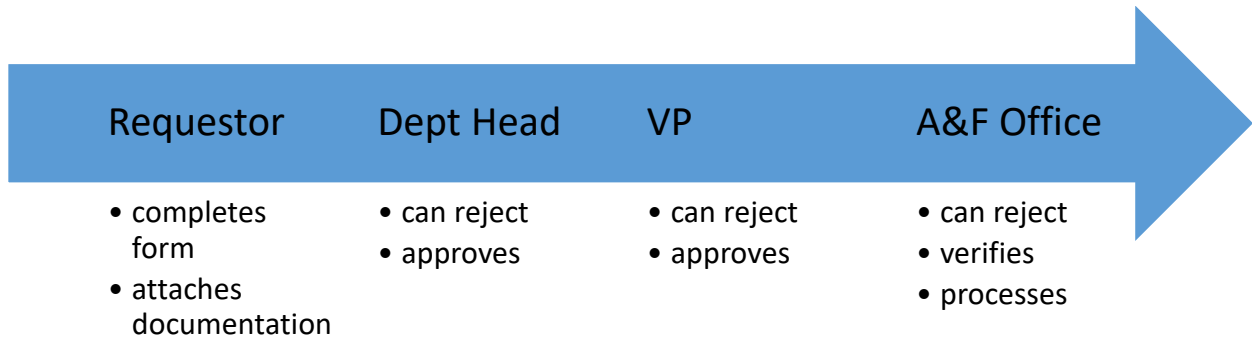


Purchase Order Form Instructions

Overview:

The purchase order form will be used for purchasing goods. All purchases must be approved by the department head and/or VP (per the purchasing policies). Please contact the A&F office if there are any questions.



The requestor will be able to access the form via the MCLA portal, under Forms, my forms. The form is completed and then sent along to the appropriate department head to sign. The department head and the VP have the option to reject the order. In this instance the requestor will be notified through email and the form will need to be revised or canceled. Once the department head approves and signs, the form is directed to the appropriate VP, then to A& F to be verified and processed. All signers will have access to the form and its status via Dynamics Forms.

Click the link to open the purchase order form or access through MCLA portal, Forms, My Forms (Dynamics Forms), Admin & Finance.



Purchase Order #: _____

Order Date: _____

Vendor Name: * Vendor Code:

Vendor Phone #: *

Vendor Address: * Apt:

City: * State: * Zip: *

Order Method *

Complete the vendor information including the address, and phone number. Then choose the order method – fax, email, online. You will then need to add in the fax number, email address, or vendor website.

Next Enter the MCLA Dept and to whom the items shall be delivered in the “Attn:” field. There is an option to attach files such as quotes or screenshots of shop carts, i.e. amazon orders.

Purchase Order Form Instructions

MCLA Dept.: * Attn.: *

Quantity	Description	Unit Cost	Total Cost
* <input type="text"/>	* <input type="text"/>	* <input type="text"/>	\$ 0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$ 0.00
Total Amount:			\$ 0.00

Number of Attachments: * -- Please Select -- ▾

Next choose the number of accounts by which the purchase will be funded. Up to 3 accounts may be selected. Be sure to fill in the amount for each funding line selected. If there are any questions on account codes please contact the Admin & Finance office.

Accounts to be Charged

Over how many accounts will this purchase order be divided?

▾

Fund	Department	SubObj	Object	Category	Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	* <input type="text"/>

Approvals

Select the appropriate Department Head using the drop down. Then click to sign as the requestor. (if you are the department head, you'll need to select yourself and sign again as department head). Click Submit Form button at the bottom of the form. The payment form is now routed to the Department Head for signature. If the payment requires a VP signature, the department head will select the VP Signature needed and route the form to the appropriate VP.

Requester's Signature:

*

Signature

Department Chair

* -- Please Select -- ▾

Department Chair's Signature:

*

Signature

Department Head Instructions:

You will receive an email asking for your approval for a purchase order from mcla-forms@mcla.edu. Click the link or access the forms in the portal. Please take this opportunity to look at the request, be sure the amount, account code, and purpose is appropriate. You have the option to reject the request by clicking the button at the bottom. If the request is rejected you will be prompted to complete an email back to the last office (the requestor) stating the reasons for the rejection. The requestor will need

Purchase Order Form Instructions

to make the necessary corrections and resend to Department Head for signature. You also have the option to fill in a different amount approved if necessary.

If the request is approved, then sign as the department head and choose if the request requires VP/PRES signature, then choose the appropriate VP. Click submit. The form is now routed to the VP/Pres.

Does this request require a VP/PRES signature? * Yes * to be completed by Department Head/Chairperson

Choose the appropriate VP

-- Please Select --

Reject

Submit Form

VP/Pres Instructions:

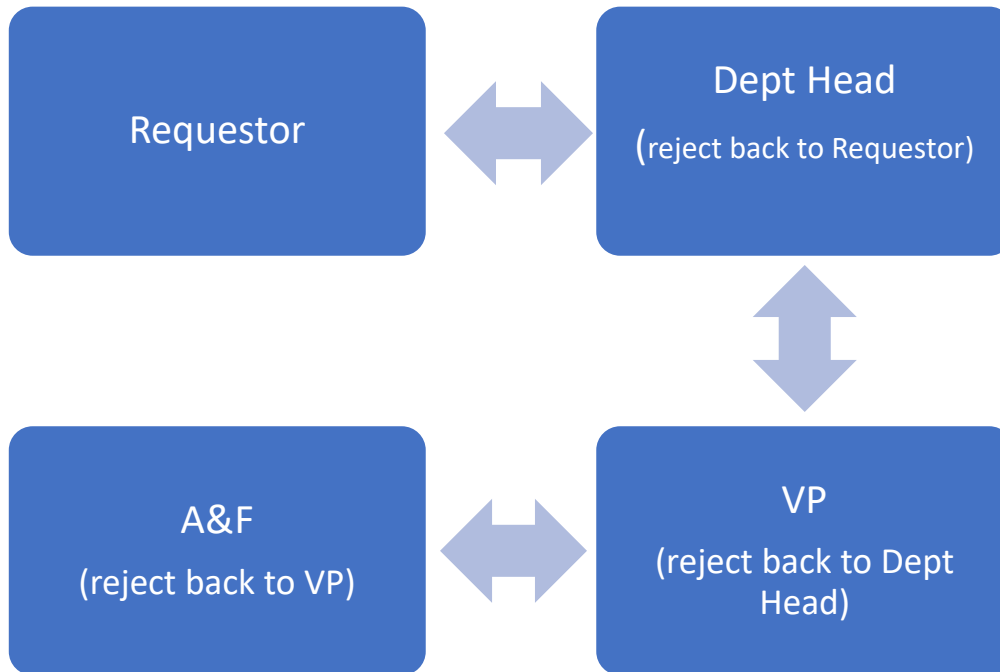
You will receive an email from mcla-forms@mcla.edu stating that your signature is required for approval. Click the link or access the form in the portal. Please take this opportunity to look at the request, be sure the amount, account code, and purpose is appropriate. You have the option to reject the request by clicking the button at the bottom. If the request is rejected you will be prompted to complete an email back to the last office (the department head) stating the reasons for the rejection. The Department Head will then need to reject the form back to the requestor to correct. The requestor will need to make the necessary corrections and resend to Department Head for signature. If the request is approved, then sign as the VP/Pres and click submit.

The form is then sent to the Administration & Finance office for processing.

Tips & Tricks

It's important to know that the requestor "owns" all the fields when submitting the form. With that in mind know that when a form is rejected only the requestor will be able to edit the fields, for example account number, description, etc. See the flow chart below.

Purchase Order Form Instructions



Always contact the Administration & Finance with any questions or concerns.