

How Purchasing via a Requisition Works

- 1- Contact the vendor and get a quote for the items you need to purchase
- 2- Assuming you have access to Panthersoft Financials, create a requisition online
- 3- If the vendor is not in FIU's list of vendors, fax or email the vendor the proper forms (<http://finance.fiu.edu/purchasing/forms.html>). Fax the completed forms to Purchasing for entry
- 4- After Purchasing contacts the vendor, they create a purchase order number (PO). You can check in Panthersoft requisition document status to see if your requisition has a PO. Vendors often ask for this number while waiting for payment
- 5- After you receive the items, make sure you create a receipt online in Panthersoft
- 6- Contact the vendor to get an invoice for the items, and fax it to Accounts Payable (A/P) at 7-1774 (many times the vendor will automatically send the invoice directly to A/P, but it's up to you to make sure A/P gets it). Jot down the PO and receipt number directly on the invoice before you fax it
- 7- Keep checking the PO document status to make sure the vendor receives payment

Notes:

- The process is similar for blanket PO's (a fixed pot of funds set aside to continuously purchase items, usually with an expiration date) except that you create a receipt only for what you receive at that particular moment. You keep creating receipts until the blanket funds end
- Make sure you label OCO (items with a unit price of \$1000 or more) and Subcontract items correctly to avoid delays
- Make sure to attach a quote or subcontract to your requisition
- Make sure to put header comments in your requisition, especially your contact information
- A/P pays invoices by vendor letter. Right now they don't have an updated list of A/P reps and their letters. However, note what I know below (for the moment):
 - Marichu Urbieto – letter F - 7-3626
 - Zerelda Rodriguez – letters U and S - 7-2565
 - Carlos Valle – letter I - 7-2131
- If you need help with this process, please contact Helen Forlong at 7-1319 or Carola Martinez at 7-2202