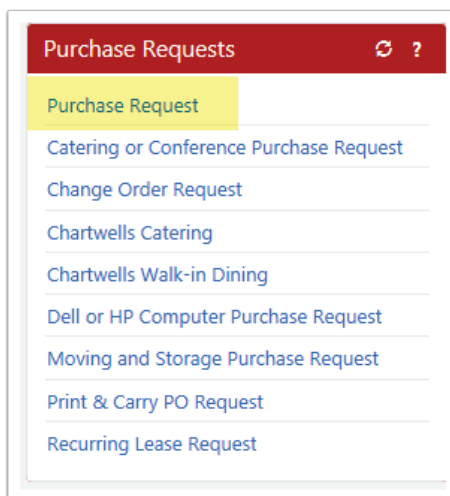- **Each UShop transaction generates a Purchase Order** (PO), whether the cart is filled through a punch-out catalog or by using a form.

- Use the Purchase Request form to to generate a PO to purchase goods and services from a supplier:

     - That does not have a punch-out or hosted catalog,
     - Is not an Internal campus supplier, and
     - Does not have a specialized form.

- Use this form for both one-time purchases, and for contract-based purchases that will span a period of time.

- Use the *Contract Details*, see details in section D, when the request is either to:

     - Result in multiple contract-based purchases over a period of time, or
     - Update current contract(s), or
     - Establish new contract(s), or
     - Purchase of items for resale to the public.

- Accounting distributions (chartfields) and product description line items must be accurate for all purchases so payments can be properly applied. See details in section F.

A. Locate the Form

The Purchase Request form is found in the Purchase Request section. It is located at the head of the list for easy access, whereas the other forms are listed in alphabetical order.

Purchase Requests
Purchase Request
Catering or Conference Purchase Request
Change Order Request
Chartwells Catering
Chartwells Walk-in Dining
Dell or HP Computer Purchase Request
Moving and Storage Purchase Request
Print & Carry PO Request
Recurring Lease Request

B. Generate a PO for a One-Time Purchase

1. Enter the name of the supplier. If the supplier is already enabled in UShop, the name will auto populate. You may select it and move forward to the next section.

2. If the supplier is not yet enabled, you will receive the message,"*Try searching again*". If this occurs, type the words "New Supplier" in the *Enter Supplier* field, and

3. Provide the information requested in *New Supplier Details*.

4. Please note that some suppliers choose not to accept a PO for order placement and/or payment method. Before requesting a New Supplier be added to UShop, please confirm whether they will accept a PO for order placement and/or payment method.

Supplier Information

Type in the name of the supplier in the **Enter Supplier** field.

Enter Supplier ①

or
Supplier Search

If your supplier is not available: ②
- Type "New Supplier" in the **Enter Supplier** field.
- Then enter the supplier and any contact information you may have in the **New Supplier Details** section below.

You may search for existing PeopleSoft vendors using the Vendor Search web app available in CIS.

NOTE: Please verify the supplier will accept a PO. ④

New Supplier Details

New Supplier Details (If needed)

Provide supplier name and email address for the UShop Team to reach out to your Supplier.

Supplier Name ③

Supplier Email Address

Suppplier Phone Number

Supplier Address

255 characters remaining   expand | clear

---

5. Purchasing Details. Provide the *Product Description*, *Quantity*, and *Estimated Line Unit Price* (dollar amount) of your purchase. *Catalog No.* and *Packaging values* are optional.

Purchase Details

Product Description ⑤

254 characters remaining   expand | clear

Quantity

Estimated Line Unit Price

Catalog No.

Packaging (UOM)   EA - Each

- **Note**: to create multiple Product Description lines, find the Available Actions dropdown in the upper right corner of the form. Select *Add to Cart and Return*, and click *Go*. This will deposit the first Product Description in the cart, and return to the form. The supplier name is retained, but all other sections are cleared and ready to be completed for the next PO Product Description line.

- When all desired lines are added, select *Add and go to Cart*.
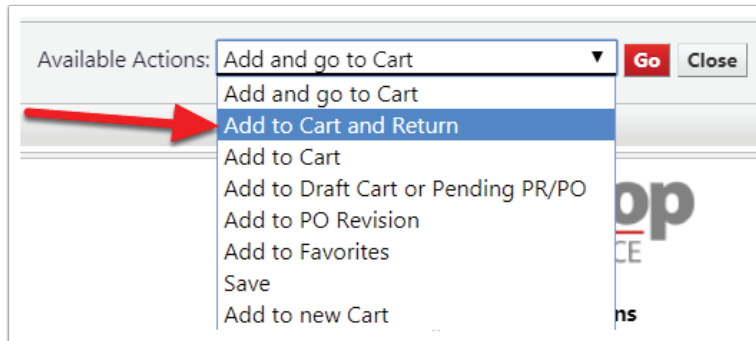
6. Product Health and Safety Details. Indicate whether any of the item(s) on the order are controlled substances, hazardous or redioactive, and check the applicable boxes. (You are also encouraged to indicate the sustainability of items in the order by indicating Recycled, Energy Star, or Green.)

7. When entering the University Campus, Radioisotopes MUST be delivered to Stores & Receiving, not to an individual department location. When the cart has been filled, Proceed to Checkout and select *Stores and Receiveing* as the Shipping Address. Include your name, building and room number in the *Attn To* field so the order can be delivered correctly.

8. Purchasing Department Details. Complete this section only if the order exceeds $5000 or requires assistance from the Purchasing Depatrtment.

- Orders that exceed $5000 will route automatically to Purchasing. However, the *Yes* button may be checked to require this requisition/order order to go to Purchasing regardless of dollar amount.

- Be sure to have an empty cart before beginning this transaction, as requests for a bid or sole source approval should not be combined with any other order in a cart.

- Bid Specifications and Sole Source Approval requests should be attached as Internal Attachments.

- A comment to the Purchasing Department may be made here, but is more visible if made in the Comments section on the Checkout page.

9. Attachment Details. Attachements may be added here on the form, or on the checkout page. All attachments can be viewed on the checkout page in *Attachment Overview*.

- Internal Attachments can be seen only by UShop users.

- External Attachments can be seen by UShop users, but will also be sent with the PO to the Supplier.

C. Add Multiple Product Description lines, if needed

If more that one item is included on this order, such as multiple items or shipping fees, you may add each item as a separate Product Description line. To do this, complete the form for the first item per the steps above.

Go to the upper right corner of the form and open the *Available Actions* dropdown menu.

Select *Add to Cart and Return*, and click *Go*.
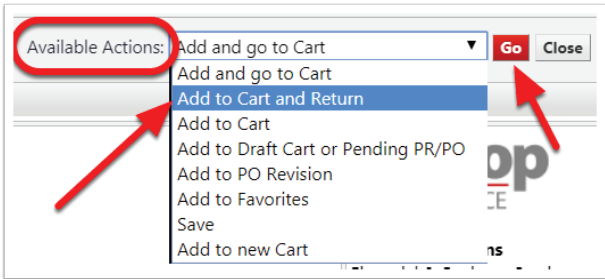
This will deposit the first *Product Description* into the shopping cart and return to the form so additional items may be added to this order.

D. Generate a PO that is based on a Contract, or for items for resale

In addition to following the steps in sections B and C, above, complete the *Contract Details* section. Note that the questions in this section are not required, but please provide as much information as is available to give the Purchasing Buyer a clear understanding of your order.

1. Indicate whether there is an existing contract associated with this order.

2. To initiate a bid or RFP, provide bid spcifications.

3. Provide information about an existing PO or contract, if known.

4. Indicate whether the order includes items for resale to the public.

E. Complete Transaction

Add and go to Cart. When all needed items are included in the cart, find the *Available Actions* dropdown menu in the upper right corner of the form. Select *Add and go the Cart*, click *Go*.

Note: clicking *Go* will save the information on the form. Closing the form without going to the cart will result in the loss of the information on the form.
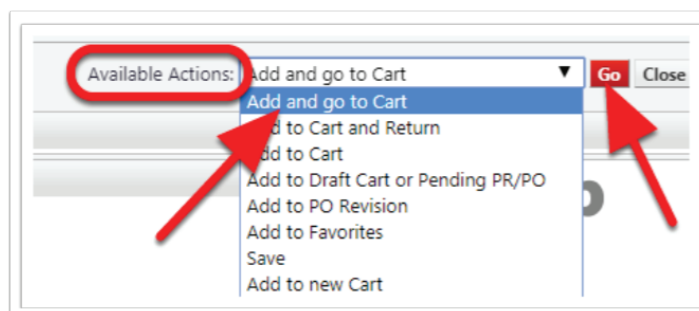
This will take you to the UShop Shopping Cart, where you will:

1. Name the cart to reflect the contents of the order, and

2. Click *Proceed to Checkout* and complete as with any UShop order

F. Accounting Distribution Set Up

• A PO not only places an order for goods and services, it also encumbers funds to allow invoices to be paid. **In order for expenses to be posted to the correct funding source, the correct Accounting Distributions need to be indicated on the PO.**

• The Accounting Distribution on a PO should be set up appropriately from the start. It should not be considered a "Default Fund" from which individual charges may be reallocated.

Choose the appropriate Accounting Distribution option method(s):

1. **Single Accounting Distribution:** add at the header to apply to entire PO

2. **Multiple Accounting Distributions:** add at the header to apply to entire PO

3. **Multiple Product Description Lines requiring unique Accounting Distributions:** edit at the Product Description line level to authorize payment from a speciifc payment source

1. Single Accounting Distribution: add at the header to apply to entire PO

A funding source, added at the main (or "header") Accounting Distribution will apply to the entire PO (unless the Accounting Distribution is edited at the line level). Note the message displayed at each of the Product Description lines on this order: *Accounting Distribution* (same as header).

2. Multiple Accounting Distributions: add at the header to apply to entire PO

If a split Accounting Distribution should be applied to the entire PO, it is still appropriate to add this split at the header.

3. Multiple Product Description Lines requiring unique Accounting Distributions: edit at the Product Description line level

Assign the correct Accounting Distribution(s) to each Product Description line.

Click *edit* on the appropriate Product Description line.

After editing the Accounting Distribution at the Product Description line:

1. The new Accounting Distribution will be displayed at the line level, and

2. Two new messages will appear:

   At the header: *Accounting Distributions vary by line.*

   At the Product Description line: *values have been overridden for this line;*

   While the un-edited Product Description line retains the message: *Accounting Distribution (same as header).*

If you would like help determining how to correctly assign Accounting Distribution(s) to each Product Description line, please contact the UShop Help Desk at 5-2255.