Purchasing FAQs

1. **What if the supplier is not in PeopleSoft? How do I obtain a Supplier ID? What is the process for entering a supplier into PeopleSoft?**

   To establish a new supplier a requestor, who reviews the existing database in PeopleSoft and does not find the supplier, must send a blank District's Supplier Intake form and IRS W-9 form to the new supplier for completion. Forward the completed forms to the Business Office for processing. The Business Office will notify requestor when supplier is approved in PeopleSoft.

2. **What if the supplier is a consultant?**

   If the supplier is a consultant, the consultant will need to be set up in PeopleSoft. In addition, the consultant will need to complete the Consultant or Lecture Agreement. Once the agreement is signed by the consultant, the end-user shall   send one **blue inked (original signature)** agreement to the Business Office or assigned Buyer for District Purchasing Supervisor signature. The approved agreement will be returned to end-user to upload to the requisition.

3. **When requesting a quote, does the shipping or freight need to be included?**

   If supplier will be charging freight or shipping costs, the quote should contain the actual or an estimated cost. If quote does not contain a freight or shipping cost, it is presumed there is not a separate cost and the supplier is delivering under the FOB Destination terms of ownership.

   If a shipping or freight cost is later invoiced, but not included on quote, a change order will need to be processed which will impact budget and may delay payment to supplier. Before the quote is provided, confirm with supplier if order will include shipping or freight costs.

4. **I am drafting a requisition, when can I expect a purchase order to be issued (dispatched) to the supplier?**

   Completed requisitions route through multiple approvers based on the funding source used. Funds are encumbered immediately once requisition is budget-checked and submitted. Once requisition is approved, the Buyer will then review for accurate and complete description, proper category code, asset tagging information, quote attachment, final location/destination for delivery and other clarification comments. If requisition is approved by Buyer, it will dispatch as a PO to supplier. The requisition process can be tracked within the Manage Requisitions screen. The process takes about 5-7 business days to complete.

   If at any time during the approval process, a requisition is denied, the requestor will be notified via a PeopleSoft generated email.

5. **Whom do I contact if I am having trouble entering a requisition into PeopleSoft?**

   Please contact Business Office for troubleshooting or training.

6. **Where do I attach supporting documentation (i.e., quotes, etc.)?**

   All supporting documents are to be attached as one single attachment to Line 1 of the requisition.

7. **How many lines can a requisition have?**

   A requisition should have a maximum of 25 line items. If requisition exceeds 25 line items, please create multiple requisitions for the order. You can notate "requisition 1 of xx" in the Requisition Comments and Attachments field on the requisition page. This information will transfer to the supplier as long as you check the boxes "send to supplier."

8. **How should I enter the description for each line item?**

   The **ARMA format will be required** to approve requisitions and dispatch purchase orders for consistency and clarity of receiving. To ensure orders are processed, please follow the **ARMA format rule: Noun, Description, Manufacturer (if applicable), Model/Product Number.**

   Example A: MONITOR, LCD 22" WIDE 1680X1050 W/SPKR, MICROSOFT, P/N# KL3561
   Example B: LAPTOP, ELITE BOOK X360 1030 G2 FLIP

9. **What is the definition of a Supply?**

   Tangible items less than $200 are considered a supply. Consumable items that exceed $200 may also be considered a supply if they have a life expectancy less than one year. Contact Business Office for additional direction if needed.

10. **When do I enter Asset Information into a requisition?**

    Enter Asset Information into a requisition if:
    Any singular item is over $1,000, including shipping and tax
    Any line item contains Computer/AV/IT equipment with a value of $200 or greater
    Any line item contains Software (hard disk or download) with a value of $200 or greater
    Any line item contains a Firearm

11. **What end user contact information is needed on requisitions?**

    The end user's name, email address, and location are required.

12. **Do I enter a requisition line for shipping or freight?**

    Yes, shipping and freight should be entered as a requisition line. Use category code "962-86" for freight and identify line as an Amount Only.

13. **Do I enter a requisition line for tax?**

    No, tax will be added to the requisition by the buyer when it is converted into a PO. Make sure budget is available for tax.

14. **How can I see if a requisition has been approved?**

    A confirmation will be emailed to the requestor once the requisition is final and approved. To check the status of the requisition in PeopleSoft, drill down into the Manage Requisitions screen. Enter the Requisition ID or PO ID number and click search. Click the gray triangle to the far left under Req ID to expand the details of the requisition. The Manage Requisitions screen can be accessed from the Finance Dashboard under Procurement.

15. **Does the supplier get a copy of the Purchase Order?**

    Yes. All Purchase Orders are issued via email. All suppliers must have a current email address in PeopleSoft within the supplier database.

16. **The supplier has not received my Purchase Order, what should I do?**

    First, check the status in Manage Requisitions to make sure the Purchased Order has been dispatched. If the PO has been dispatched, please contact the supplier to verify the email address. Contact the Purchasing Department and request that the PO be re-sent to the supplier. A valid email address is required in PeopleSoft in order for the PO to be dispatched to the supplier. If the email address is incorrect, please complete a Supplier Intake Form and forward to Business Office for processing.

17. If a supplier gives me an agreement to sign, what should I do?

Any agreements requiring signature should be forwarded to the assigned Buyer. Please be sure to provide an email address for the signed agreement to be returned. Agreements are not valid until they are signed by the Purchasing & Contract Services Supervisor.

18. How do I check the balance on an Amount Only PO?

To check the balance of an Amount Only PO in PeopleSoft, use the following navigation**: From NAVBar Select Navigator>Financials 9.2>Purchasing>Purchase Orders>Review PO Information>Purchase Orders.** Enter Business Unit and PO number to view Encumbrance Balance.

19. How do I process a Change Order?

All changes to a purchase order must be initiated by either the requestor or the Business Office at the requisition level. This allows for review and workflow approvals. Once approved and processed, the PO will then be updated and sent back to the supplier. Change orders are needed to increase an Amount Only PO, adjust item pricing, or add freight.

20. What happens if the supplier delivers directly to the requestor?

All goods should be delivered to the campus Stockroom. End users should not accept delivery; instead re-route the supplier to the Stockroom so the ordered items can be received into PeopleSoft. End users are NOT to receive items in PeopleSoft. If the item(s) ordered are delivered directly to the end user, the stockroom must be notified as soon as possible.

When purchasing items that are oversized or heavy in nature, include size and weight details on the initial requisition so Purchasing & Contract Services can add special notes for the driver to coordinate delivery with the stockroom and end user.

21. What should the requestor do if they do not receive an item that was purchased?

The requestor should look up the Purchase Order number; then contact the supplier to see if the item(s) were shipped and obtain the tracking number if shipped. If the item(s) were delivered, the requestor will need to contact the Stockroom to acknowledge receiving.

22. What is the process for Returns and Exchanges?

Returns and exchanges need to be taken to the stockroom with a copy of the packing slip. The stockroom will contact the vendor to make the return or exchange. There are several steps that need to be completed in PeopleSoft therefore the end user should not contact the vendor directly regarding the return or exchange.

23. What is a Confirmation Order?

Purchases that have been initiated and processed by an end-user without a purchase order are "**ILLEGAL.**" The District cannot be held liable for purchases made without a purchase order. All purchases **MUST** have an assigned purchase order number issued by the Purchasing & Contract Services Department prior to making a purchase. If a purchase is made without a PO, the payment cannot be made. **Potentially the end user can be made financially responsible for any order placed without a District authorized purchase order.** In the rare instance a Confirmation Order is allowed, a justification form will be used to complete the transaction.

24. What if I do not want a check mailed directly to the supplier?

Enter special handling instructions on Line 1 of the requisition. Include name and phone number of contract person and complete the Accounts Payable "Request for Special Handling" form. Email completed form to Robin Watkins at rwatkins@sdccd.edu.