

# **ESCHOOL MALL (ESM) FREQUENTLY ASKED QUESTIONS**

- **What do I do if I cannot find my vendor under the Catalogs listed in ESM??** Not all vendors will have a ‘Catalog’, but that doesn’t mean you can’t buy from them. Click [Manual Item Entry](#) and you will have the option to search for the vendor by name, number or City/State.
- **What if I still cannot find the vendor I need under Manual Item Entry?** Try searching for just one word in the vendor’s name, for example search for “Barren” when looking for Barren County Business. Less information is better because if Barren County Business is listed as *Barren Co. Business* and you are spelling it out, you won’t find it. If you are still unable to find the vendor, please email the vendor name and address to Kathy Phelps or Kim Lawrence at Central Office. As long as the vendor is an allowable vendor, they can be added. Otherwise we might encourage you to contact a vendor on the bid list. Bid list link is listed below.  
<http://www.kybuy.org/bidbook/current/selectvendor.asp?Member=571&Submit=Next>
- **What if I have found my vendor, but the address or other contact information is incorrect?** Contact Kathy Phelps or Kim Lawrence and they can make any necessary changes to the vendor.
- **What does “Dynamic Link” and “Punch Out” mean next to the Catalog vendors?** If a vendor has the option of a Dynamic Link or a Punch Out, you want to be sure and utilize this feature. This allows you to shop through the vendor’s website and

then your shopping cart will automatically be transferred to ESchool Mall upon Checkout.

- **What do I do if I have already submitted my requisition and I need to make a change?** Changes cannot be made to the requisition once it has already been submitted. You can check the status of your requisition and have the next approver return the requisition to you to make any necessary changes. Once the requisition has been returned to you and your changes have been made, you can resubmit.
- **How do I delete a requisition that has not been submitted?** Open the requisition by clicking on the requisition number. There will be a 'Remove' box next to each line item. Click 'Remove' for all items in the requisition and then click 'Save'. This will delete your requisition.
- **How do I delete a requisition that has been submitted?** You cannot change a requisition until it has been returned to you. Once the requisition has been returned to you, you will follow the steps above.
- **Why isn't my discount and/or price change being reflected in the Total Balance?** After changes have been made to the requisition prior to submission, it is important to click 'Save' to refresh the screen so that the changes can be reflected.
- **Why is my requisition being shown as 'Returned'?** If a requisition is being shown as returned, that means that you need to make some changes before it can be further processed. An approver must provide a reason for returning a requisition and this reason shows up near the Product Description.
- **Why is my requisition being shown as a Pre-Encumbrance Maintenance Transaction?** This is usually

due to an account coding error. If you are responsible for coding your requisitions, be sure they are coded in the appropriate format. (ex: 0002118-0610-3104) Pay close attention to the location of the dashes. Account codes must be formatted in this way or ESM will kick it back once someone approves it. Another common reason for Maintenance is the account not being setup in Munis. If so, Kathy Phelps can correct these errors in Finance.

- **How do I correct a Pre-Encumbrance Maintenance?**

Click on **Approval>Pre-Encumbrance Status**. Select the requisition to the left and click 'Select'. Then click 'Undo All' and 'Submit'. This returns the requisition to you to make changes. Click 'returned' under the 'Approval Tab'. Select the requisition to the left again and click 'Select'. You can now make changes to the account number and then 'Submit'. *See screen prints at the end of this document for a demonstration of this process.*

- **Why is my requisition being shown as a Pre-Encumbrance Maintenance Transaction with a Status of "Live unit price .00000 is invalid? Must be a positive number"?**

ESM does not allow items to have a zero price. For free items we suggest listing them as a penny and deducting this from the other line item totals to arrive at your correct total price. To make this adjustment you must go through the steps listed in the bullet above.

- **Why have I not received a copy of my purchase order?**

At any time you can follow up on your requisition by clicking on the requisition number and looking under the column heading "Next Approver/Status". This will either list the next approver, Returned, Complete or PO Released. If it says anything other than, PO Released, that means that a PO has not been assigned

yet. If a PO has been assigned, you can follow up with your bookkeeper or Darla Wood.

- **Why did my Ship To address change to Technology?**

When technology approves requisitions, they sometimes will change the Ship To Address to their location so they can be in charge of ordering the items. They will forward you a copy of your purchase order once the item is received.

# How to correct a 'Pre-Encumbrance Maintenance Transaction'

Select – Approval>Pre-Encumbrance Status

**esm solutions**

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Select a Solution from the list to begin.  
Or, click an activity link below to access tasks available to process.

**Solutions**

- [easyPurchase](#)

**Information Desk**

- [Product Manuals](#)
- [Product Enhancements](#)
- [Implementation Support](#)

**Customer Care**

- [General Feedback](#)
- [Enhancement Request](#)
- [Customer Support](#)
- [easyPurchase Help](#)

**easyPurchase - you have...**

- 25 Requisition Approval(s) to process - [Approval>Summary](#)
- 2 Pre-Encumbrance Maintenance Transaction(s) to process - [Approval>Pre-Encumbrance Status](#)

# How to correct a 'Pre-Encumbrance Maintenance Transaction'

Select each requisition that has a Status of **Maintenance Required**

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easyPurchase - eSchoolMall Version user preferences help exit

cart/requisition approval purchase orders receive system settings

summary | view | returned | reports | pre-encumbrance status

### Pre-Encumbrance Status Summary

Select	Requisition Number	Requisition Date	Requisition Name	Ship To Location	Status
<input type="radio"/>	17451	2/8/2013 2:35:01 PM	Nancy Booth, WCHS Youth Service Center	WCBE - Warren Central High School	Maintenance Required
<input type="radio"/>	17452	2/8/2013 2:37:53 PM	Nancy Booth, WCHS Youth Service Center	WCBE - Warren Central High School	Maintenance Required

Select

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easyTouch Navigation™ - For Assistance, please contact Chris McIntyre @270.781.5150, or e-mail to [chris.mcintyre@warren.kyschools.us](mailto:chris.mcintyre@warren.kyschools.us)

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# How to correct a 'Pre-Encumbrance Maintenance Transaction'

To the far right in red it will tell you what the error relates to. In this particular case, the account # is formatted incorrectly and needs to be changed.

Mark the box next to **Undo All** and hit Submit

This opens the PO back up so you can make changes

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cart/requisition approval purchase orders receive system settings

summary | view | returned | reports | pre-encumbrance status

### Pre-Encumbrance Status Detail

Requisition #: 17452  
Requisitioner: 210 User, WCHS  
Requisition Date: 2/8/2013 2:37:53 PM  
Ship To Location: WCBE - Warren Central High School

Retry All:   
Undo All:

Vendor	Item Description	Amt(\$)	Account Number	Fiscal Date	Status
<a href="#">BARREN COUNTY BUSINESS SUPPLY - (KEDC)</a>	Shell Charcoal Desk <a href="#">(more info)</a>	200.00	210210406950221R	02/08/2013	System error selecting account's Org code for line 1, account 210210406950221R System error selecting account, cannot continue.Line 1, account 210210406950221R
<a href="#">BARREN COUNTY BUSINESS SUPPLY - (KEDC)</a>	Mobile Pedestal box, box, file <a href="#">(more info)</a>	150.00	210210406950221R	02/08/2013	System error selecting account, cannot continue.Line 2, account 210210406950221R System error selecting account's Org code for line 2, account 210210406950221R

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# How to correct a 'Pre-Encumbrance Maintenance Transaction'

## Select Return

You may need to hit **exit** under ESM Solutions (top right) to go back to the main menu

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[cart/requisition](#) **approval** [purchase orders](#) [receive](#) [system settings](#)

[summary](#) | [view](#) | [returned](#) | [reports](#) | [pre-encumbrance status](#)

**Pre-Encumbrance Status Detail Requisition 17452 has been removed from the pre-encumbrance staging area. Select the Returned sub-menu option to view the details of the requisition.**

[Return](#)

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Internet | Protected Mode: Off 100%



# How to correct a 'Pre-Encumbrance Maintenance Transaction'

Select Approval>Returned

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Select a Solution from the list to begin.  
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- [Implementation Support](#)

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- [Enhancement Request](#)
- [Customer Support](#)
- [easyPurchase Help](#)

**easyPurchase - you have...**

- 25 Requisition Approval(s) to process - [Approval>Summary](#)
- 1 Pre-Encumbrance Maintenance Transaction(s) to process - [Approval>Pre-Encumbrance Status](#)
- 1 Returned (Approved) Requisition(s) to process - [Approval>Returned](#)

# How to correct a 'Pre-Encumbrance Maintenance Transaction'

Select the Requisition and hit Submit

The screenshot shows the 'easyPurchase - eSchoolMall Version' interface for 'Kathy 001 Phelps for Warren County Schools'. The navigation menu includes 'cart/requisition', 'approval', 'purchase orders', 'receive', and 'system settings'. The 'approval' tab is active. Below the navigation, there are links for 'summary', 'view', 'returned', 'reports', and 'pre-encumbrance status'. The main section is titled 'Modify Returned Request Items' and contains a table with one row of data. A 'Submit' button is located above and below the table.

Select	Request Number	Request Title/Description	Request Justification	Ship To Location	Created
<input type="radio"/>	17452	Nancy Booth, WCHS Youth Service Center		WCBE - Warren Central High School	2/8/2013 2:37:53 PM

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# How to correct a 'Pre-Encumbrance Maintenance Transaction'

You now have the capability to make changes to your purchase order and resubmit.

You may want to go back to your main screen after you resubmit to make sure it didn't come back to you again with an error. You can always go back to the main screen by hitting exit under ESM Solutions (top right)

Kathy 001 Phelps for Warren County Schools esm solutions

easyPurchase - eSchoolMall Version user preferences help exit

[cart/requisition](#) | **approval** | [purchase orders](#) | [receive](#) | [system settings](#)

summary | view | **returned** | reports | pre-encumbrance status

### Modify Returned Request Items

Request Number: 17452      Update All Account #s:

Requestor: 210 User, WCHS      Fiscal Date (mm/dd/yyyy):

Request Name: Nancy Booth, WCHS Youth Service Center      Submitted: 02/08/2013

Request Justification:      Credit Card:

Ship To Location: WCBE - Warren Central High School      Confirming Request: No

Needed by (mm/dd/yyyy):       Apply Price Discount % to All:  (ex. 50.00)

Notes & Attachments:

Return Date	Reason	Product Description	Price (\$)	Override Price (\$)	Qty	Total (\$)	Account #	Remove	Notes & Atts	Deliver To
02/12/2013	<a href="#">Returned from pre-encu...</a>	Shell Charcoal Desk <a href="#">(more info)</a>	200.0000	<input type="text"/>	1	200.00	<input type="text" value="210210406950221R"/>	<input type="checkbox"/>		210 User, WCHS
02/12/2013	<a href="#">Returned from pre-encu...</a>	Mobile Pedestal box, box, file <a href="#">(more info)</a>	150.0000	<input type="text"/>	1	150.00	<input type="text" value="210210406950221R"/>	<input type="checkbox"/>		210 User, WCHS

**Sub Total: \$ 350.00**

Shipping & Handling: \$  OR  %

**Total: \$ 350.00**

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