



Monticello Community School District

Web Link

Requisition Entry Instructions

LOGGING IN: Go to this Web Link Address: <https://wl.sui-online.com/MonticelloIA>

User ID: first 4 initials of your last name, followed by first 4 of your first name

Password: last four numbers of your Social Security #

(When you login into Web Link for the first time you will need to change your password immediately after logging in by selecting the Settings menu, and then Change Password.)

Data Entry (Requisitions)

The Data Entry option is used to enter requisitions. Once a requisition is entered and saved, the requisition must be submitted for approval. Once a requisition is approved, it is converted to a purchase order by the Business Office and submitted to the vendor. A separate requisition must be created for each vendor that you are requesting items from. The Requisition Entry option can also be used to edit (and resubmit), cancel, or delete rejected requisitions.

Select the **Data Entry** menu and then **Requisition Entry**:

The screenshot shows the SUI Software Unlimited +wl web link interface. At the top, there are logos for 'SUI software unlimited school accounting system' and '+wl web link'. Navigation links for 'Home', 'Data Entry', and 'Employee Info' are visible. The main section is titled 'Requisition Entry' and contains a form with the following fields:

- Approval Tree ID
- Requisition Number
- Vendor ID
- Requisition Amount
- Requisition Date
- Expected Date
- Requisition Description
- Ship To Address ID
- Employee ID (pre-filled with 'PETERHON')
- Cancelled (checkbox)

On the right side, there is a 'Your Comment' text box and a 'Comments' section with the message 'No records to display.' At the bottom right, there is a 'Detail Information' link.

1. **Approval Tree ID:** **required**. The Approval Tree ID designates the route your requisition will take through the approval process. The Approval Tree ID defaults to the building or department you are assigned to. Should you need to change to another Approval Tree ID, click on the magnifying glass icon and select the appropriate Approval Tree ID. It is important to use the correct Approval Tree ID to avoid delays in approval.

2. **Requisition Number:** **required**, but will be auto-assigned when you save your requisition.

3. **Vendor ID:** **required**.
 - Click on the **magnifying glass icon** to search for the vendor.
 - To narrow the search and find the vendor, **type** the first few letters of the vendor in the **Vendor Name box**; then click on the Vendor Name **filter icon** (looks like a funnel). {The best filter options are “Contains” or “Starts With”}. (We have a lot vendors, so if you need help finding a vendor name, please call or email the Business Office.)
 - When you click on the **filter icon**, a list will appear with the results that match your search criteria. **Double click** on the vendor, or click on the vendor name and then the green ✓ to select and populate that vendor into the Vendor ID field.
 - If you need to order from somewhere that does not take a purchase order and the items can be ordered using the school credit card, please use REGIONS COMMERCIAL BANKCARD as the vendor and under the description enter what needs to be ordered & from where.
 - If the vendor you wish to use is not listed, it can be added as a new vendor. Call or e-mail Judy @ ext. 5200 or Marcy @ ext. 5300. You will need to provide a complete vendor name, address, and phone and fax numbers. You will be notified as soon as the vendor has been added.

Vendor ID	Vendor Name	Address 1	City	State
125THCELEB	125TH CELEBRATION	110 WEST ASH	BERESFORD	SD
2006WGICON	2006 WGI CONFERENCE	650 LAUREL AVENUE #402	HIGHLAND PARK	IL
2008SDREAD	2008 SD READING CONVENTION	PO BOX 268	WAKONDA	SD
2012RELAYF	2012 RELAY FOR LIFE OF UNION COUNTY	4904 SOUTH TECHNOPOLEIS DRIVE	SIOUX FALLS	SD
20GAPCONTR	20 GAP CONTROL DEFENSE	12702 BARRETT ROAD	YAKIMA	WA
2NDWINDEXE	2ND WIND EXERCISE EQUIPMENT	605-978-9202		
3RDSTREETG	3RD STREET GRILL & CATERING	216 NORTH THIRD STREET	BERESFORD	SD
3XGEARLLC	3X GEAR LLC	2920 6TH STREET EAST	WEST FARGO	ND
4HCCOFFICE	4-H/CCI OFFICE	405 COFFEY HALL	ST. PAUL	MN
4N6FANATIC	4N6 FANATICS	1230 NORTH WACO	WICHITA	KS
A0XWELDING	A-0X WELDING SUPPLY COMPANY, INC.	PO BOX 86667	SIOUX FALLS	SD
A1PORTABL1	A-1 PORTABLE TOILETS	PO BOX 88504	SIOUX FALLS	SD

3608 items in 301 pages

4. **Requisition Amount:** **required**. It is not necessary to enter an amount. Click on the calculator icon at any time to see the requisition total, either as you are adding items or when you are finished.

https://wl.sui-online.com/BeresfordSD/Requisitions.aspx?reset=1

File Edit View Favorites Tools Help

Laptop Request Form Infinite Campus Lexmark E260dn Desktop Pictures Free Hotmail KELO NWS Sioux Falls, SD Schoolw

SU software unlimited
school accounting system

+wl
web link

Home Data Entry

Requisition Entry

Approval Tree ID 🔍

Requisition Number 🏢

Vendor ID 🔍

Requisition Amount 🧮 Calculator Icon

Requisition Date 📅

Expected Date 📅

Requisition Description

Ship To Address ID 🔍

Employee ID 🔍

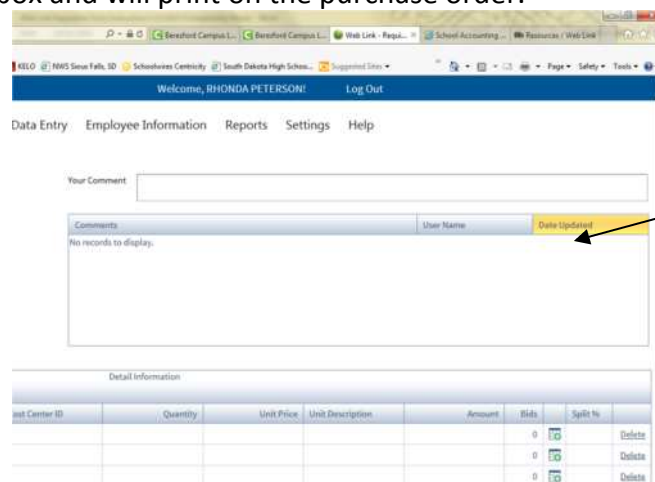
Cancelled

5. **Requisition Date:** **required.**
 - Enter the **current date**
6. **Expected Date:** **required.** Use the same date as the **Requisition Date.**
7. **Requisition Description:** **required.** Enter a short description of your choice for your reference. Example: supplies, equipment, repairs, etc.
8. **Ship To Address ID:** **required.** This field should auto populate based on your log in.
9. **Employee ID:** **required.** This field auto populates based on your log in.
10. **Detail Lines:** **required.** **Each item you are requesting needs to be entered on a separate detail line.** (If you have multiple items to order, you may also type a general description and then put “see attached list” and type up a list in Excel and send the list to Judy so she can attach to the PO when it is ordered if that is easier for you.) The entry screen populates with ten rows. If you are requesting more than ten items, you can add more rows by clicking on the green + sign by “Add Rows”.

- **Item Number** – enter the **item number** of the item requested.
 - **Quantity** – enter the quantity of the item requested.
 - **Unit Price** – enter the unit price of the item requested.
 - **Unit Description** – enter the unit (Example: each, case, box, etc.)
 - **Detail Amount** – will auto-populate based on quantity and unit price as you tab through.
 - **Split Percent** – used for shipping; currently leave blank.
- **When you have entered all the items you are requesting, please be sure to add a detail line for SHIPPING if you are going to be charged shipping.**
 - Enter the account number.
 - Enter the word “shipping” in the detail description.
 - If you know the exact cost of shipping, enter 1 in the **Quantity** box and enter the amount of the shipping in the **Unit Price** box. If you do **not** know the exact cost of shipping, you can make an entry in the **Split %** field for estimated shipping. To do this, leave the **Quantity** and **Unit Price** boxes blank. Enter 15% followed by the requisition total in the **Split %** field. (Example: 15%35.00) Omit the dollar sign in your entry. **Or you can estimate the amount of shipping.**

Detail Information												
Print	Post	Account Number	Detail Description	Item Number	Cost Center ID	Quantity	Unit Price	Unit Description	Amount	Bids	Split %	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10 1131 000 411 000	SHIPPING						5.25	0	15% 35.00	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>									0		Delete

- **Comments:** optional. You can add comments to your requisition if you feel you need to provide additional information. Such as a link to order the items if necessary. **This is a good spot to add what you would like done with the purchase order (fax, email, I will order, etc.)** Comments may also be added by approvers as your requisition is moved through the approval process. All comments can be viewed in the Comment box and will print on the purchase order.



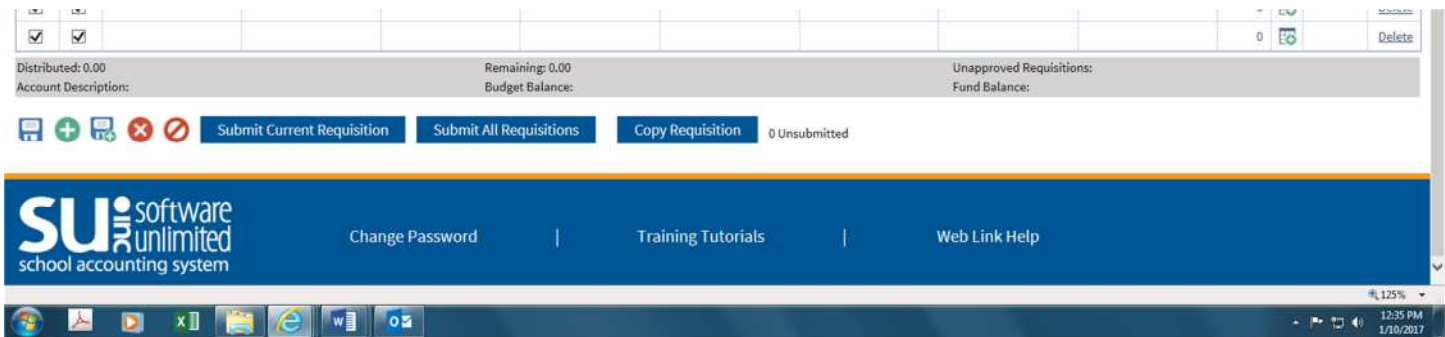
Click here to add a note or comment.

11. Save – if you are not ready to submit your requisition, click on the **Save** icon on the bottom left (3.5” floppy ☺). You will be able to log out of Web Link and return at a later time to finish and submit.

To re-open a saved requisition:

- Select the **Data Entry** menu and then **Requisition Entry**.
- Click on the magnifying icon next to the **Requisition Number** field.
- A search box will open listing your saved requisitions.
- Double click on the **Requisition Number** of the requisition you want to continue. The requisition will open in the entry screen. Make any additions or adjustments to your requisition.

12. Important Final Step!! – If you are ready to submit your requisition, click on the **Submit Current Requisition** button at the bottom. You should get a message box that states “Requisition was successfully saved and submitted”. Click on **OK**. You also have the option to submit all saved requisitions at one time by clicking on the **Submit All Requisitions** button.



*****PLEASE REMEMBER TO SEND OVER ANY SUPPORTING DOCUMENTATION THAT NEEDS TO GO WITH YOUR PURCHASE ORDER (Invoice, registration form, packing slip, order form, etc.)**

Additional Tips for Using Web Link:

1. You must have the web browser on your computer set to allow pop-up windows in order to use all functions in Web Link properly. The settings to allow pop-ups can be defined for just the web server used for Web Link if desired. Contact the Technology Department for assistance with allowing pop-ups.
2. When navigating in Web Link, use the Tab key or your mouse to move from field to field.
3. Refer to the Help File (accessed by selecting the Help menu, then Web Link Help) for step-by-step instructions on using the options in Web Link.
4. When exiting Web Link, always click the Logout option in the upper right corner to ensure your user ID does not get 'locked' by the system (act as though you are still logged in).