FIN-Purchase Order Requisition

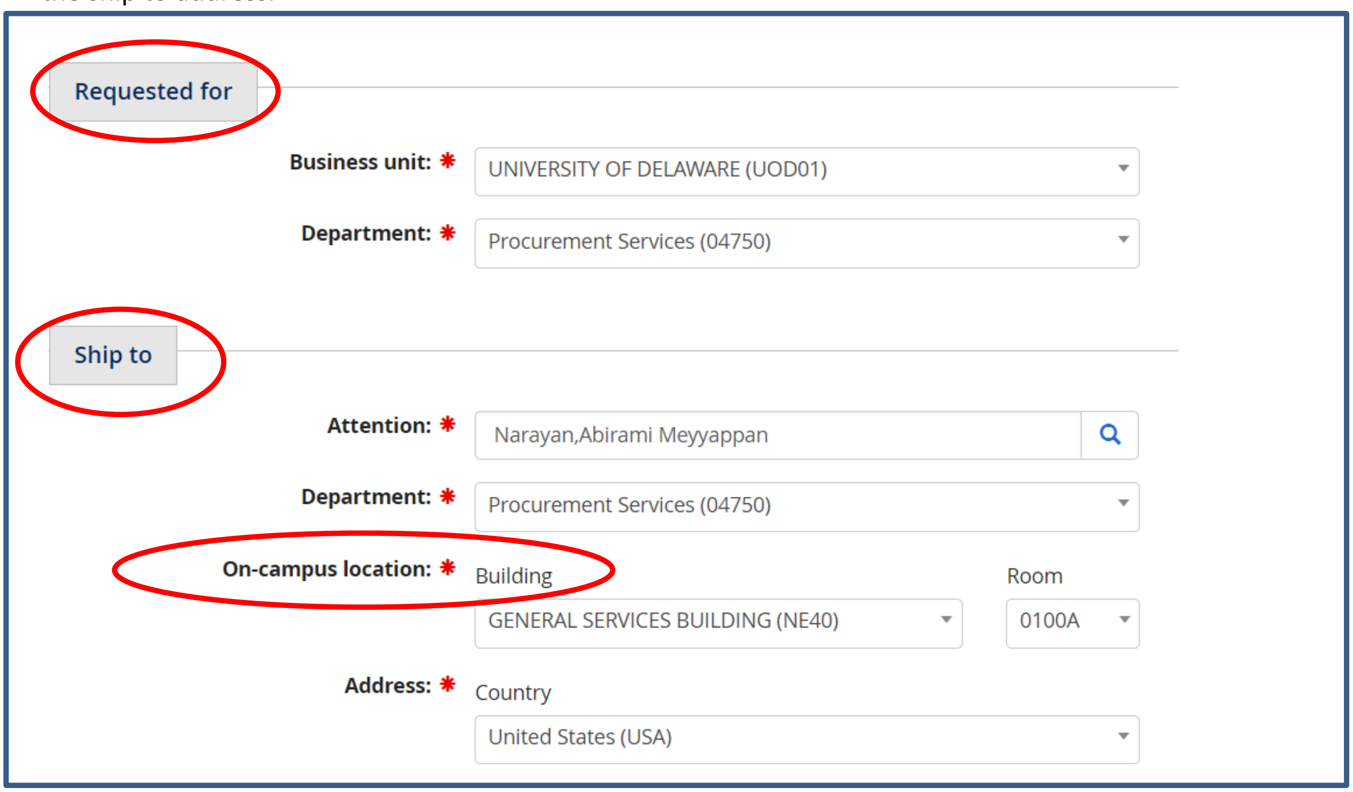
Use this form to initiate the purchase of goods or services from sources outside the University. Goods or Services costing less than $5,000 can be purchased using the UD Purchasing Card. Initiate the purchase on this form if the vendor does not accept credit card payments.

This form can also be used to request payments to vendors for invoices related to purchases made without following the requisition and purchase approval process for amounts greater than $5000. Following the requisition and purchase approval process is highly recommended to avoid any delays in processing payments.

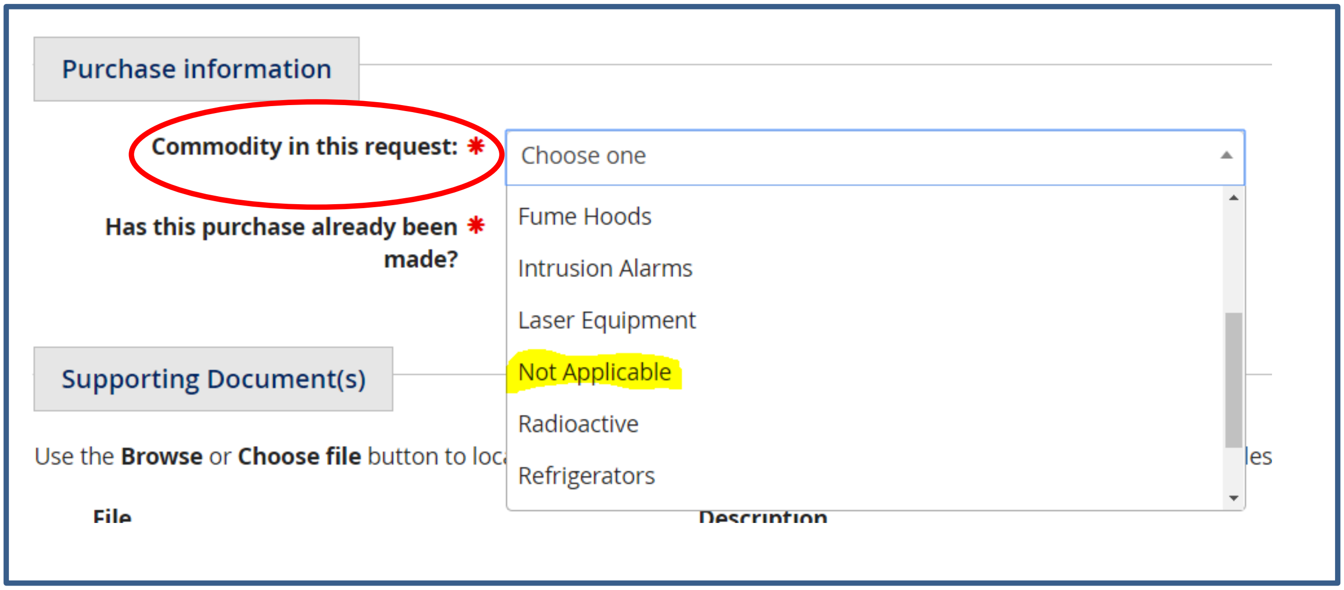
Please click here for instructions on how to fill out the FIN- Purchase Order Requisition web form.

Step 1: UD Web forms log in →Blanks → FIN Purchase Order Requisition (**Scroll down the list to find)**

Step 2: The first page comes with Business unit and department pre populated. There is the Ship to address. It is pre filled with your information. The information can be edited if you are ordering goods that need to be delivered to a different campus building. Choose the building from the drop down list. If you are initiating the request for services and there is nothing that is getting shipped, please do not edit the ship to address.

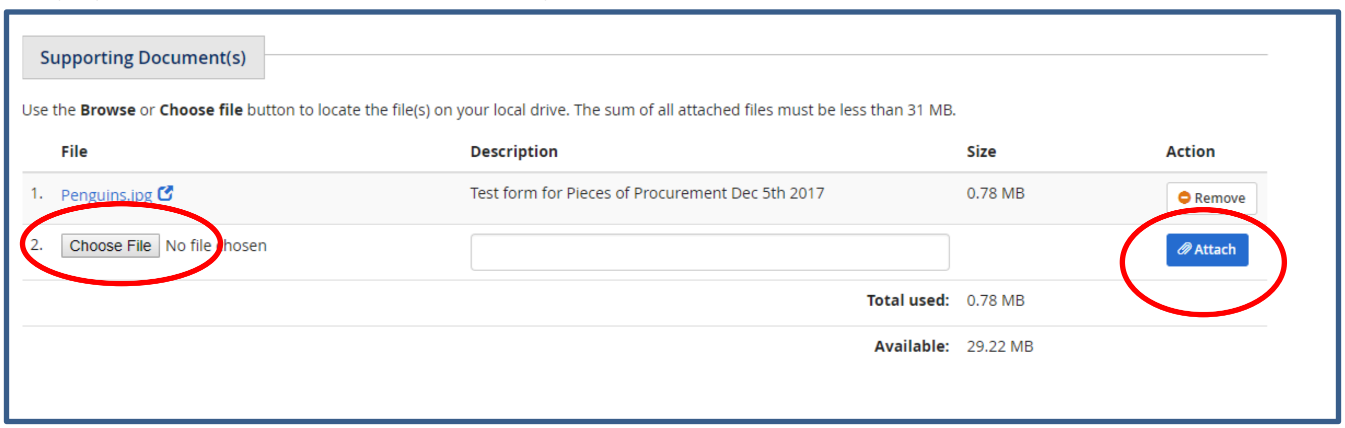


Step 3: Choose the commodity from the drop down list. If your purchase is not for any of the listed commodity, scroll down to find Not Applicable.



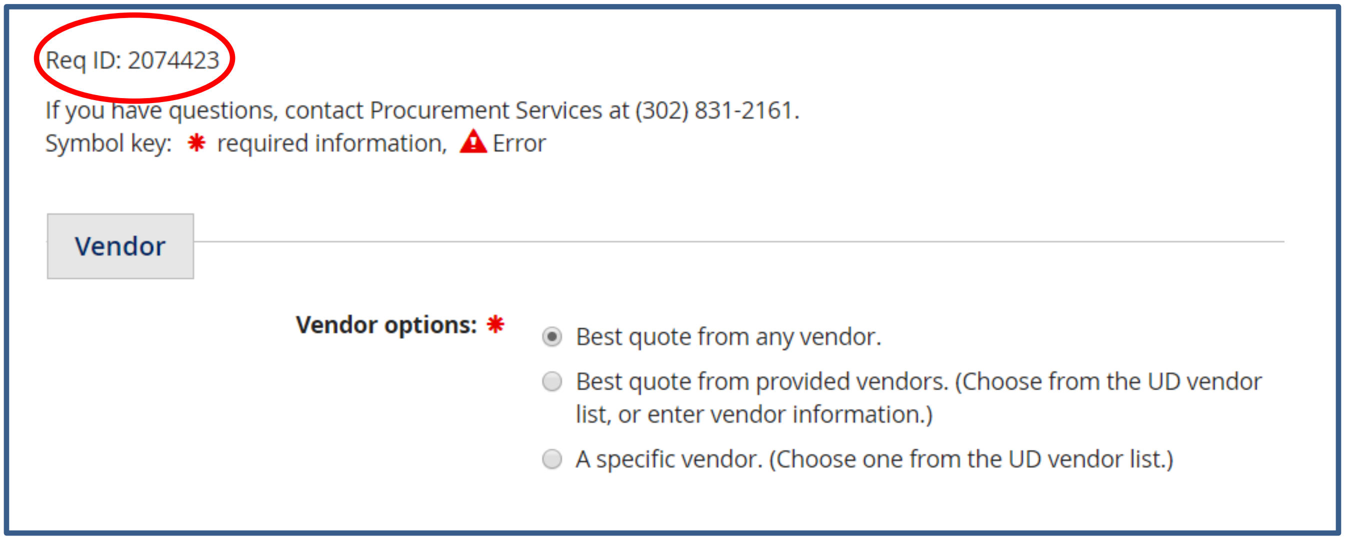
Step 4: Choose an answer for the question 'Has this purchase already been made?' from the drop down.

Step 5: The first page also allows you to attach quotes, documents that would help processing the requisition. The form allows up to twelve attachments. The total file size for all attachments together cannot exceed 30 MB. The form initially shows only one attachment slot. After the first attachment is included, additional attachment slots are available. It is highly recommended to attach any documents you have that maybe related to the requisition to minimize processing time. The attachment now displays the file name. There is also a description field to add brief details about the attachment.



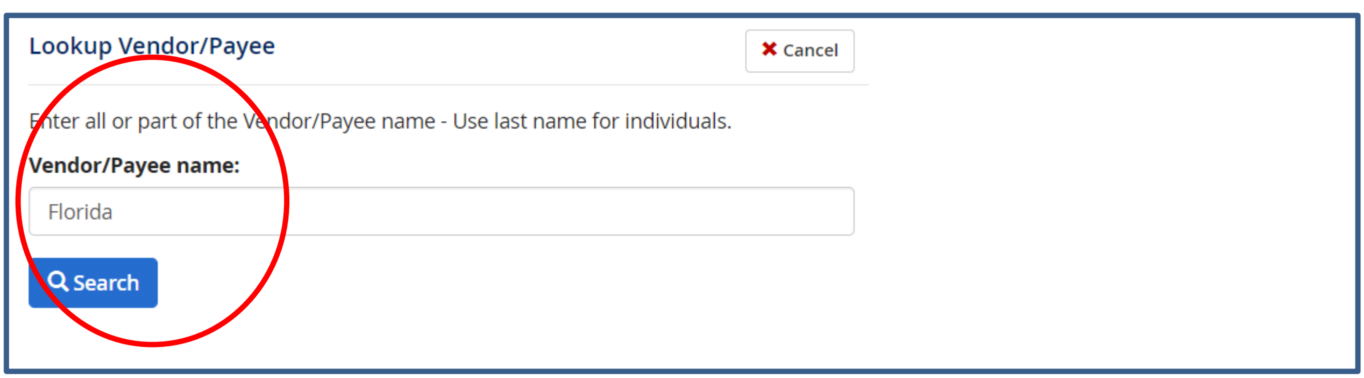
Step 6: Click on Next Step.

Step 7: Select the applicable Vendor Selection from the choices displayed. Notice that the requisition now has an ID number assigned to it.

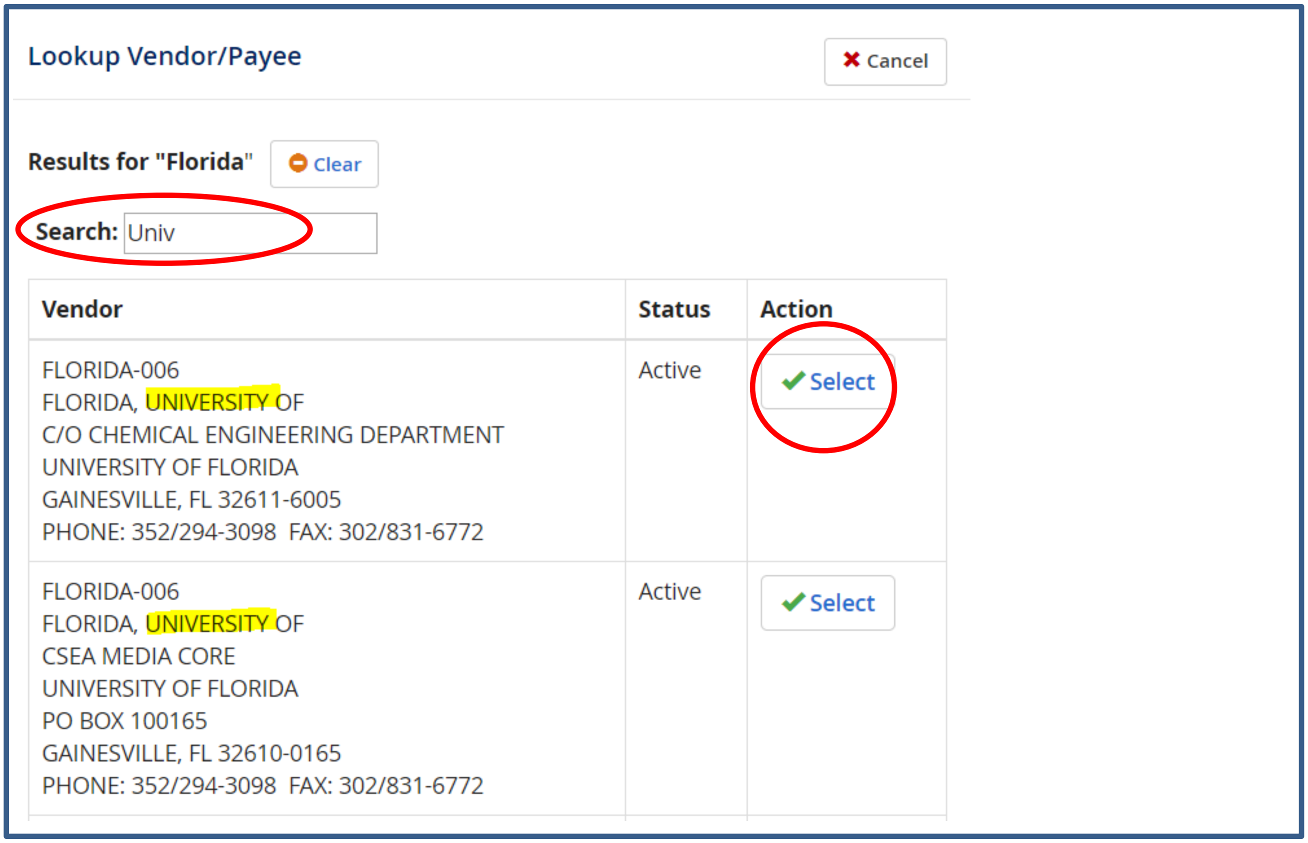


Step 8: Use Lookup Vendor to select vendors. If the choice for vendor specification is Best quote from any vendor, then this step can be skipped.

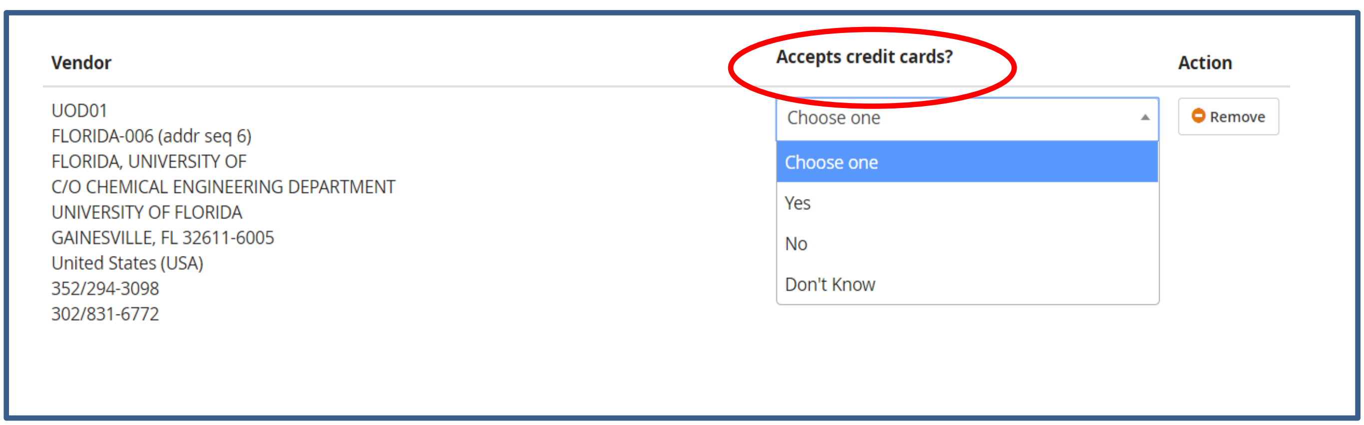
Step 9: The Vendor lookup opens a little pop-up window. Type all or part of vendor name, click Search



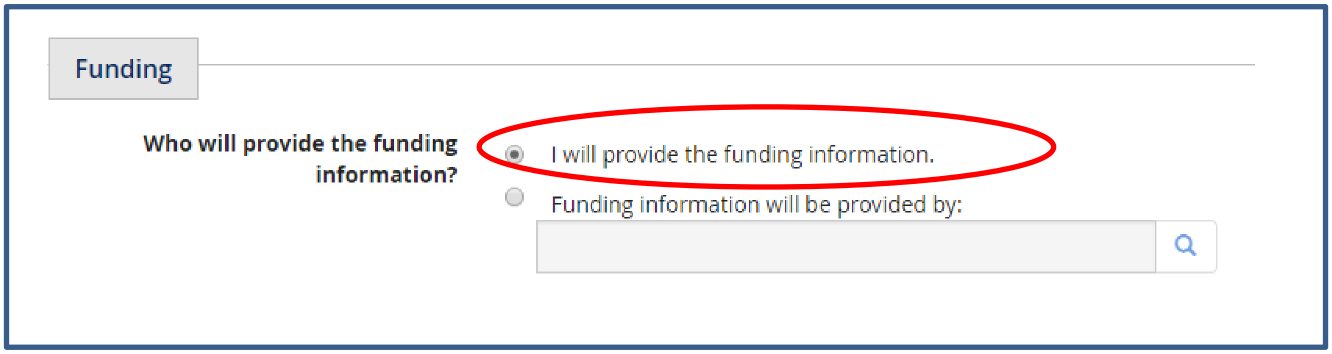
Step 10: The Vendor lookup search returns the applicable results with a Vendor status. Search can be narrowed down by entering keywords in the search box. Click Select to choose the vendor.



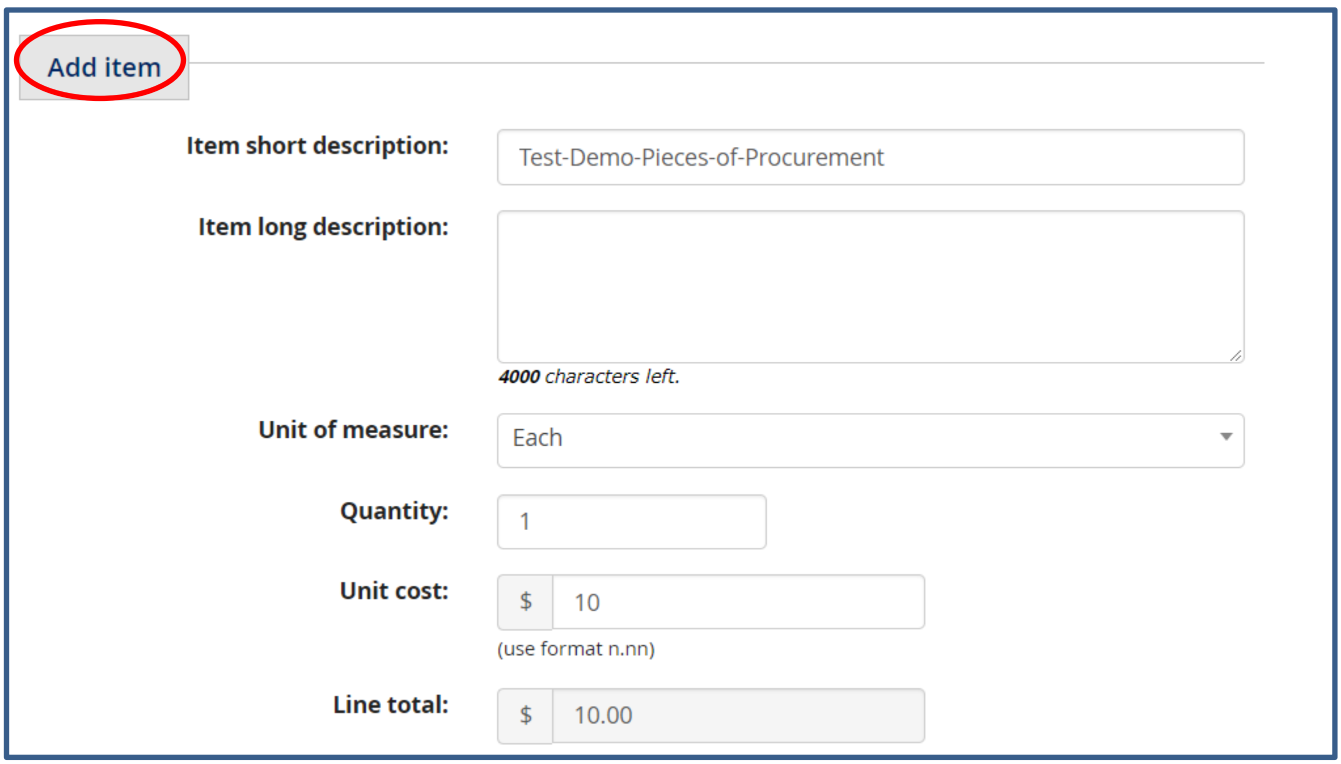
Step 11: The Vendor name is now populated in the form. Choose an answer from the drop down for credit card acceptance by the Vendor. If needed repeat the steps to add more Vendors. Click Next Step.



Step 12: Choose who will provide the funding information.



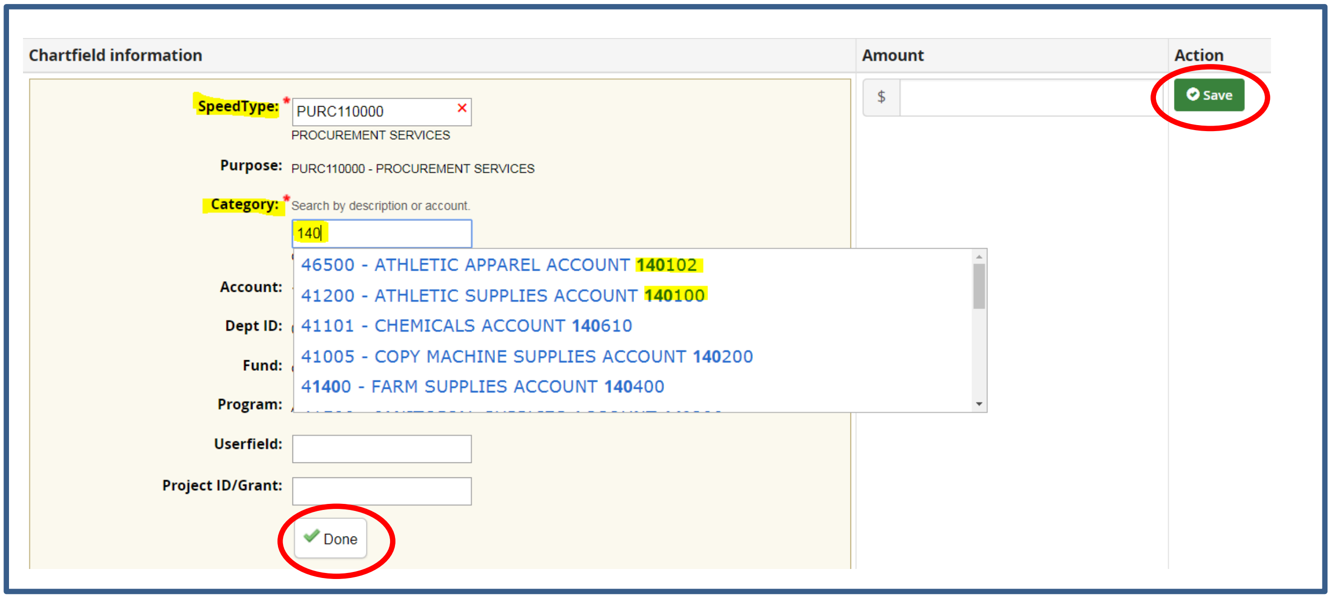
Step 13: Fill in the item short description, unit of measure, quantity and unit cost.



Step 14: Fill in the SpeedType. There can be up to six different speed types for an item.

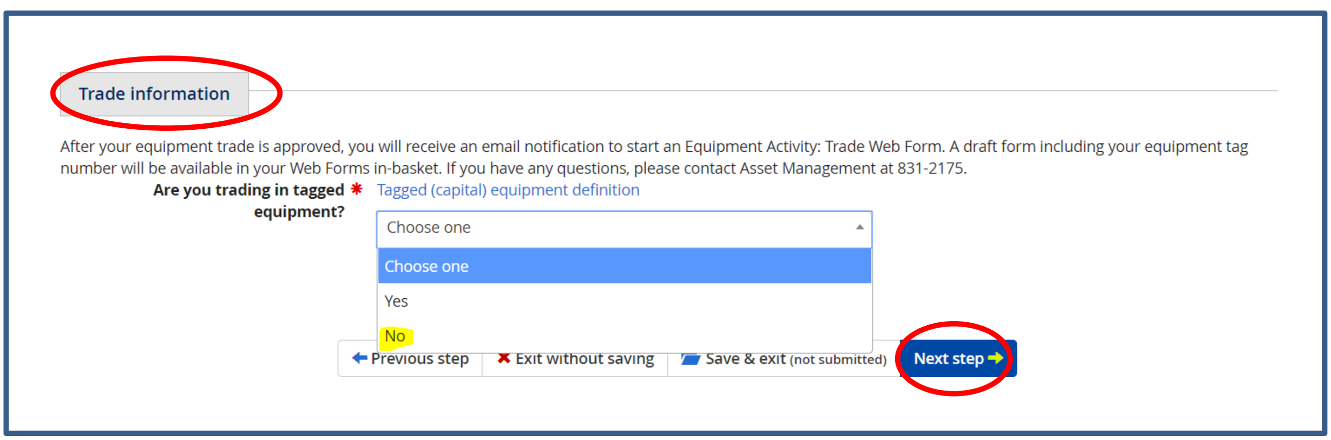
Step 15: Fill in the category code by typing the description or the account code. Only one category / account code per line item. Fill in the amount corresponding to each speed type.

Step 16: Click Save to add more Speed Types. Click done to add another line item.



Step 17: Click Save Item. Repeat the steps to add additional line items if needed. Then click Next Step.

Step 18: Fill out the trade information section. Select 'No' if you are not trading equipment. If you are trading equipment, choose yes from the drop down. The form will prompt for equipment tag information if applicable. Then click Next Step.



Step 19: Enter any additional comments for Approvers or Procurement to pass on to the vendor.

Step 20: Additional approvers are optional, can be added if needed by changing copy to Approve in the drop down. Choose a Purpose Code Administrator from the drop down. Click Finish and Submit.