# How to Create a Requisition

*Frontline ERP for California (Web Version)*

**1** Log in to Frontline – ERP Web: https://yoloonline6.xcoe.online/escape/#/sign-in

**2** From the Home Page, select "**Requisitions**".

**3** Select "**Vendor Requisitions**".

**4** Click on "**New**".

**5** Select dept and fiscal year: Ex. "**GENERAL – 2026/27**". This will take you to the Vendor requisition Form.

**6** **Fill out the following fields from each section.**

**NOTE:** Fields with "*" are required fields and cannot be left blank.

### REQUISITION

Fill out the following fields:

- Requisitioner*
- Request Date*
- Order Location*
- Delivery Location*
- Purchase Reason*
- Order Type*

Requisition

Requisitioner * | Request Date * | Order Location * | Delivery Location * | Purchase Reason * | Order Type *

### VENDOR INFORMATION

Select "Vendor" – Once selected, this will auto fill the vendor's address.

Vendor Information

Vendor * | Vendor Address

### PO INFORMATION

Fill out: PO Date, Delivery date, Ship Via, Terms, FOB. Leave blank if none.

PO Information

PO Date | Delivery Date | Ship Via | Terms | FOB

### ORDER COST INFORMATION

Enter Shipping Amount if there is. Can be left blank.

Order Cost Information

Shipping Amount $ | Tax Amount $ | Taxable | Total Cost $

### ACCOUNTING INFORMATION

Account Distribution Option: 0 – **Account Manual**

Accounting Information

Account Distribution Option * 0 – Account Manual | Acct Distributed Amt $ | Account Expended $ | Acct Undistributed Amt $

### SUMMARY/STATUS INFORMATION

On Hold* = Yes/No

Summary/Status Information

On Hold * No

### ITEMS

- Click "Add" to add items.
- Enter Order Quantity, Order Unit, Description, Unit Price, Taxable* (Yes or No).
- Click "Done" when done.

+ Add

| Order Qty | Order Unit | Description | Unit Price | Taxable |
|---|---|---|---|---|
| 1 1 1 | EACH | Supplies & Materials | $100.00 | Yes |

### ACCOUNTS

- Click "Add" to add account(s). Type in the account number.
- Repeat to add more accounts.
- To delete an account, click the Delete icon (x).

+ Add

| Account Number | Percentage | Amount | Delete |
|---|---|---|---|
| 01-0000-0-1110-1000-4300-000-000 | 100.000 | $100.00 | |
| | Total | $100.00 | |

### ATTACHMENTS

- Drag and drop one or more files into the upload area.
- To include an attachment when the purchase order is emailed, select "**Yes**" for "Include with Emailed PO*".
- Put the vendors email on the comment.

Drag and drop files here or Upload a File

### NOTES

- Click "Add" to add the vendor email.

+ Add

| Note |
|---|
| Vendor Email: vendor@company.com |

**7** Once done, click "**Save**" on the top of the form.

**8** Go to "**Tasks**" and click "**Submit**" to submit your requisition for approval.

**9** Done.

**Need Help?**

Contact the **Fiscal Services Department**.

# ERP PO Guide – Choose the Right Order Type

## 1 BLANKET PO

A pre-approved budget for ongoing purchases from the same vendor. You can track the remaining balance in ERP and see when funds are getting low.

Order Type * 4 - Blanket PO

**EXAMPLES**

- Amazon
- Raley's
- Office Depot
- Culligan
- Any Catering Vendor
- Toshiba printer

## 2 PO WITH RECEIVING

For items to be delivered. The items must be received/entered in ERP before Accounts Payable can pay the invoice.

Order Type * 3 - PO with Receiving

**EXAMPLES**

- Equipment
- Furniture
- Technology Items
- Books/Planners
- Custom apparel

## 3 PO W/O RECEIVING

The invoice can be paid without entering a receipt transaction.

Order Type * 2 - PO w/o Receiving

**EXAMPLES**

- Professional Services
- Software Licenses and Subscriptions
- Annual Renewal
- Service Contracts
- Online Curriculum
- Field Trip Tickets – Additional documents are required on the day of the trip. Email accounts payable for more information.

**Need Help?**

Contact the **Fiscal Services Department.**