QUOTE BASED SPECIAL REQUEST REQUISITION

In order to better manage expenses, it is recommended that any intended purchase over $250.00 include a quote on the Special Request requisition. The requisition should also be a duplicate of the quote when all of the data is entered into the system.

When creating a Special Request Requisition, it is imperative that the following procedure be followed so that potential delays can be avoided during the Purchase Order (PO) process.

Obtain a Quote

The first step in purchasing anything, goods or services, is to get a quote from the intended supplier.

<table>
<thead>
<tr>
<th>For purchases between:</th>
<th>Corresponding quotes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>$250 - $1,999</td>
<td>1 quote is recommended</td>
</tr>
<tr>
<td>$2,000 - $6,879</td>
<td>2 quotes are recommended</td>
</tr>
<tr>
<td></td>
<td>1 written quote is <strong>REQUIRED</strong></td>
</tr>
<tr>
<td>$6,880 - $34,399</td>
<td>3 written quotes are <strong>REQUIRED</strong></td>
</tr>
</tbody>
</table>

An example of a complete quote follows. Note, the key components of a good quote are a quote number, individual line items with specific quantities, part numbers, descriptions, unit prices, and a unique line for shipping/freight if applicable.

Check Supplier Information

When more than one quote is attached to the requisition, the supplier that has provided the winning quote must be confirmed in the system before creating a request.

1. To confirm the Supplier information in PeopleSoft, navigate to **Main Menu > Suppliers > Supplier Information > Add/Update > Supplier**.
2. Search for your supplier on the **Supplier Information** screen by entering in the Supplier Name and clicking the **Search** button.

![Supplier Information Screen](image)

3. Click the appropriate supplier link from the **Search Results** list to view the details.
4. The supplier details will display on the **Summary** tab. This tab provides details on the **Order** address (where the PO is sent), and the **Remit To** address (where the check will be mailed), as well as the current status of the supplier. Confirm this information is complete and correct.

![Summary Tab](image)

5. Click the **Contacts** tab to confirm the name, email address, and phone information is correct for this supplier. The accuracy of this information is important to allow the buyer to reach out to the supplier, if needed. As the requisitioner, you are in touch with the supplier more frequently and know if this needs to be updated or corrected. Note – if the counter in the upper right corner of the screen indicates 1 of X, click the right arrow to view the next record.
6. If any of this information is incorrect or incomplete, fill out the **Supplier Maintenance Form**, found on the Procurement Services website under Forms and submit it via email to the Supplier Create team at [Suppliercreate@montclair.edu](mailto:Suppliercreate@montclair.edu) ASAP to have the data updated in the system. It takes approximately 5 business days to enter and approve Supplier Create / Maintenance information into FMS once all information and supporting documentation is submitted.

7. Click the **Identifying Information** tab, and select the **Government Classifications** arrow to view the current document(s) associated to this supplier. Due to government regulations, specific financial thresholds, as follows, require additional documentation in order for the University to complete business with suppliers.

   - **$5,160.00** – Need a Business Registration Certificate – (BRC)
   - **$6,880.00** – Need a BRC & 3 Quotes
   - **$17,500.00** – Need a BRC, 3 Quotes, & Chapter 51/EO134 Form
   - **$34,400.00** – Requires an RFP & Affirmative Action Certificate

### Special Request Requisition Notes

Once the quote has been received and the supplier has been confirmed, the requisition should be created in the system.
Freight and Shipping
When requesting a quote for goods, have estimated shipping and freight charges included and itemized within the quote. The specific freight and shipping charges must be included as individual line items to ensure an accurate budget check is executed. The Freight category number is 91557 (account 60422).

Attachments
For any request between $250 and $1,999 it is suggested to attach one (1) quote onto the first line within the requisition.

For requests between $2,000 and $6,879 one (1) written quote is required to be attached to the first line of the request. It is suggested that two (2) quotes be attached.

For requests between $6,880 and $34,399, three (3) written quotes are required to be attached to the first line of the requisition.

Line Items
Line items should be described in the same manner they are listed on the supplier’s quote. This will ensure that the purchase order and requisition both line up with the invoice from the supplier, and make receiving the goods or services easier as all items should then be broken down the same way.

Zero Value Lines in a Request
Should a request include line items that have a cost of $0, that line item should NOT be included within the line of a requisition. In order to document a zero value line, include the information of the $0 item within the additional comments of the previous line item. This will ensure that the item is included in the requisition, but will also allow that the request can be closed. As no receiving can be completed on a $0 line item, any requests with these items will automatically stay open and disrupt the management of requisitions.

Discounts on Line Items
If a request includes a discount, that discount should be included as a separate line item with a negative price within the special request requisition. The negative price will be included within the requisition as the discount and should be received in proportion to the overall items it is related to within the request.

Enter the Requisition
1. To access the link to the Special Request Requisitions, follow the menu path: **Main Menu > eProcurement > Requisition.**

2. On the Create Requisitions screen, select the **Special Requests** link.
The blank request form displays. Complete the form for each specific line (individual good or service being requested) within your requisition. Note: each line item should be based on the supplier’s quote.

3. When the requisition form displays, complete the following fields:
   a. **Description** – add in a complete and detailed description of the item(s) or service(s) being requested. For the initial form, which will become line 1 of the request, the quote number should be entered first. Then on line 1 and for every line that follows the manufacturer (Mfr), Part number, and description should be listed as written on the quote.
   b. **Price** – enter the price for the item or service based on the unit of measure (i.e.-each, dozen, hours, weeks).
   c. **Currency** – leave this field as the default, USD.
   d. **Quantity** – enter the quantity of the request based on the unit of measure.
   e. **Unit of Measure** – enter the standard measurement of the item(s) or service(s) being requested. To view the list of options, click the search icon (magnifying glass) to the right of the field.
   f. **Category** – the category is the PeopleSoft version of the Account code. Refer to the Category Code-Account Code Crossmap on the Procurement Services site to see a reference of all categories and accounts listed alphabetically by description. Note, the account code is locked so any changes to the account will need to be initiated by changing the Category code.
   g. **Supplier ID/Name** – if you know the Supplier ID number, enter it in the corresponding field. Otherwise, click the magnifying glass to search your supplier’s name. Enter part or all of the supplier’s name in the Name field of the Supplier Search pop-up window and click Find. From the results list, click the supplier to use for this request.
   h. **Additional Information** – if you have a supplemental description of the item or service being requested, or further information for the supplier or internal MSU departments, enter it into the Additional Information field. To have the supplier view the details, click the **Send to Supplier** checkbox.
4. When you have entered all of the information on this item to purchase, click the Add to Cart button to continue.

5. If you have another line item to add to this request, complete the blank form that displays on the screen, and repeat this process until all items/services have been added to the request.

6. Once all items have been entered, click the Checkout button to continue.
NOTE: All requisitions must be budget checked before submitting. The note displayed reinforces that a budget check must occur before requisition can be submitted.

7. Click the **OK** button to proceed

Complete the requisition header information.

8. Click in the **Requisition Name** field and enter a unique name for this requisition.
9. Click the **Purchasing Methodology** drop down arrow to select the correct purchasing method.
10. Click in the **Contract/Waiver #** field and enter the correct contract number. Get the Contract number from the Procurement Services website.
11. Scroll down to the body of the requisition where your line item details are listed out.

To ensure the correct items and services have been purchased for the University, it is recommended to attach backup documentation, such as a quote or sole source justification (if applicable), to all requisitions over $250. **All documents should be attached to the first line of the requisition.**

When the Buyer reviews the request, the backup documentation provides details to allow for more precise confirmation of Category & Account codes and supplier selections.

12. To add attachments to a requisition, click the **Add Comments** icon on the first line of the requisition in PeopleSoft. Note, the icon will read “**Edit**” if there are comments or attachments already added.

13. Click the **Add Attachments** button.
14. Click the **Browse** button in the Upload field to navigate to the file to attach.
15. Click the file name of the item to attach.
16. Click the **Open** button
17. Click the **Upload** button to attach your file to the purchase requisition
18. Click the **Send to Supplier** checkbox on the corresponding line of your attachment to make sure the supplier gets your file.
19. Click the **OK** button to return to the body of your requisition.
For each line item, you will need to indicate the Ship To and Accounting codes for the goods ordered.

20. Click the **Show Ship To and Accounting** button (the right pointing arrow to the far left of your line item) on your order line.
21. In the Ship To section, click the **Ship To Look Up** button (magnifying glass) and select the appropriate location. 
   Note: MSU01 is the default location for 1 Normal Avenue.
22. The “Attention To” field is required to be completed to include the Requestor’s Name/Building Code and Room Number/Extension. An example of this information is: **Sue Johnson/UNIV5100/1234**. There is a 30 space limit within the “Attention To”, which includes the slashes and spaces. If this information is not completed, the request cannot be saved and processed.
23. Enter a delivery date in the Due Date field for the requested items.
24. Click the **Expand Section** button in the Accounting Lines section of the screen.

To split the cost of the event:

25. On the Chartfields1 tab in the Accounting Lines section, click the plus sign to the right of the line item to add another cost line.
26. Enter the percent of expense for each line. **Note:** the overall percent of the line item MUST equal 100.

To complete the Accounting Information:

27. Click the Chartfields2 tab to enter the appropriate Chart of Accounts information for each line.

The Accounting information will be pre-populated based on the CWID entered at sign in. Typically, these fields will not need to be changed unless you are ordering for your non-primary business area.
If you need to change any of the Chartfield codes, click the **Look Up** button (magnifying glass) of the corresponding field and search for your code.

28. If you are purchasing for a grant or capital project, also complete the PC Bus Unit, Project, and Activity fields.

29. In the **Enter requisition comments** field and enter any comments to send to the supplier.

30. Click the **Send to Supplier** checkbox to include these comments on the PO.

31. Click in the **Enter approval justification for this requisition** field and enter any comments your approver or Procurement buyer may need to see regarding this requisition.

Purchase requisitions cannot be submitted without a budget check performed.

32. Click **Save for Later** to store your purchase requisition while you perform budget checking.

33. Click the **Check Budget** link. If your Budget Check produces an Error code, review your budget report to confirm there is enough money in the account and the chartfield string to ensure the correct codes are used before contacting the Budget Department. If the purchase is for a grant, then contact Grant Accounting instead of the Budget Department for any budget issues.

34. Once a Valid status displays for your budget check, you can click the **Save & submit** button to submit the purchase requisition for approval.

The Purchase Requisition Confirmation screen will display with the purchase requisition name and number listed and the approval flow for the request.

**Purchase Order**

After the request has been submitted and approved by the Department Manager and the Procurement Buyer, a purchase order will be created and dispatched to the supplier.

The purchase order should reflect the lines of the quote and the lines of the requisition, as seen in the screen shot below.