

Purchase Requisition Forms

This how-to sheet outlines the steps required to:

- Fill out a purchase requisition form.
- The information to fill out this form comes from a vendor's quote. Prior to filling out your requisition, make sure you received the required number of quotes.

eShop's purchase requisition form should be used for:

- Non-catalogue items, services (including consulting), and standing orders.
- Requisitioning goods or services above the \$25,000 threshold, or for low dollar value purchases where the vendor does not accept a purchasing card.

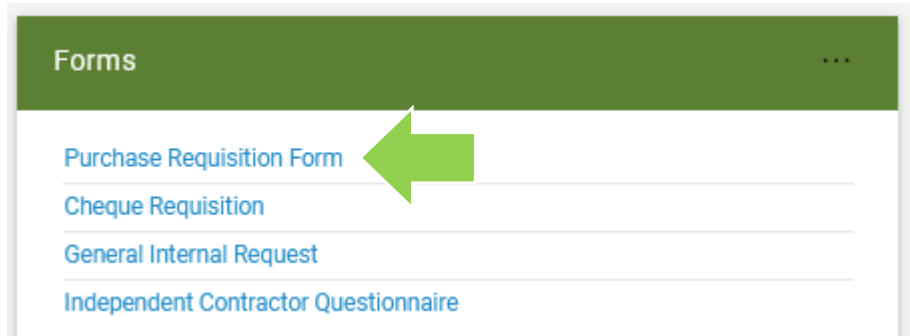
Additional information is available:

- The Procurement Policy ([available on the University Secretariat's website](#))
- [The 'How to Buy' page on Procurement Services' page](#)


THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. Once logged into eShop, scroll down to the **'Forms'** box on the landing page.

Click on the blue **'Purchase Requisition Form'** text.



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2. The first section on the form tells you what the form is for and any important information about filling it out.



Form Instructions

Completion of this form is **mandatory** for orders over \$10k, but may be used for any order not found in eShop catalogues. Required fields have an **asterisk (*)**. As per the [University Procurement Policy](#), the **Competitive Bid Requirements** section must be completed so that Procurement Services can confirm and document that the appropriate number of quotes were obtained **or** if a limited tendering justification is valid **or** if an RFP has previously been awarded. Please verify the currency is correct when selecting the vendor (the vendor may have multiple currencies available). For further assistance, please contact [Procurement Services](#).

Tip: If at any point you want to close the form, without saving it or adding it to a cart, click on the grey 'Close' button in the upper right-hand corner of the screen.

Tip: Only those fields with a star must be filled in (e.g. 'Enter Vendor').

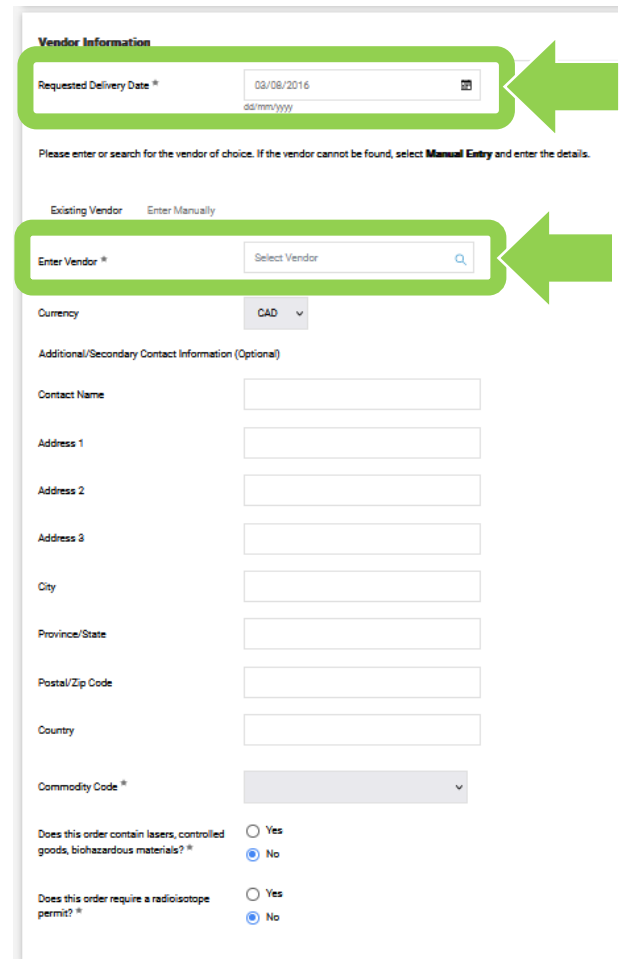
3a. In the 'Vendor Information' box

...


Choose a '**Requested Delivery Date**' with the date you want to receive the item on.

Begin typing the name of the vendor in the '**Enter Vendor**' field.

If the name of the vendor comes up, click on it. The information related to that vendor will fill in automatically.





Vendor Information

Requested Delivery Date * 03/08/2016 
dd/mm/yyyy

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details.

Existing Vendor Enter Manually

Enter Vendor * Select Vendor 

Currency CAD 

Additional/Secondary Contact Information (Optional)

Contact Name

Address 1

Address 2


Address 3

City

Province/State

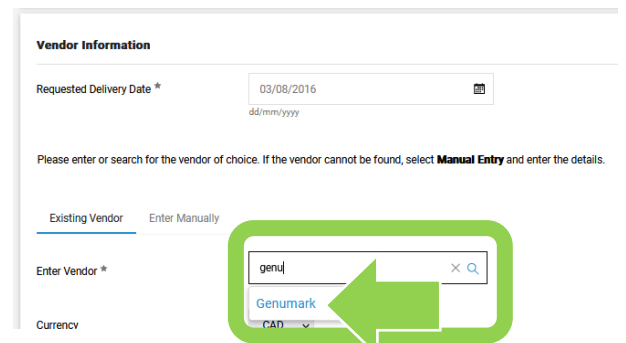
Postal/Zip Code

Country


Commodity Code * 

Does this order contain lasers, controlled goods, biohazardous materials? * ☐ Yes ☒ No

Does this order require a radioisotope permit? * ☐ Yes ☒ No





Vendor Information

Requested Delivery Date * 03/08/2016 
dd/mm/yyyy

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details.

Existing Vendor Enter Manually

Enter Vendor * 
Genumark

Currency CAD 

3b. In the 'Vendor Information' box

...

If no result are returned ...

Click the 'Enter Manually' tab.

The screenshot shows the 'Vendor Information' form. The 'Requested Delivery Date *' is set to 03/08/2016. Below it, a message says: 'Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details.' There are two tabs: 'Existing Vendor' and 'Enter Manually'. The 'Enter Manually' tab is highlighted with a green box and a green arrow points to it. Below the tabs, the 'Enter Vendor *' field contains 'unknown company' and a search icon. A 'Try searching again' button is visible. The 'Currency' dropdown is set to 'CAD'.

Type the vendor's name, as it appears on the quote, in the 'Vendor Name' field.

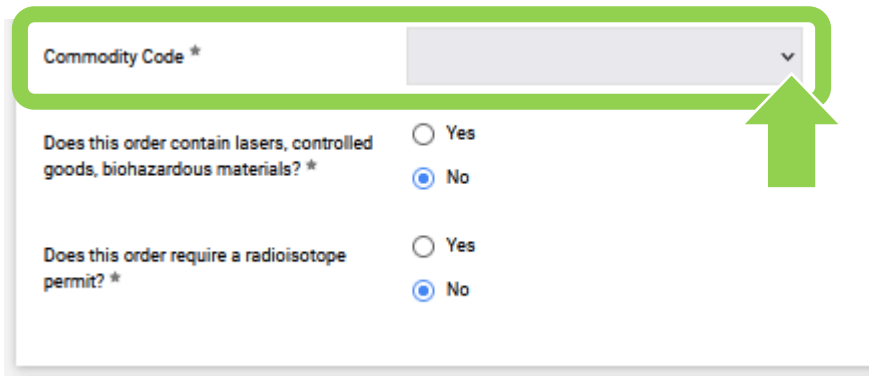
The screenshot shows the 'Vendor Information' form with the 'Enter Manually' tab selected. The 'Vendor Name *' field is highlighted with a green box and a green arrow points to it, containing the text 'Unknown Company'. Below this are fields for 'Vendor Website', 'Vendor Phone' (with a sub-label '(Country, Area, Phone, Ext)'), 'Vendor Fax No.' (with a sub-label '(Country, Area, Phone)'), and 'Vendor Email'. The 'Currency' dropdown is set to 'CAD'. At the bottom, the 'Distribution Method *' section is highlighted with a green box. It contains a message: 'This information will be used by Accounts Payable and Purchasing Services to contact the vendor, if needed.' and a checked radio button for 'Choose the preferred method (Required)'. Below this are two radio buttons: 'Fax' (checked) and 'Email (HTML Body)' (unchecked). The 'Fax' field contains the number '555-555-5555'.

Choose the vendor's preferred method of communication by clicking on the radio box beside either the 'Fax' or 'Email (HTML Body)' field AND enter the information.

3c. In the 'Vendor Information' box
...

Choose the '**Commodity Code**' that is the best fit for your purchase from the drop-down list.

Tip: Commodity codes allow eShop to route documents and compare like items. [If needed, there is a complete list of commodity codes and associated account codes available.](#)



Commodity Code *

Does this order contain lasers, controlled goods, biohazardous materials? *

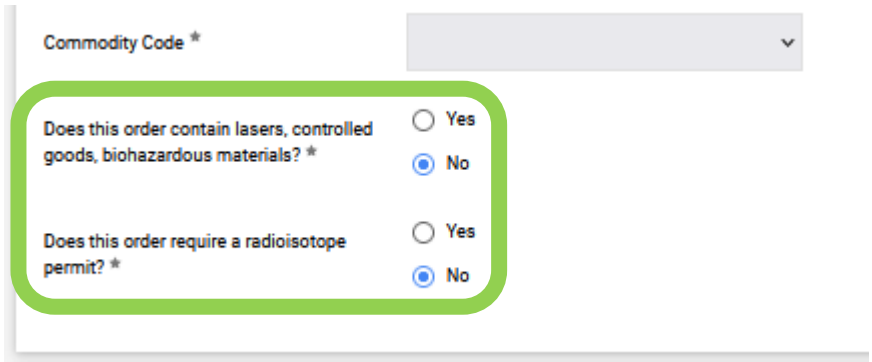
Does this order require a radioisotope permit? *

☐ Yes
☒ No

☐ Yes
☒ No

3d. In the 'Vendor Information' box
...

Click on the radio button beside either 'Yes' or 'No' to answer each of the questions.



Commodity Code *

Does this order contain lasers, controlled goods, biohazardous materials? *

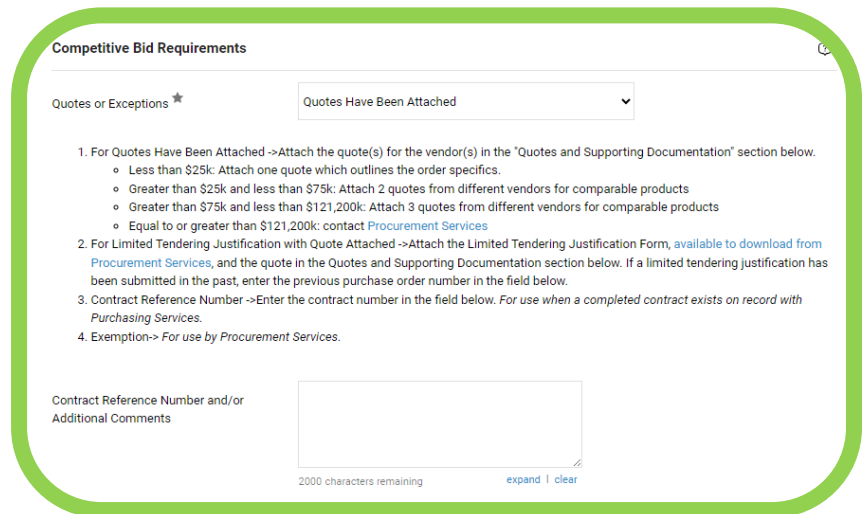
Does this order require a radioisotope permit? *

☐ Yes
☒ No

☐ Yes
☒ No

4. Follow the instructions in the **‘Competitive Bid Requirements’** section to fill in the required information.

If you have questions, click on the blue ‘Procurement Services’ text.



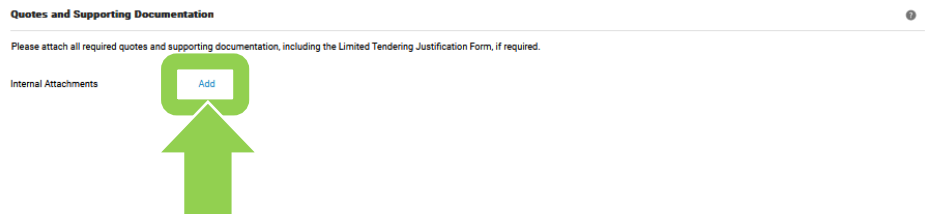
The screenshot shows a form titled "Competitive Bid Requirements". At the top, there is a dropdown menu labeled "Quotes or Exceptions" with a star icon, currently set to "Quotes Have Been Attached". Below this, there are four numbered instructions:

- For Quotes Have Been Attached -> Attach the quote(s) for the vendor(s) in the "Quotes and Supporting Documentation" section below.
 - Less than \$25k: Attach one quote which outlines the order specifics.
 - Greater than \$25k and less than \$75k: Attach 2 quotes from different vendors for comparable products
 - Greater than \$75k and less than \$121,200k: Attach 3 quotes from different vendors for comparable products
 - Equal to or greater than \$121,200k: contact [Procurement Services](#)
- For Limited Tendering Justification with Quote Attached -> Attach the Limited Tendering Justification Form, [available to download from Procurement Services](#), and the quote in the Quotes and Supporting Documentation section below. If a limited tendering justification has been submitted in the past, enter the previous purchase order number in the field below.
- Contract Reference Number -> Enter the contract number in the field below. *For use when a completed contract exists on record with Purchasing Services.*
- Exemption -> For use by Procurement Services.

At the bottom, there is a text input field labeled "Contract Reference Number and/or Additional Comments". Below the field, it says "2000 characters remaining" and has "expand" and "clear" links.

5. You must attach all relevant supporting documentation (e.g. quotes).

In the **‘Quotes and Supporting Documentation’** box, click on the blue ‘Add’ button and follow the prompts to add required documentation.



The screenshot shows a form titled "Quotes and Supporting Documentation". At the top, it says "Please attach all required quotes and supporting documentation, including the Limited Tendering Justification Form, if required." Below this, there is a section labeled "Internal Attachments" with a blue "Add" button. A large green arrow points to the "Add" button.

6. Referencing the vendor's quote, enter each item in an **'Item Description'** field with the corresponding **'Unit Price'** and **'Quantity'**.

Tip: Click on the 'recalculate' icon total' (the green icon is pointing to the icon) to calculate the total.

Item Description	Unit Price	Quantity	Ext. Price
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
			0.00
Total			0.00

7. Once you have completed the form, click on the red **'Arrow'** button to choose an option from drop-down menu to add the form to a cart (e.g. 'Add to Cart').

Tip: Purchase Requisition forms should not be added to a cart with anything else.

47.50 CAD

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Close

Add And Go To Cart

Add to Cart and Return

Add to Cart

Add to Draft Cart or Pending PR/PO

Add to new Cart

What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.