

How to Submit a Purchase Request

A guide for the submission of the purchase request and follow up.

Audience: Departmental supervisors.

Prerequisites

- You are logged in to the system.
- You have permission to create purchase request.

Process

Start a New Form

- Click on the **Forms** dropdown on the navigation bar.
- Select **Purchase Request** to access a new form.

Note: All red fields are required.

Filling Out the Table

- Fill out the default row within the table.
- Click on **Add New Row** at the bottom right of the table to add additional rows.
- Click on the checkmark box within the **Taxable** column for taxable items.
 - o The **Tax Location** percentage is applied to the unit cost of the item.
 - o The **Tax Location** field is defaulted to **Facilities** and can be changed.
- Click on the checkmark box labeled **Shipping Taxable** for taxable shipping.
 - o The **Tax Location** percentage is applied to the shipping cost.

Adding Vendor

- Select a **Vendor** from the dropdown
 - o To filter, type in name of the vendor – the field will fill if there is a single matching result.
 - o The **Vendor Code** will be rendered within the field when a vendor is selected.

Adding a Quote/Attachments

- Click on the **File Upload** button.
 - o Select one or multiple files.

Submitting the form

- Click on **Submit My Request** towards the bottom right of the purchase request.
 - o The purchase request will route to the supervisor for first approval.
 - o Expect email notifications as the purchase request goes through the approval process.