UMeNET Purchasing: Standing Order

Standing orders are issued for recurring services only. General goods and services should be ordered through individual Purchase Orders.

2. From the Purchasing tab, click Create, then Purchase Requisition.
3. Complete the following fields.
   a. Title: (ex Quest Diagnostic FY2014 Standing Order)
   b. Place Order on Behalf of: (your name)
   c. Shipping Address: (To search click the drop down and choose Search for More.)
   d. Delivery Contact: (Type the name and phone number of the delivery contact.)
   e. Default Account: (Type the UM departmental account number. Ex: 1XXXX)
   f. Sub Object Code: (Ex: 3811)
   g. Phone in Order: If left unchecked, the PO will automatically route to the vendor. End-users who prefer to call the vendor directly, can check this box.

4. Click the Add Non-Catalog Item button.
5. Complete all fields as follows.
   a. Supplier Part Number: (Leave this field blank)
   b. Full Description: (ex: “Blood test services for 6/1/13 - 5/31/14.”)
   c. Commodity Code: (Ex: Medical Laboratories)
   d. Supplier: (Ex: Quest Diagnostics)
   e. Quantity: (Ex: 1)

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f. Price: (Ex: $1000)
g. Unit of Measure: Lot (This must be set as Lot to pay multiple invoices.)
h. Click Ok to add the item to the cart.

6. Attach the agreement or proposal if available.

7. Click the Approval Flow tab and check that Purchasing is in the approval flow.
   If not, Add the corresponding approver.
   Medical Campus: Maita Beguiristain
   Gables / RSMAS Campus: Aymara Lopez

8. Review the information.

9. The requisition will encumber at the point it gets submitted. Click Exit, then Save if the standing order is for a future fiscal year. Make a note in your Outlook calendar to submit the requisition on the first workday in June.

10. Should the vendor send invoices to the department, write the PO number at the top of the invoice and forward to Accounts Payable for processing.

CHECKLIST

- Change the unit of measure to “LOT.” This allows for multiple invoices.
- Attach the agreement or proposal if available.
- Add Purchasing to the Approval Flow if they are not already listed.
- Submit the requisition only if it is for the current fiscal year.

Questions?
Contact the UMeNET help desk at 305-284-4989.

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