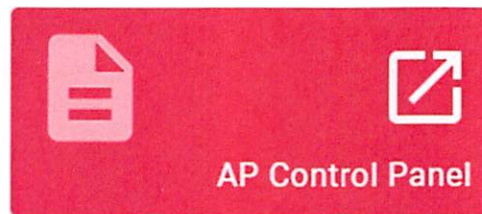


Any questions can be directed to
Angela Martin- A/P Bookkeeper
Phone 802-875-6426
Email: Angela.Martin@TRSU.org

Steps for adding a requisition

1. Go into your Employee Access
2. Click on the Resources box on the lower right side, click on School ERP Pro
3. Click on the AP Control Panel square



4. Click on the the +Add button

A screenshot of the "AP Control Panel" interface. The header is dark blue with the title "AP Control Panel" on the left and "GreenMtnUnifiedFY2324" on the right. Below the header is a "Filter Criteria" section with input fields for "Req. No.", "Department", "PO. No.", "Project", "Vendor", and "View". There are also checkboxes for "Show Paid Column" and "Show Account Detail". At the bottom right of the filter section are "Clear" and "Apply" buttons. Below these is a yellow callout box containing a left arrow and a "+ Add" button. The main area of the panel is empty, with the text "Grid has no data" at the bottom center.

5. Fill in the vendor, requester etc

AP Control Panel GreenMtnUnifiedY2324

Requisition Number
0

PO Number
0

Total
\$0.00

Requisition Detail

Vendor *
Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184

Department *
Green Mountain Union High School

Ship To *
Two Rivers Supervisory Union - 609 Vt Route 103 S - Ludlow, VT 05149

Date
06/16/2023

Requester *
Martin, Angela

Reference

0.33

Requisition Detail

Purchase Order

Addresses

Notes

Order Information

Date Required
07/01/2023

Order Type *
Purchase Order

Order Via *
www

Project *
Undesignated

Award Number

Buyer

Sales Tax Percent
0.0000%

Line Items

Grid has no data.

☐ Hold Account Submit for approval

☐ Add another Cancel Save

6. If your name is not there as a requester, click the + sign next to the requester box

AP Control Panel GreenMtnUnifiedY2324

Requisition Number
0

PO Number
0

Total
\$0.00

Requisition Detail

Vendor *
Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184

Department *
Green Mountain Union High School

Ship To *
Two Rivers Supervisory Union - 609 Vt Route 103 S - Ludlow, VT 05149

Date
06/16/2023

Requester *
Requester *

Reference

0.33

Requisition Detail

Purchase Order

Addresses

Notes

Order Information

Date Required
07/01/2023

Order Type *
Purchase Order

Order Via *
www

Project *
Undesignated

Award Number

Buyer

Sales Tax Percent
0.0000%

Line Items

Grid has no data.

☐ Hold Account Submit for approval

☐ Add another Cancel Save

7. Type your Last Name, First Name the click the okay button

AP Control Panel GreenMtnUnifiedFY2324

Requisition Number: 0

PO Number: 0

Total: \$0.00

Requisition Detail

Vendor*: Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184

Department*: Green Mountain Union High School

Requester*: [Red error: Requester is required]

Requester List (Modal):

- Snowblower, Hank

Buttons: Cancel, OK

Line Items: Grid has no data.

8. Once you have filled in the requisition detail, click the +Add button

AP Control Panel GreenMtnUnifiedFY2324

Requisition Number: 0

PO Number: 0

Total: \$0.00

Requisition Detail

Vendor*: Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184

Department*: Green Mountain Union High School

Requester*: Martin, Angela

Order Information

Date Required: 07/01/2023

Order Type: Purchase Order

Order via: www

Project: Undesignated

Award Number: Buyer: Sales Tax Percent: 0.0000%

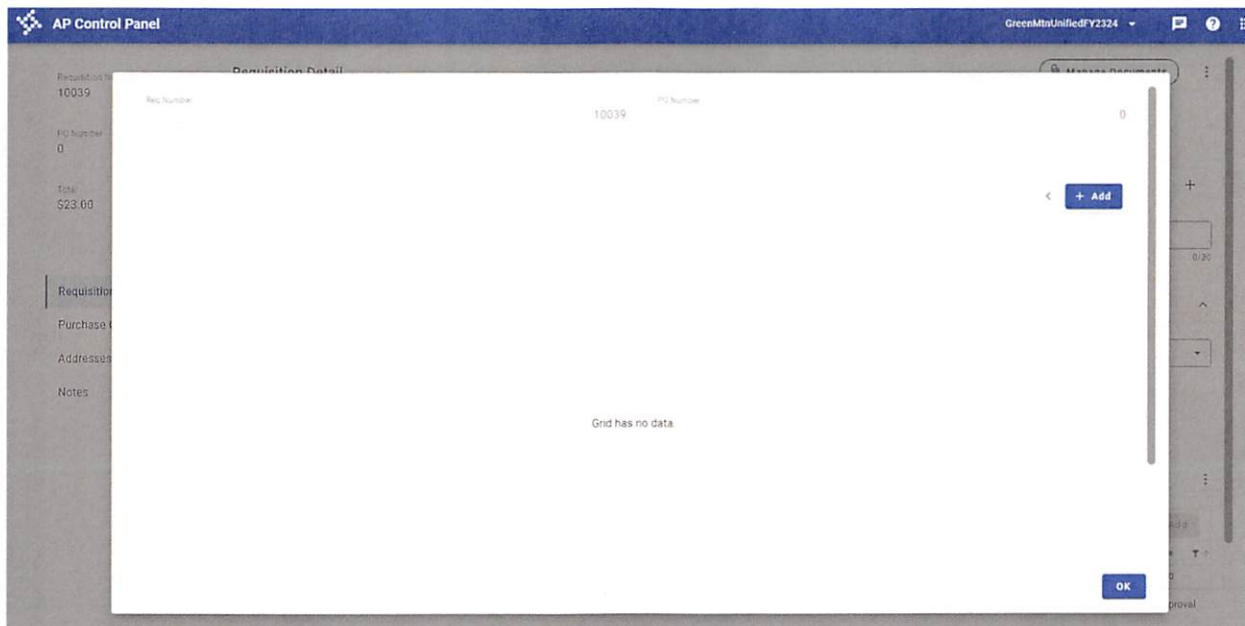
Line Items: Grid has no data.

Buttons: + Add, Hold Account, Add another, Cancel, Save

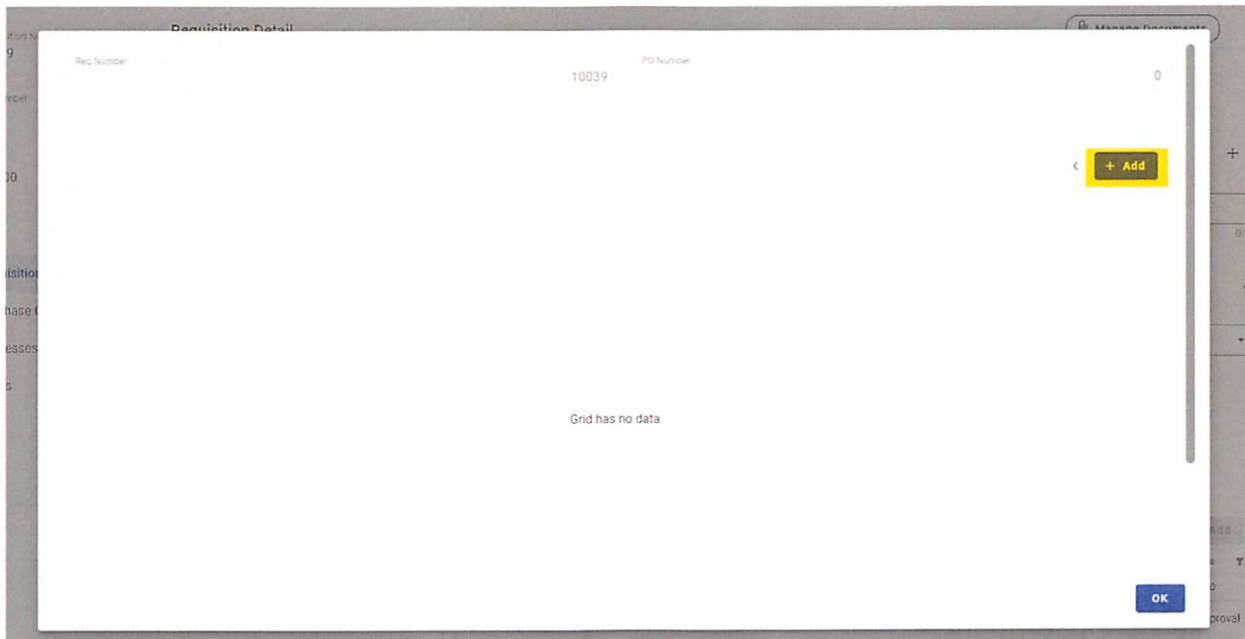
9. Pick the account #, enter the quantity, enter the item #, enter a description of the item you want, enter the price then click the +Add button to add the line to the requisition.

Please make sure you change the description line to what the item(s) is.

12. When you click on the manage document button the below screen will appear.



13. Click on the +Add button



14. Click the down arrow on the document type and pick what kind of document it is then click on the Box- Send document with purchase order then click on Select File

AP Control Panel GreenMtnUnifiedFY2324

Req Number: 10039 PQ Number: 0

Document Type: [Dropdown]

Notes: [Text Area]

☐ Send document with Purchase Order

Select file

Cancel Save OK

15. When you are done adding a document then click on the save button

AP Control Panel GreenMtnUnifiedFY2324

Req Number: 10039 PQ Number: 0

Document Type: 0MU50 check listing # 1279.pdf

Notes: [Text Area]

☐ Send document with Purchase Order

Select file

Cancel Save OK

16. Then click the OK button

AP Control Panel GreenMtnUnifiedFY2324

Requisition Detail

Requisition Number: 10039

PO Number: 0

Total: \$23.00

Reg Number: 10039

PO Number: 0

Document Type: Receipt(s)

Date: 6/16/2023

Notes:

Send Document:

File Name: GMUSD check listing # 1279.pdf

File Type: PDF

+ Add

OK

12. When you click the OK button it should bring you back to your requisition.

AP Control Panel GreenMtnUnifiedFY2324

Requisition Number: 10039

PO Number: 0

Total: \$23.00

Vendor: Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184

Date: 06/16/2023

Department: Green Mountain Union High School

Requestor: Martin, Angela

Ship To: Green Mountain Union High School - 716 Route 103 S - Chester, VT 05143

Reference:

Order Information

Date Required: 07/01/2023

Order Type: Purchase Order

Order Via: www

Project: Undesignated

Account Number:

Buyer:

Sales Tax Percent: 0.0000%

Line Items

Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price
1001 104 31 11 2 2410 5 06 11 00000000 00000000 - Principal Sup.	1.00		80000225551	reward certificates	\$20.0000	\$20.00
	1.00					\$20.00

Hold Account ☐ Submit for approval ☐

Add another ☐ Cancel Save

13. Click the box in front of submit for approval.

AP Control Panel GreenMtnUnifed Y2324

Requisition Number: 10039
 Vendor: Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184
 Date: 06/16/2023
 PO Number: 0
 Department: Green Mountain Union High School
 Requester: Martin, Angela
 Total: \$23.00
 Ship To: Green Mountain Union High School - 716 Route 103 S - Chester, VT 05143
 Reference: 0/30

Order Information

Requisition Detail
 Purchase Order
 Addresses
 Notes

Date Required: 07/01/2023
 Order Type: Purchase Order
 Order Via: WWW
 Project: Undesignated

Award Number
 Buyer
 Sales Tax Percent: 0.0000%

Line Items

Li	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price
1	1001 104 31 11 0 2410 5 0611 00000000 00000000 - Principal Sup	1.00		80000225551	reward certificates	\$20.0000	\$20.00

☐ Hold Account
☐ Add another
☐ Submit for approval

14. Click the Save Button

AP Control Panel GreenMtnUnifed Y2324

Requisition Number: 10039
 Vendor: Amazon Capital Services - PO Box 035184 - Seattle, WA 98124-5184
 Date: 06/16/2023
 PO Number: 0
 Department: Green Mountain Union High School
 Requester: Martin, Angela
 Total: \$23.00
 Ship To: Green Mountain Union High School - 716 Route 103 S - Chester, VT 05143
 Reference: 0/30

Order Information

Requisition Detail
 Purchase Order
 Addresses
 Notes

Date Required: 07/01/2023
 Order Type: Purchase Order
 Order Via: WWW
 Project: Undesignated

Award Number
 Buyer
 Sales Tax Percent: 0.0000%

Line Items

Li	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price
1	1001 104 31 11 0 2410 5 0611 00000000 00000000 - Principal Sup	1.00		80000225551	reward certificates	\$20.0000	\$20.00

☐ Hold Account
☐ Add another
☒ Submit for approval

14. If you want to see what is remaining in an account line all you need to do is hold your mouse over the line and 3 images will show up. Pen- edit the line, trash can to delete the line and then a picture of money with a pen- check budget. When you click

the image the below screen will appear without the black marks.

Account Transactions

Account

1001.104.31.11.0-5.0611.00000000.00000000

Budget

0.00000000

YTD Transactions

\$0.00

Encumbrances

\$0.00

Budget Balance

0.00000000

Pending

0.00000000

Pending Invoices

\$0.00

Uncommitted Balance

0.00000000

Account Budget

0.00000000

FTE

0.0000

Control Group

n/a

OK

Note: If you want to see if your requisition was entered or if you want to see where it is in the approval process go into the portal, into AP Control Panel, where you enter requisitions and click the Apply button. This will bring up everything you have entered in the system.

AP Control Panel

GreenMinUnilever Y2324

Filter Criteria

Req. No.

Department

PO. No.

Project

Vendor

View

☐ Show Paid Column

☐ Show Account Detail

Clear

Apply

+ Add

☒ Req. No. ▼ Req. Date ▼ Req. App. ▼ Vendor Name ▼ PO No. ▼ PO Date ▼ Amount ▼ Status ▼ Next Approver ▼ Next Approver ▼ Department ▼ Requester ▼

Grid has no data.

Receiving a purchase order

1. Login to the portal
2. Click on the three line by the symbol



3. Click on Purchasing & Payables




CellSense 

Common 

Fixed Assets 

General Ledger 

Human Resources 

Legacy Data 

Payroll 

Purchasing & Payables 

Receivables 

Security 

Workflow 


S

4. Click on Receiving

CellSense 

Common 

Fixed Assets 

General Ledger 


Human Resources 

Legacy Data 

Payroll 

Purchasing & Payables 

AP Automation 

Payables 

Purchasing 

Receiving 

Vendors 

Reports 

Configuration 

Receivables 

5. Click on Purchase Order Receiving

Search

← Receiving

Purchase Order Receiving

6. Click on Click the **plus sign/ Add button**

Purchase Order Receiving GreenMtnUnltdFY2223

Filter Criteria

Department: Cavendish Town School District Show Only PO's Ordered By Total Received: 747.00

Clear Apply

Receiving

<input type="checkbox"/>	PO Number	Received D...	Description	Part Number	Qty	Order Adj	User ID	Item Number	Notes	Department	Vendor Ord...	App...
<input type="checkbox"/>	301231107	01/18/2023	Testing Snack ...	B09MDJK6LS	1	0	jennifer harper			Cavendish Tow...	Amazon Capit...	

< + Add

7. Either click on the Purchase Order # box or start typing the PO #

Add Received Items

Purchase Order Information

Purchase Order Number *

Purchase Order Number is required.

8. Double click on the on the QTY box & enter in the QTY you received

Purchase Order Receiving

GreenMtnUnifiedFY2324

Purchase Order Information

Purchase Order Number *

301240006 - 10008 - All Learners Network LLC - Chester Andover Elementary School - Chester Andover Elemen X

Vendor

All Learners Network LLC

Send To

Chester Andover Elementary School

Department

Chester Andover Elementary School

Requester

Shanna McCarthy

12/23/24

12/23/24

Purchase Order Line Information

Description	Unit	Qty	Unit Price	Order Qty	Order Price	Part Number	Item Number
S McCarthy- All Learners Network		0		0		7/1269-A/30-24	

☐ Add another

Cancel

Save

9. Do Step #8 for every item received on the requisition.

10.Repeat steps 7, 8 & 9 if you have more POs to receive items on.