 plain index cards' and one for 'fine tip sharples'. Below the table is a '+ Add New' button and a summary row showing 'Distributed: 117.03' and 'Remaining: 0.00'. At the bottom of the form is a 'Submit' button, which is highlighted with an arrow.

**\*\*Click on the Submit button\*\***

“Requisition was Successfully Saved and Submitted” (If you don’t see this message DO NOT EXIT OUT, your requisition has not saved.)

Click OK. The screen will clear itself and you are able to start a new requisition, run reports or log out.

**(Please send supporting paperwork, quotes, receipts, etc. to Karey with Requisition # written on it or a copy of the requisition report attached to it.)**

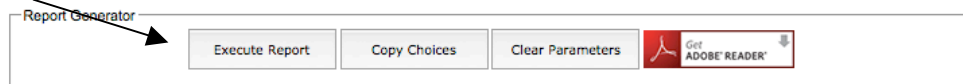
## **Run Reports:**

Click on Reports in the menu bar



**Double click** on whichever report you want to run from the screen that comes up.

**Click** on Execute Report (do not fill in anything else unless you are wanting a specific Req).



**Review the report.** If everything looks OK, you may either print the report or log out. Your order(s) will then be processed through the system. You will receive an email when the requisition(s) have been approved. You may also check back to see the status by logging in and hovering over Data Entry in the menu bar and selecting “Requisition Status.” This will list your requisition(s) and you can see if they have been approved yet.

## **View Past Paychecks:**

To see a past copy of your paycheck hover over Employee Information and click on “Check History Listing”:



web link

The screenshot shows a software interface with a blue navigation bar containing 'Data Entry', 'Employee Information', 'Reports', 'Settings', and 'Help'. A dropdown menu is open under 'Employee Information', showing 'Check History Listing'. An arrow points from the text above to this menu item. Below the menu, a table titled 'Check History Listing' is visible. The table has three columns: 'Check Number', 'Check Date', and 'Amount'. The first row contains the values '37207', '03/20/2012', and an empty cell. A 'View' link is located at the end of the first row. An arrow points from the text 'Click on View to see copy' to this link.

Check Number	Check Date	Amount
37207	03/20/2012	

## **Other Central Office Notes:**

***School VISA Credit Card:*** Can be signed out in Karey’s office at the Admin. Building 8 am-4 pm. Please have a requisition made out to VISA completed and approved previous to picking up the card. Return *itemized* receipts with credit card to Karey (can be sent back through school mail).

***Iowa Sales Tax Exempt:*** Our school district is a tax-exempt entity and there are separate cards indicating as such to take with the VISA card for purchases at Wal-Mart, Best Buy or Staples. There are also copies of our tax-exempt certificate available to be used elsewhere. We are no longer exempt from hotel taxes.

***Local businesses that accept Purchase Orders (present copy at check-out and they will send invoice to CO):***

Barnes  
Flowers On The Side  
Happy Joe’s  
Office Center  
Operahouse  
Pizza Hut  
Scott Drug Store  
Subway  
Theisen’s  
True Value

**Please send receipt to Karey if provided by business at time of purchase.**

***Online Ordering:*** Is limited due to sales tax exemption. Most companies will accept Purchase Orders faxed to them. CO will fax the PO unless otherwise noted by employee on the Requisition.

***Price Quotes:*** If you have received a quote from a company please send it to Karey through district mail by paper copy or electronically with Requisition # noted. Most companies won’t honor the quoted price without a copy of it included with the PO.

***Amazon Orders:*** Karey has a district account set up with Amazon but will need to place all orders. Please put the items wanted into an online cart and send a copy of each page of the cart to Karey by paper or electronically so I can visually see the items needed (there are many versions of the same item so it is easier to see it) and how many to order. Or send the ISBN #'s if those can be found along with how many to order of each item.

***Shipping:*** ALL purchases should be shipped to the Central Office at 331 E. 8<sup>th</sup> St. If you will be receiving a box that has no Purchase Order required (ie: replacement, free or complimentary items from a company) please send Karey an email prior to arrival so the box will be sent to the correct building.

***Reimbursements:*** If you need reimbursed for purchases or mileage driven in your personal vehicle, please find a form on the District Website under Employee Forms called [Travel Costs Reimbursement Form](#). Fill out the form, attach the *itemized* receipts and/or fill in the mileage amount and have your principal sign it. Send it over to Karey for payment.

## **Questions:**

Regarding Accounts Receivable, Requisitions, Account Codes and Insurance can be directed to Cindy, Ext. 704  
Regarding Accounts Payable, Requisitions, Iowa Assessment Testing Results can be directed to Karey, Ext. 711  
Regarding Payroll, Human Resources, and the School Website/Calendar can be directed to Gayle Ext. 701