

Requisition with a Contract indicating Travel card as a payment method

Contracts that have procurement elements needing to be reviewed and the requested payment method is with a Travel card can be created in ePro using this form request.

This process is to assist with the approval process and will not create a purchase order.

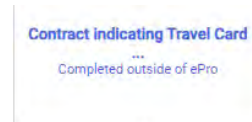
The Travel Card holder must not proceed with the purchase until the Summary section indicates “Completed” inside a green bar and a Procurement buyer has entered a comment that the Travel Card holder can proceed. A completed “Contract indicating Travel card as Payment Method” requisition is indication that the card holder should contact the Supplier directly to process the order and payment.

Please add a COMMENT indicating the date & time the order was placed.

Additionally adding a COMMENT once the product / service is received / completed is useful. This will help various end users track the request through the cycle to completion.

At Dashboard

Locate Other Forms area



Select sticker – Contract indicating Travel card as Payment Method

Instructions tab

Read

Next

Details tab

Change Form Name field to Supplier’s name

Form Name *

Save Progress

Next

Supplier tab

Under Action option – click on SELECT

Supplier Name	Doing Business As	Fulfillment Centers	Additional Supplier Distribution Data	Action
Requisition with Contract indicating Travel Card as a payment method			system.will.not.distribute.to.supplier@coastal.edu	<input type="button" value="Select"/>

Next

Attachments tab

Add separate attachments as needed

Example: Contract
 Routing Form + Quote + other supporting documentation
 COI

Save Progress

Next

Forms Field tab

Enter Supplier's name, Contact, Email Address, and Unit Price Total (tax included)

Explain nature of requisition – this information appears as the Product Description line within the cart

Save

Next

Review and Submit

Select "Add to new Cart"

Within the Cart screen

Select Proceed to Checkout


In the Cart Summary screen, key in any remaining supporting information - similar to information entered on a Punchout or Non-Catalog Item order

Updates to the "Explain nature of requisition" (which shows as the product description line) can be access via the Supplier's name

Once all updates are complete

Save Progress

Click on Back to Requisition



< Back to Requisition

Do not enter in Travel card information at this time

Depending on your role, proceed as normal