Create Project Requisitions

- Click the **Create Requisitions** entry point. The Select **PROJECT**

https://erpsis-help.frontlineeducation.com/hc/en-us/articles/360037824713-Creating-a-Project-Requisition

- Select a **Fiscal Year** from the drop-down list.

- Click the **Continue** button. The Create Project Requisition tab appears.

- The **Category** and **Vendor** fields are related. If you select a Category first, the vendor field is populated with those vendors that are assigned to the category you selected.
- If you select a Vendor first, the category field is populated with those categories that are assigned to the vendor you selected.
- Choose **Order from:**

- The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.
- Select the **Ship-To Location** from the drop-down list.
- Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
- Enter a **Description**.
- In the **Justification** field, the Buyer will enter the Bid Justification. You will not enter in this field.
- **Under Create Project Requisition Description:**
- Enter **Description** in box
- Click in the cell under the **Total Amount** column to change the total amount.
- Click the (**click to add account**) link to enter the account number. The Edit Accounts pop-up box appears.

- Enter the account number, or click the icon to select another one from the **Account Numbers** tab.
- Select the **Year** from the drop-down list.
- Select the **Owner** from the drop-down list.
- The **Percent (Prct)** field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

- Optional. Click the plus icon to add another account number for the requisition. Repeat steps 17 through 21, and ensure that the Percentage fields for all accounts add up to100.
- Use the Action column (trash can) to delete a line item.
- Click the **OK** button. The new account number is populated in the Account Number column.
- Click the **Submit** button.
- The Select Requisition Type tab appears with a message that the project requisition was successfully saved.

Adding Authorized Buyers

- Click **Notes**
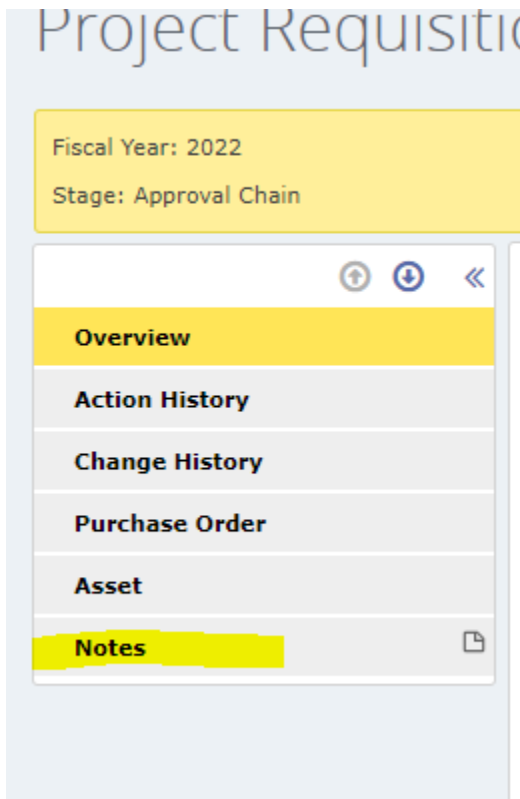
- **Add** Authorized Buyers to **Notes Box**
- Private: **Select** No
- Internal Only: **Select** No
- Communication Method: **Select** Email
- **Click** Add

Notes List/Detail

Notes

Notes: ★   Authorized Buyers: Laurie Pruett

Characters remaining: 1968   *(2000 max)*

Private: ★ ○ Yes   ● No

Internal Only: ★ ○ Yes   ● No

Communication Method: Email   ⌄

➕ Add   **✎ Clear**

Releasing Funds on Project Requisitions

In the SEARCH BOX, type **Search** and choose **Blanket/Project Requisition Search**
Req. Type: Choose **Project**
Click **Search**

Click on **Purchase Order Detail Lines** and Click **Maintain**

Click on the Released Amount blue hyperlink $ amount under Project
Requisition Overview Description.

Enter **Amount in the New Release Amount box.**

Click **Release** and close box by clicking the **X** in the top right corner

Click **Submit**

A **Send Revised PO** box will appear and you Click **No** and then Click **OK**