Creating a Requisition for a Standing Purchase Order
FY 20 (6/1/2019 – 5/31/2020)

Video Tutorial 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 06/01/19 – 05/31/2020.”
5. Spend Category: (ex SC08234 – Gas Cylinders)
6. Supplier: (ex Airgas USA LLC)
7. Start Date: 6/1/19
8. End Date: 5/31/20
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 doesn’t take place in the same fiscal year as the purchase order, click Save for Later. Then Submit on or after June 1.
27. If today’s date is June 1 or later, click Submit.