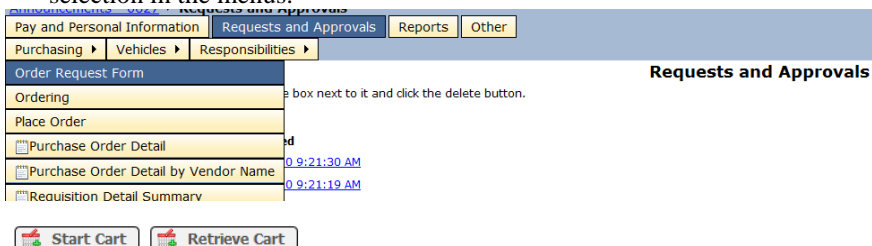


## A Guide to Using

# Online Order Request

The Online Order Request allows the user to create an electronic order request form for any active vendor in your district's SMART Finance vendor listing. Go to the Smart Systems SMARTeR website. If you do not already have the website bookmarked, go to the schools website [www.barnesville.k12.mn.us](http://www.barnesville.k12.mn.us). Click on Useful Links and Region I Payroll. On the login screen, select ISD 146, enter your payroll ID and your password. If you do not know this information, contact Pat Berndt

1. Follow **Login to Online Ordering** procedures for SMART eR
2. Click the **Requests and Approvals|Purchasing|Order Request Form** selection in the menus.



Previously saved carts are automatically deleted by the system after two weeks.

3. To start a new order, click on the “Start Cart” button. To retrieve a cart, click on the “Retrieve Cart” button.

### Start Cart

Employee LYNN CANTU	Date 12/14/2011	Requested Fiscal Year 2012	Ship to Location		
Comment					
Vendor Group 1	Vendor Code	Alternate address	Vendor Fax#		
Vendor Name					
Transfer					
Item/Description	Units	U.Type	Rate	Discount	Total Cost
<input type="text"/>	<input type="text"/>	EA	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Request Total:					0.00

Fields with a colored background need to be entered before saving.

SMART eResources v11.3.0.0 [Visit our About page](#)

4. The **Requested Fiscal Year** will auto fill in, change if necessary.
5. Select a **Ship to Location** from the drop down list. This is a required field and something needs to be entered there.
6. Enter any comments necessary. The **comment** field would be used for any information that the user would like the Business Office to know such as; a specific grant is to be used for coding or perhaps a specific site should be charged for the items, etc. It can be left blank also.

7. **Vendor Code** is a required field (\*). Enter a Vendor Number or click on “Find” to display all vendors.
  - a. If you click on Find - Select a vendor from the list. If your vendor is not listed, please contact the Business Office to create a vendor for you.
8. If there is an alternate vendor address, enter the Address Code into the **Alternate Address** field or click on Find for an available list.
9. In the **Item/Description** field, enter the catalog number and the item description.
10. Enter the number of **Units**.
11. The Unit Type(**U. Type**) will default to EA. Change it if necessary.
12. Enter the **Rate**.
13. Enter a **Discount** if needed. The field allows up to 7 digits such as 00.0000% or 000.000% if needed.
14. Click the “Save” button to save your row.
15. It will automatically calculate the **Total Cost** per row and the Request Total.
16. Click the “Add New” button if you wish to add another row. *(New in 11.3: This was changed because of people losing the items in their cart by having their session expire, connection issues, etc. The most that can be lost now is 1 row of the order instead of the entire order.)*
17. At this point, you can repeat the above steps until finished.
18. If you “Add to Cart” - you will get a message telling you that your cart was saved.
19. Otherwise, when finished with all rows, click on the “Transfer” button.
20. You will receive the message “Your Order Request has been transferred to SMART Finance”.
21. If you wish to place another order, repeat the above steps. Otherwise Logout (see **Logout** procedures).

## To retrieve items from a Saved Cart

1. Click on the “Retrieve Cart” button at the top of the page.

The screenshot shows the top navigation bar of the 'Order Request Form'. The tabs include: Announcements, Requests and Approvals, Purchasing, Order Request Form (active), Pay and Personal Information, Reports, and Other. Below the tabs are buttons for 'Start Cart' and 'Retrieve Cart'. A note states: 'Previously saved carts are automatically deleted by the system after two weeks.' Below this is a section titled 'Choose a cart to open' with five dropdown menus: Vendor Code, Location Code, Fiscal Year, Group Code, and Order Date.

2. Enter values in each of the drop down lists and then it will display that request that was selected.
3. Continue following the previous steps to add/remove items as needed.