

Shopping with Purchase Request Form

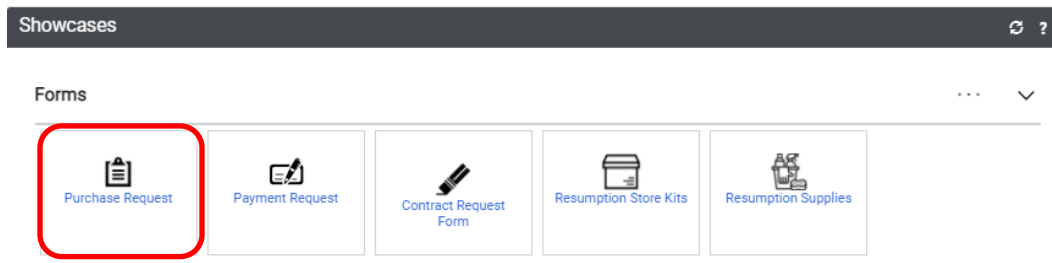
What is a Purchase Request Form?

The Purchase Request form is used to procure goods and/or services from suppliers who do not have a punchout presence in BennyBuy. It can also be used to place specialty orders for items not available in a supplier's punchout site. **Important: In order to use the purchase request form for a supplier, they must first be registered in BennyBuy. Please see the Supplier Invite Request tip sheet for more details on how to invite a supplier to register.**

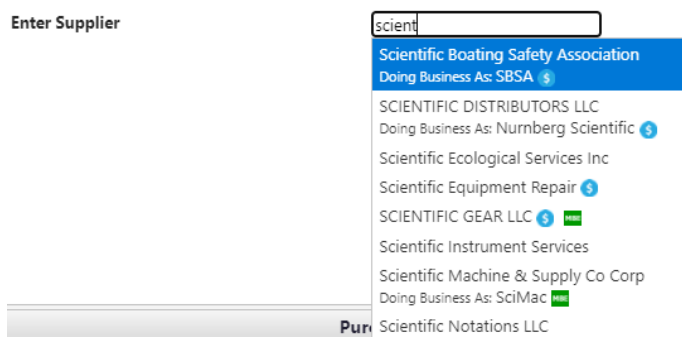
Prior to beginning a purchase request order, ensure your active cart is empty. Purchase request orders cannot be mixed with other order types (punchout, hosted catalog, payment request, etc.)

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1. Under the Forms section in the Shopping Showcase, select the **Purchase Request** form icon.



2. The purchase request form will open in a new window. In the **Enter Supplier** field, begin typing the supplier's name and a list of search results will appear. Select the supplier you would like to use.



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3. After selecting the supplier, review the **PO Distribution** section. If an email (or fax number) already populates, no action is needed, unless you'd like to change where the purchase order is sent to.

Check the box below to customize PO distribution.

PO's will be emailed or faxed to the PO distribution information listed below.

If no information listed below, CHECK THE BOX to add email address...

Email (HTML Body)

srclabue@ucsc.edu

4. If no information has populated in this field, then you will need to specify the email(s) where your order should be sent. To do this, click the checkbox in that field, which will open additional fields. Then, select how you would like the purchase order sent and enter the information in the appropriate field. To send a purchase order to multiple email addresses, separate each one with a comma.

If no information listed below, CHECK THE BOX to add email address...

Fax

Email (HTML Body)

Email (HTML Attachment)

sales@science.com

5. After the **Supplier Information** section is completed, enter the **Product Description**, **Quantity**, and **Unit Price**. If available, input the catalog number. Note that any field shown in bold is required by the form.

If it is a service based order, or you would prefer to create an amount based receipt, click the **“Check to create an amount based Purchase Order”** box.

If you are using a startup fund or other temporary funding source, select Yes on the question regarding Federal Funds. If the purchase is already being charged to Federal Funds, select No.

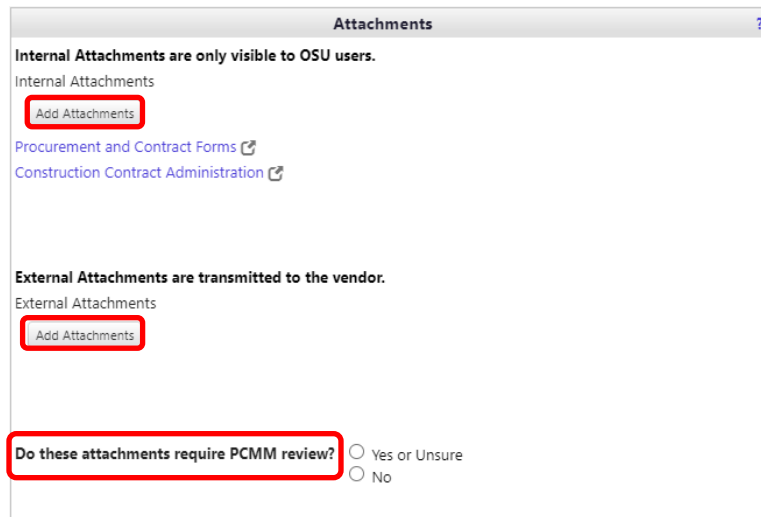
Purchase Details	
Product Description	Item 1 44 characters remaining expand clear
Quantity	10
Unit Price	100
Catalog No.	ABC123
Check to create an amount based Purchase Order	<input type="checkbox"/>
If this purchase is not currently charged to federal funds, will it be in the future?	<input type="radio"/> Yes <input checked="" type="radio"/> No

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6. If any attachments are needed, you can add them in the **Attachments** section. If your attachments require review by Procurement and Contracts Services, select **Yes or Unsure** on the question at the bottom of this section.

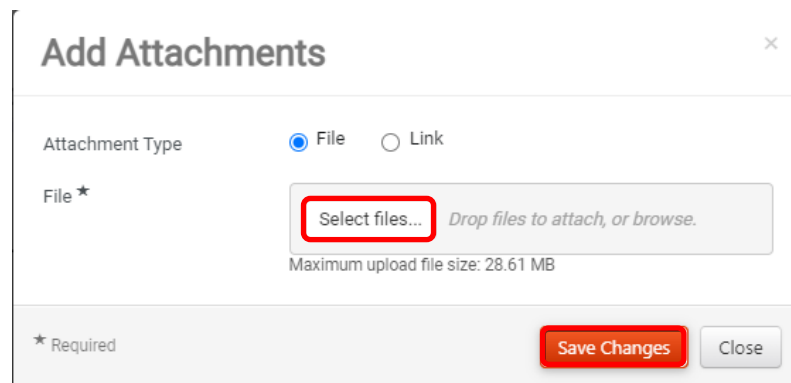
When adding attachments, please note the following:

- ❖ **Internal Attachments:** These attachments are internal to BennyBuy and visible only to OSU users. They are not sent with the purchase order.
- ❖ **External Attachments:** These attachments are sent with the purchase order to the supplier.



The screenshot shows a window titled "Attachments" with a help icon. It is divided into two sections: "Internal Attachments" and "External Attachments". Both sections have an "Add Attachments" button highlighted with a red box. Below the external attachments section, there is a question "Do these attachments require PCMM review?" with two radio button options: "Yes or Unsure" and "No". The "Yes or Unsure" option is also highlighted with a red box.

7. To add an attachment, select the **Add Attachments** box under the appropriate section. A pop-up window will appear. Click the **Select Files...** to browse your computer for the attachment to be added. Once the attachment is selected, click **Save Changes**.

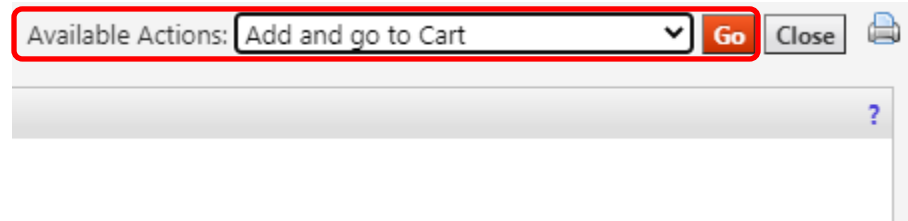


The screenshot shows a pop-up window titled "Add Attachments" with a close button (X). It has two radio buttons for "Attachment Type": "File" (selected) and "Link". Below this is a "File" field with a "Select files..." button highlighted in red, and the text "Drop files to attach, or browse." Below the field, it says "Maximum upload file size: 28.61 MB". At the bottom, there is a "Save Changes" button highlighted in red and a "Close" button. A small asterisk and the word "Required" are visible in the bottom left corner.

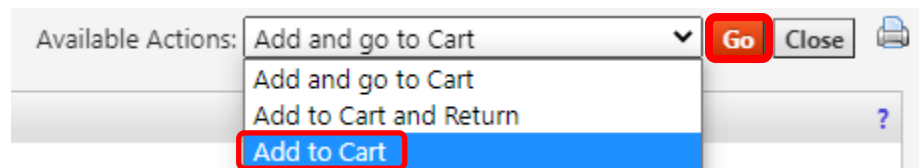
- ❖ If you need to add a link to a web page, change the **Attachment Type** to **Link** and then enter the URL address.

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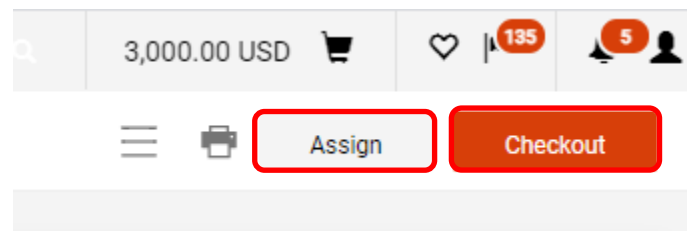
- When you have completed all sections, scroll to the top of the form and select **Add and Go to Cart** from the **Available Actions** menu. Click **Go** and the form will be added to your cart.



- If you need to add multiple product lines to your order, scroll to the top of the form, and select **Add to Cart** from the **Available Actions** menu and click **Go**. This option will add the current item to your cart, but leave the form open with the Supplier Information saved so you can add additional lines as needed. When adding the final line item, change the **Available Actions** menu back to **Add and Go to Cart** and click **Go**.



- After selecting Go, you will be directed to the **Shopping Cart** page. Review your line item(s) to make sure they are correct. From there, in the upper right hand corner, select the **Assign** button to assign your cart to a Requestor, or **Checkout** to complete the checkout process.



- ❖ For a step-by-step walkthrough of the checkout process, please see the Checkout Process tip sheet.