

Hi folks,

Here's some detailed information on the ordering process:

PREAPPROVAL OF ORDERS:

Before you send your orders to me, they **MUST** be preapproved via your professor. Therefore, when I receive the order, I "assume" it's been approved. (It is the professor's funds that they manage and track, so they need to be kept in the loop at all times unless you are directed otherwise).

EMAIL ORDER INSTRUCTIONS:

PLEASE USE EXCEL ORDERING TEMPLATE (attached separately) in **subject** please indicate the following RUSH ORDER; ORDER, MULTIPLE ORDER, ETC.

Coding orders:

For all orders, in general, I need to know what the product is for (usage) (Lab Supply; Chemical; Hardware, Software, Workstation, Fabricated Equipment –need to know name of Fabricated Equipment, etc.). This is for coding purposes so that the order is charged properly for our accounting purposes. Sometimes, the order is not clear to me what it is or what it is for. The more information – the better! ☺

RUSHES: (note in subject section of email)

PLEASE NOTE THAT IT'S BEST TO GIVE ME RUSH ORDERS IN THE MORNING SO THAT I CAN BETTER EXPEDITE THEM FOR YOU. (Anything given to me in the afternoon – may not get processed until the next work day).

Multiple Orders, please separate the order using separate worksheets as it's confusing if they are all on one sheet. For example: name one worksheet FISHER the other VWR, etc. (This is where I have Vendor 1, 2, etc. right click and rename – then click on that worksheet and type in pertinent information.

QUOTES:

When obtaining quotes (a good idea - especially on larger dollar amount orders or multiple line items), please attach quotes when applicable with pertinent order(s) via email or give me hard copy of quote if faxed to you.

SHIPPING:

Please indicate how you want the order shipped. For example: Overnight, 2nd or 3rd, day or Ground (aka: best or cheapest way). Our primary shipper is UPS. I will give the vendor our UPS account number **ONLY** when it's a RUSH to save \$\$\$ on shipping. It is not done with every order. Depending on the order, sometimes it's best to have the vendor ship it the best way from there end –especially if it's hazardous material or a bulky and heavy shipment.

NEW VENDORS:

It is best to provide me all contact information on vendors including address/phone number and contact person when applicable. Also it's best to find out **how** they do business. For example, do they take PO's or Credit Cards? This will save me time when placing orders. Surprisingly,

some vendors are difficult to place orders with (if SU doesn't have an account setup with them) so I must involve Purchasing.

CHARGE NUMBERS:

Be sure to indicate how the order is charged as professors have several accounts in place. Thank you.

Types of order processing:

1. Requisitions:

I place external orders using Requisitions that are approved by my supervisor or professor then forwarded to our Purchasing Dept. via Campus Mail (unless it's a RUSH order – it is then faxed). Any order over \$1000 and/or if chemical products must be done on Requisitions.

For any orders totaling over \$1500 and if FIRM on a vendor, I generally need an explanation (few sentences or more if necessary to make your case). Otherwise, Purchasing could quote it out and delay the order.

2. Procurement Card (aka: Pro Card):

A Procurement Card is used for **non-chemical** orders less than \$1,000 and/or for general RUSH orders. Our departmental budget for Pro Card orders is limited to \$10,000/month so I do pick and choose when to use the Pro Card.☺

3. Internal SU Orders (aka: ID's) (Bookstore), etc.:

An Internal Department Order Form (aka: "ID") is used for Internal SU Orders to the SU Bookstore or internal SU departments for services that need to be paid, etc.. We also have SU Central Stores for Misc. office supplies as well as Corporate Express. Dell and Fisher also have SU online ordering capability that I am privy to.

- 4. Employee Reimbursement when shopping on your own:** We can also reimburse you for any orders you buy on your own when necessary but it's advised to get permission from your professor/adviser and **get a copy of our Tax Exempt form as tax is not reimbursable.** (SU is tax exempt). This is generally done only when you have emergency needs and cannot wait for "normal" processing. **Receipts will need to be submitted with request and you will not be reimbursed on sales tax. An expense voucher will need to be typed and signed by you then approved by supervisor.**

I hope you will find this information helpful. Also, if you have any other questions and/or concerns, just let me know via phone and/or email.

Thank you.

Kindest regards,