

Completing the Online Purchase Requisition

Step 1. If you only order for one department against one account, you can save time on future visits by scrolling to the bottom of the screen and placing a check in the box at the bottom of the page (example below). This will save your department information and pre-populate those fields the next time you visit the website from that computer. Pre-populated "header" information can be changed as needed, so if you'd only need to change account numbers each time, you might still benefit from remembering settings.

Remember These Settings (Uses Cookies. Does Not Save Items.)

Update

Process

Clear/Restart

Do NOT click any of the buttons yet.

Step 2. Make sure all fields in the header are filled. See example below. Please note that the Date and Requisition number fields will not have text boxes in which to type; those values will be generated after you click the **Process** button.

DEPT INFORMATION

DATE	Do Not fill	DEPARTMENT	Central Stores			
REQUESTED BY	Jerry Porter				EXT	2427
P.O. (PINK) COPY TO	Jerry Porter				EXT	2427
			MS	SB11	FAX	2434
DELIVER MERCHANDISE TO	Services Building Room 1.102A				RM #	1.10
SIGNATURE APPROVAL	This must be done manually after you process and print this form					

ACCOUNT NO.	SUB CODE	COST SHARING	%	SHIPPING INSTRUCTIONS	SHIP TO
123456	4377	0.00	50	<input checked="" type="checkbox"/> BESTWAY	<input checked="" type="checkbox"/> MAIN CAMPUS
124356	4377	0.00	50	<input type="checkbox"/> DEPT. PICKUP	<input type="checkbox"/> CALLIER CENTER
		0.00			
		0.00			

SUPPLIER INFORMATION

SUGGESTED SUPPLIER	XYZ				
ADDR/CITY/STATE/ZIP	12456 Sherman Strees				
REFERENCE ATTENTION	John Quincy			DELIVERY DATE REQUIRED	08-31-2003
PHONE #	972-555-555	FAX #	972-555-555	F. I. D. #	XXXXXXXX

Step 3. If you have a preferred vendor in mind for your order, furnish their information in the “Supplier Information” section. See the example at the bottom of page 42. If your order is for more than \$2000, Purchasing will need to solicit competitive bids or quotes from additional vendors unless you have a valid reason for needing one particular brand or buying from one specific vendor; in that case, fill out the **Sole Source Justification Form** and attach it with your Purchase Requisition.

If you don’t have a vendor preference, something like “best option available” is a good thing to write in the “Vendor Name” space.

Step 4. Fill in the requested item fields starting with the number of each item, the quantity, description and unit price. See example below. Note that the “Item No.” does not fill in automatically; this lets you use several lines for item description if needed.

ITEM NO.	QTY	UNIT	GIVE COMPLETE ITEM DESCRIPTION	SUB CODE	ESTIMATED COST	
					UNIT COST	EXTENSION
1	2	ea	Intel Pentium 4 3.8ghz computer with 19" flat par		1900	3800.00
2	2	ea	ATI 9800 Video Card		450	900.00
3	2	ea	Sound Blaster Live Audigy Platinum		250	500.00
4	2		Creative MegaWorks 6.1 Speaker System		299	299.00
					TOTAL \$	5,499.00

Step 5. Press the **update** button. Your purchase requisition will automatically fill in the extended cost and total fields. If you realize you need to remove a line item, change the quantity to -1 and press **update** again; the display should revise to show the removal.

Step 6. When all is to your satisfaction, press the **process** button. Print and sign the Requisition, and mail it (AD34) or fax it (x2348) to Procurement Management.