Placing an Order

When placing an order, you must review shop catalogs and/or search for the vendor to see if they are in Kuali. Details on how to search for a vendor before creating a requisition are on the next page. You then complete an order via shop catalogs or you create a requisition.

You may email the fiscal officer to add a vendor to Kuali if you will be purchasing items from the vendor often, or if the item is over $3k ($3k is the pcard limit).

Only after you have followed these steps and the amount is less than $3k may you use your pcard for a purchase.

Shop Catalog Orders

- You place an order via shop catalogs and then submit the cart to Kuali.
- Add the accounting info.
- Enter the relevant justification in the notes sections. For Air Gas orders, you must include the Air Gas Account #, the lab #, & a phone # (see Kuali quick guide).

Requisitions

- You create a requisition, enter the delivery info, the vendor, and the accounting lines in the appropriate fields.
- Enter the relevant justification in the notes section.
- You must upload a quote in the notes section. This may range from an extensive quote from the company for large purchases or special equipment to a screenshot form the vendor's website.

Other Important Notes

- If the vendor **sends you the invoice, forward this immediately** to the fiscal officer. Vendors do not get paid until Accounts Payable (AP) receives the invoice. Fiscal officer will get the invoice to the correct staff member in AP.
- If you: 1) never receive the order, 2) the vendor emails you to say they can't fill the order and thus cancel the order, or 3) if you cancel the order with the vendor, you must email the fiscal officer to void the PO.
- If your order is over $5k, a **line item receiving** document in Kuali is required. Vendor will not be paid until that document is complete. Please email the fiscal officer for help.

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Vendor

1. Click on Vendor in the Kuali Menu.
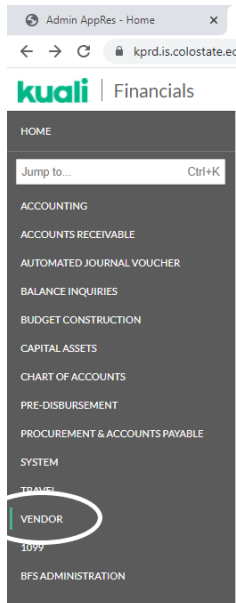
2. Search for the vendor's name. Use the wildcards * before and/or after, to find the vendor name. Kuali is sensitive to caps and spaces. For example, MTI Corporation is in Kuali as M T I Corporation. For them to show up, you must put in the spaces.

Pcard Info

- Pcards may only be used when Kuali is not a viable option.
- It is your responsibility as a pcard holder to turn in the receipt ASAP. You can email a receipt if you receive it electronically; but, if you receive a physical copy, the department will need the physical receipt. If you email the receipt, please provide the account # and either attach the justification forms or include in the body of the email.
- Email: physics_pcard_receipt@Mail.ColoState.EDU

Required Forms for Pcards

- If the pcard purchase is on a 13, 16 or 64 account, provide the itemized receipt and "why" you purchased the item as the justification.
- If the pcard purchase is on a 53/88 account, provide the itemized receipt and the justification form for 53 and 88 accounts.
- If the pcard purchase involves food, provide the itemized receipt and an official function form.