Creating a Requisition for a Standing Purchase Order

FY 19 (6/1/18 – 5/31/2019)

Video Tutorial [http://recordit.co/8inxxiHRka](http://recordit.co/8inxxiHRka)

1. Click **Purchases**.
2. Click **Request Non-Catalog Items**.
3. Click **Request Services**. ***All standing Purchase Orders need to be marked as services. “Services” is crucial to making sure the PO remains open for more than one payment.***
4. **Description:** “FY19 Standing Purchase Order for oxygen tanks as needed 06/01/18 – 05/31/2019.”
5. **Spend Category:** (ex SC08234 – Gas Cylinders)
6. **Supplier:** (ex Airgas USA LLC)
7. **Start Date:** 6/1/18
8. **End Date:** 5/31/19
9. **Extended Amount:** (estimated total PO Amount for FY19) $3000.
10. **Memo:** (optional, ex “Specialty Mix Cylinders for Dr. Morales”)
11. Click **Add to Cart**.
12. Click **OK**.
13. Click the orange shopping cart (upper right corner).
14. If items appear in the cart that are not needed on this requisition, select the line and click the trash icon on the right side of the screen.
15. Click **Check Out**.
16. Update the **Default Shipping Address**. (ex remove the incorrect address and replace with “1320 400.” Select address 1320 S. Dixie Hwy Suite 400.)
17. Click the box for **Apply Ship-To Address Changes to All Lines**.
18. Click **Next**.
19. On the **Information** tab, find the **Requisition Type** field and select **Standing Order**.
20. Click **Next**.
21. Attach supporting documentation such as:
   - Past invoices showing minimum and maximum monthly charges
   - Contract
   - Agreement
   - Quote
   - Price List
22. Click **Next**.
23. On the **Review and Submit** tab, scroll down to the **Service Line** section. **Warning, if line appears as Goods, delete the goods line. Only service lines can exist on a standing PO. Service lines can pay more than one invoice. Goods orders will auto-close after only one payment.**
24. Find and update the **Spend Category** field.
25. Update the Program, Grant, Gift or Project. Program Managers and Cost Center Managers can provide this number.
26. If today’s date is **May 31, 2018 or before**, click **Save for Later**. Then Submit on or after June 1, 2018.
27. If today’s date is **June 1, 2018 or later**, click **Submit**.