

## GUIDE TO PROCESSING AND SUBMITTING A PURCHASE ORDER

This reference guide will assist the user in preparing a Purchase Order. The complete Purchasing Policies and Procedures can be accessed here: <https://www.fdu.edu/wp-content/uploads/2022/04/purchasing-policies.pdf>

***AN APPROVED PO MUST BE IN PLACE BEFORE ANY GOODS OR SERVICES ARE RECEIVED.***

Requests for purchases must be initiated using the Purchase Requisition/Order Form. [https://purchase-orders.fdu.edu/secure/po\\_pdf.pdf](https://purchase-orders.fdu.edu/secure/po_pdf.pdf)


**We emphasize the need for departments to plan their needs well in advance and allow sufficient time for the review process.**

Submit completed requisitions including pertinent back-up and approvals to [requisitions@fdu.edu](mailto:requisitions@fdu.edu). Attach only one PO per email.

The PO must be signed by the budget officer responsible for the account identified as the source of funding and approved in accordance with signatory approval\*. It can be a physical or electronic signature, or an email authorizing the purchase. **The budget officer is responsible for checking that funds are available to cover the expense before submitting the PO to Purchasing.**

\*For **addendums**, the dollar amount of the original PO plus the amount of the addendum must not exceed the signer's total signing authority limit.

All Purchase Orders must include the following information to avoid delays.

| PURCHASE REQUISITION/ORDER   |  |   |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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|  <b>FAIRLEIGH DICKINSON UNIVERSITY</b>  |  | <b>PURCHASING DEPARTMENT</b><br>1000 RIVER ROAD, T-PB1-01<br>TEANECK, NEW JERSEY 07666<br>201-692-2050  |                     | <b>NOT VALID WITHOUT PURCHASE ORDER NO.</b><br>SHOW THIS NUMBER ON ALL PACKAGES, INVOICES, CORRESPONDENCE, ETC. |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |   |                     | PAGE _____ OF _____   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>SHIP TO:</b>  | <b>DEPT. NAME</b><br><b>ADDRESS</b><br><b>MAIL CODE</b>  |   | <b>PHONE# ( )</b>   |   | <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th>AMOUNT</th> <th>FUND</th> <th>UNIT</th> <th>LOCA-TION</th> <th>IDENTIFIER</th> <th>OBJECT CODE</th> </tr> </thead> <tbody> <tr> <td>dollar</td> <td>cent</td> <td>2digit</td> <td>2digit</td> <td>2digit</td> <td>7digits</td> </tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> |             | AMOUNT     | FUND           | UNIT                         | LOCA-TION   | IDENTIFIER  | OBJECT CODE       | dollar                | cent | 2digit | 2digit | 2digit | 7digits |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| <b>EMAIL FOR COPY OF APPROVED PO</b>   |  | <b>INVOICING INSTRUCTIONS TO SUPPLIER</b><br><input checked="" type="checkbox"/> SAME AS SHIP TO <input type="checkbox"/> SEE INSTRUCTIONS IN DESCRIPTION                     |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>SUPPLIER</b>  | <b>FULL NAME &amp; ADDRESS OF VENDOR</b>   |   |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | <b>VENDOR EMAIL</b>  |   |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | <b>SUPPLIER NUMBER</b>   |   |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  | <b>THIS ORDER IS SUBJECT TO THE TERMS AND CONDITIONS ON THIS PAGE AND THE PURCHASE ORDER GENERAL TERMS AND CONDITIONS WHICH CAN BE FOUND AT: <a href="http://fd.edu/potermis">http://fd.edu/potermis</a>; BUYER'S ACCEPTANCE OF SAME SHALL BE DEMONSTRATED BY ITS FULL OR PARTIAL PERFORMANCE HEREUNDER.</b> |   |                     |   |  |             |            |                |                              |             |   |                   |                       |      |        |        |        |         |                     |                     |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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- WE ARE EXEMPT FROM NJ STATE SALES TAX. CERTIFICATE NO. E221-494-434/001
- UNLESS OTHERWISE SPECIFIED PRICES ARE F.O.B. DESTINATION.

Requisitioned by NAME Date \_\_\_\_\_

Approved by (Print Name) \_\_\_\_\_

Signature BUDGET OFFICER Date \_\_\_\_\_

Approved by (Print Name) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

**• ORDER NOT VALID UNLESS SIGNED BELOW FOR FAIRLEIGH DICKINSON UNIVERSITY BY DIRECTOR OF PURCHASING**

SIGNED: \_\_\_\_\_

## **Backup documentation**

Supporting documentation such as quotes, proposals, contracts, etc., **MUST** be attached to the Purchase Order submission. Purchase Orders cannot be processed if the pertinent documentation is not included. POs requiring contract review, or the use of logos, etc. need the approvals attached when submitting POs.

See approval section 5.0 of the Purchasing Policies and Procedures

## **Restricted Funds**

Fund availability for POs charged to **restricted funds** 11,21 and 60 must be approved by Accounting before the PO is submitted to Purchasing.

Please send your PO requisition to Amy Tandingan, Senior Accountant ([amyt@fdu.edu](mailto:amyt@fdu.edu)), to request fund approval only when charging **restricted funds 11, 21, and 60**.

Attach the email with her approval to your PO submission as part of the backup and submit to purchasing at [requisitions@fdu.edu](mailto:requisitions@fdu.edu)

## **Logo use**

Approval from the Vice President for Communications is required prior to using the University name or logo. Please attach this approval as backup to your PO upon submission. Please see section 5.4 of the Purchasing Policies and Procedures.

## **IT Purchases**

For a list of approved docking stations, monitors, etc., and complete OIRT policies please visit <https://it.fdu.edu/>.

## **Contract Review** (if applicable)

This policy is to ensure that any commitment of university resources and all related agreements obligating the University are properly reviewed and approved. The link to the Contract Review Policy is as follows:

<https://www.fdu.edu/wp-content/uploads/2019/09/14902.pdf>

Once the Contract Review process is complete, the Purchase Order can be created and submitted to Purchasing. All necessary backup such as quotes, contracts, agreements, approvals, and confirmation from Contract Review to move forward with the PO, must be included. The Purchasing Department will send the approved PO and the signed contract/agreement to the vendor and to the ordering department. **Contracts cannot be sent to the vendor without an approved PO in place.**

### **Certificate of Insurance (COI)**

A COI is required for all vendors coming on campus to deliver goods or provide services.

<https://www.fdu.edu/about/university-leadership-offices/office-of-risk-management/>

### **Addendums**

An addendum is necessary when more funds are needed due to additional costs not listed on the original estimate. Some examples are shipping costs or additional attendees at an event, or over-runs on production.

The original PO# must be noted on the addendum, and back-up substantiating the addendum must be submitted to [requisitions@fdu.edu](mailto:requisitions@fdu.edu).

### **Steps to Fill Out an Addendum:**

- Use the regular PO form and fill in the ship to and supplier information as normal.
- In the amount section, only put in the amount you want to add to the original PO.
- In the description section, note "addendum" and the original PO number with a description of why the addendum is needed. Please attach all pertinent backup.

## GENERAL INSTRUCTIONS FOR EVENTS AND TRAVEL POs:

### On-Campus Events

PO must include:

- Date, time, and location of event
- Event description (performance, activities, etc.)
- **Required backup:** Completed Event Production Agreement (EPA) obtained from General Counsel—this is a pre-approved contract that does not require review unless any changes/additions are made to the terms.
- Special equipment needed, such as generators, etc.
- Number of attendants to be present
- NEW vendors must submit a current Certificate of Insurance (COI). The COI must be included with the PO submission.
- DO NOT SIGN QUOTES/ PROPOSALS

### Off-Campus Events

PO must include:

- Date, time, and location of event
- Number of participants (students/faculty/ staff)
- Amount and due date of a required deposit. The ordering department is responsible for following up with AP regarding the deposit payment.
- **Required backup:** Quotes, reservations, etc.

### Off-Campus Dinners / Banquets

PO must include:

- Date, time, and location of event
- Number of participants (students / faculty / staff)
- Amount and due date of any required deposit. The ordering department is responsible for following up with AP regarding the deposit payment.
- **Required backup:** Quote/Contract for banquets and approval from Contract Review if applicable
- Completed Alcohol Use Form if applicable

**Events on Campus with Alcohol** – A PO for the university-approved liquor vendor must be submitted and approved prior to the event. The department should inform the university's catering service of the event and coordinate the delivery. Unused alcohol should be returned for a credit to the liquor vendor.

Before creating a PO, please review the University's Alcohol Use Policy.

PO must include:

- Date, time, location, and type of event
- Date and time the delivery must be made to the university's catering service
- Name and phone number of staff/department contact present on the day of the event
- Write on PO: DELIVER TO ARAMARK
- Quote
- Completed Alcohol Use Form

## **STUDENT TRAVEL & LODGING**

All travel and lodging must be processed using a Purchase Order.  
All overnight lodgings require a review and approval by Risk Management.  
Please attach the approval when submitting the PO to Purchasing.

### **Student Air Travel for University sponsored trips**

PO must include:

- Date, destination/event
- Number of passengers, flight numbers, departure, and destination airport
- DO NOT INCLUDE ANY WISP OR PI INFORMATION!
- **Required backup:** Booking confirmations and approval from Risk Management
- DO NOT SIGN QUOTES/RESERVATIONS

### **Student Lodging**

PO must include:

- Name of event lodging is needed for
- Check in and check out dates
- Number of rooms, number of nights, and cost per night
- Any additional taxes or charges
- Reservation number(s)
- Number of faculty /staff / students
- **Required backup:** Reservation confirmations. If a contract is used, attach approval from Contract Review
- Approval from Risk Management

### **Student Bus/Ground transportation**

PO must include:

- Date, time, name of event and destination of trip/travel
- Trip confirmation number
- Pick up / Drop off times including location address
- **Required backup:** Trip confirmations and cell number for faculty/staff trip leader

- DO NOT SIGN QUOTES/RESERVATIONS. The only exception is Country Club Services. The signed contract is sent to the vendor along with the PO and the department needs to send a copy to Contract Review.

## **INVOICING**

Invoices should be reviewed for accuracy prior to sending to Accounts Payable.

**The Purchasing Department does not process invoices.**

Any questions related to invoices / payments need to be directed to the AP Manager.