

This Print & Carry form is used for small-dollar, local purchases of goods or services that are immediately available.

This form limits the purchase to a maximum of \$5000 per transaction.

1. From the Shopping Dashboard, click the Print & Carry PO Request.

2. Select an address from the list provided on the form.



3. The specific location of participating suppliers will be indicated in the Fullfillment Address that is generated:

When shopping at Smith's always go to the Customer Service desk for checkout.

4. In the Purchase Detail section:

- Indicate the items to be purchased in the Product Description field. This may be specific, or generalized with terms like "supplies" or "snacks", etc. Include the business purpose of the purchase.
- 2. In the Estimated Line Amount field, indicate the anticipated dollar amount.
- 3. This form is only valid for purchases totalling less than \$5,000.00.
- 4. This form may not be used to purchase gift cards.







5. On the lower edge of the form, provide:

- 1. The Name, and
- 2. The University ID # of the person who will pick up the order.

A valid ID at the time of pick-up is REQUIRED and should be presented to the supplier.

| nter the name and uNID (e.g. 00123456 or u0123456) of the individual that will be purchasing the goods or services. Valid ID at the time of pick-up is REQUIRED and should be presented to the supplier. | | |
|---|---|------------------------------------|
| ane Doe | 2 | University of Utah ID# u0123456 |

6. Above the Purchase Details section you will find the Available Actions drop down. Select Add and Go to Cart, and click Go.

| Available Actions: Add and go to Cart | ▼ Go llos | e 🔒 |
|---------------------------------------|-----------|-----|
| | | ? |
| Purchase Details | | ? |

7. In the upper right corner of the page, click on Proceed to Checkout.

| roceed to Checkout r Assign Cart |
|----------------------------------|

8. Enter your chartfield information.

| Accounting Dis | tribution | | | | | | Docum | ent Actions | - History | |
|--|---------------------------------------|---------------|----------|----------|------------|---------------------------------|------------|------------------|-------------------|-------|
| Acct Dist Shortcut | BU | Org | Fund | Activity | Project | Account | | A/U | [| edit |
| oo value Required field | no value | no value | no value | no value | no value | no value S Required field | i no val | ue npty field | | |
| ✓ Lines | | | | | | | | Selected | I Line Item Actio | ins 🔻 |
| SMITH'S FOOD 8 | Z DRUG CENTE | RS INC | | | | | | | | |
| EE CUSTOMER SRVC . 55 S 500 E, SALT LAK | | IS | | | | | | | | |
| Product Desc | ription | | | Cata | alog No Si | ze / Packaging | Unit Price | Quantity | Ext. Price | |
| Supplies for o | ffice break room. | 🗐 🧔 more info | | | | | | | | |
| | d Purchase Amou ibution (same as h | | | | | | 100.00 | 1 | 100.00 USD | |

9. Click Submit Requisition.

| | Submit Requisition) | | | | | | Submit Requisition 4 | 4 ssign Cart | |
|--------------------|----------------------|-----|------|----------|---------|---------|-------------------------|--------------|--|
| Accounting Dist | ribution | | | | | | Document Actions 👻 Hist | ory 🗎 | |
| Acct Dist Shortcut | BU | Org | Fund | Activity | Project | Account | A/U | edit | |

10. View the requisition approval status.



- 11. Click on PR Approvals until you see that your requisition has completed workow. Get AE approval as necessary.
 - 1. Click on PR Approvals to refresh the status. Have the Account Executive approve as necessary.
 - 2. Look for the Completed status.
 - 3. Click on View Related Documents.

| Requisition: 78804312 2016-09-07 COSTCO - | PR Approv | vals | | | | Document Actions 👻 | History 🚔 ? |
|--|--|------------------------------|-----------------------------------|---|------------------------------|--------------------------|----------------------------------|
| Status Completed Description Table KPD View Related Documents Requisition > | Submitted MICHELE THOMAS 9/ 2: | CF Validation Completed ✓ | Department Approval Approved 🗸 | UShop Central Approval Approved 🗸 🗸 JEFFREY JOHNSON | Final CF Validation | Create PO Completed ✓ | Completed 9/8/2016 8:47 AM |
| Comments | | CF Validation Response | | | Final CF Validation Response | | |
| PR Approvals | | Approved 🗸 | | | Approved 🗸 | | |

12. Click View to see your Purchase Order



13. Click Document Actions and Print Fax Version.



14. Print your purchase order and take it to the supplier, such as Smith's in this example.

Note that in addition to the Product Description and Estimated Purchase Amount, the person who will pick up the order is identified on the PO by name and University of Utah ID #. The person must bring a valid University of Utah ID card and this Purchase Order to the supplier's location.

| THE | | | | University of Utah | | | |
|---|--|---|---|--------------------------------------|------------|--------------|------------|
| UN | IVERSITY | Purcha | se Order Date | PO/Reference No. | | Revision No. | |
| OF | IVERSITY Utah® | Oct | 5, 2018 | U000152840 | | 0 | |
| | 01/11 | For general guestions concerning th | nis purchase order, please contact the University of Utah Pu | rchasing Department as shown herein. | | | |
| Buyer: | | | urchase order items or delivery, please contact: | | | | |
| UNIVERSITY OF UTAH | | | Name | Email | | Phone | |
| (An Equal Opportunity Employe | n | WEND | Y ASTLE SPEERS | wendy.speers@utah.edu | | +1 801-587-1 | 710 |
| PURCHASING DEPARTMENT | | Order Confirmation/Purchase Reco | | | | | |
| 201 Presidents Circle Rm 170 | - | | order by supplying cost and date of shipment to the user li | sted above. | | | |
| Salt Lake City UT 84112-9049 U Tel: (801) 581-7241 | 54 | Authorized Signature Director of Purchasing: Glendon Mit | hele all | | | | |
| Fax: (801) 581-8609 | | Director of Parchasing: Glendon Mit | (chei | | | | |
| Federal Tax ID: 87-6000525 | | | | | | | |
| State of Utah Sales Tax Exemption | | | | | | | |
| Utah Charitable Tax Exemption: | N21318 | | | | | | |
| | | L | | | | | |
| Order acceptance instructions | | | | | | | |
| | erms & Conditions of Purchase may be viewed at the following link: http://fbs. | admin utah edu/nurchasi | ng/supplier/no_terms | | | | |
| onversity of orall f | erns a contractors of rurenase may be viewed at the ronowing mixin http://iss | rannina canceda, parenasi | ing/supplier/po_terms | | | | |
| | Vendor Information | | | Delivery Info | rmation | | |
| Seller: | | | Delivery Address | | | | |
| Vendor Name | SMITH'S FOOD & DRUG CENTERS INC | | ATTN: | WENDY ASTLE | SPEERS | | |
| Address | 455 S 500 E SALT LAKE CITY, UT 84102 US | | COLLEGE OF EDUCATION DEANS OFFICE 1721 CAMPUS CENTER DRIVE RM 1226 | | | | |
| F.O.B. | | | SALT LAKE CITY, UT 84112 | | | | |
| Requested Delivery Date | | | United States | | | | |
| Quote number | | | ShipTo Address Code | 0071012260 | | | |
| | Invoice Instructions | | | Billing Ad | dress | | |
| 1. Email or fax invoices to Univ | ersity of Utah Accounts Payable at: a. Email: ap@admin.utah.edu b. Fax: 801-585-6443 2. Include PO Number on all shipments, i | nvoices, and other correspondence, 3. | ACCOUNTS PAYABLE | - | | | |
| Invoice must state whether Sel | ler is incorporated, and must contain Seller's Federal Tax ID number. 4. Bills of Lading must accompany the invoices of all freigh | | 201 PRESIDENTS CIR | | | | |
| payment information, call Acco | unts Payable at 801-581-6976. | | RM 145 | | | | |
| | | | SALT LAKE CITY, UT 84112-9003 United States | | | | |
| | | | United states | | | | |
| Line No. | Product Description | | Catalog No. | Size / Packaging | Unit Price | Quantity | Ext. Price |
| 1 of 1 | Food for MAA meetings in Oct and Nov 2018 over 15 students will attend the meeting - Estimated Purchase Amount | | | | 50.00 USD | 1 EA | 50.00 USD |
| | ADDITIONAL INFO | | | | | | |
| | Name (First & Last) | Yair Marin | | | | | |
| | University of Utah ID# | 00956185 | | | | | |
| | Estimated Purchase Amount | 50.00 | | | | | |
| | | | 1 | | | | |
| | | | | | | | |

15. The supplier will send an invoice to Accounts Payable. You attach your store receipt to the PO, if desired for additional documentation.

The invoice will be scanned and made available through management reports and the *Invoice Lookup (OnBase)* link in the Quick Links section of the Dashboard.



Frequently Asked Questions

Q: Do I need to know ahead of time exactly what I'm buying and how much each item costs?

A: No. Simply provide a general description of the item(s) you plan to buy, along with an estimated dollar limit. You are essentially providing a limit or a "not to exceed" amount. The account executive or GFA Approver approves the purchase up to the amount listed on the requisition. Simply approve enough to purchase all that is required. Wait for the invoice to be paid and then close the PO in the Management Report. This will relieve any excess encumbrance.

Q: Will the supplier provide me with an invoice at the time of sale, or will they send an invoice later to AP?

A: The supplier will send the invoice directly to Accounts Payable. Keep the receipt for your own records and to validate the invoice.

Q: Can I go to any location for the listed suppliers?

A: No. Only the locations listed on the form have confirmed that they accept Print & Carry POs (See #3).

Note: If you need to go to a different location, please contact the supplier in advance to confirm that they will accept your Print & Carry PO.