

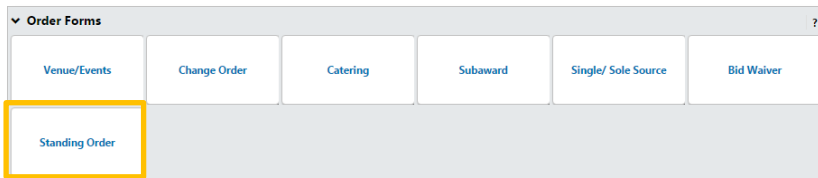
## STANDING ORDER PROPER USE

**Standing Purchase Orders** may be used when the University:

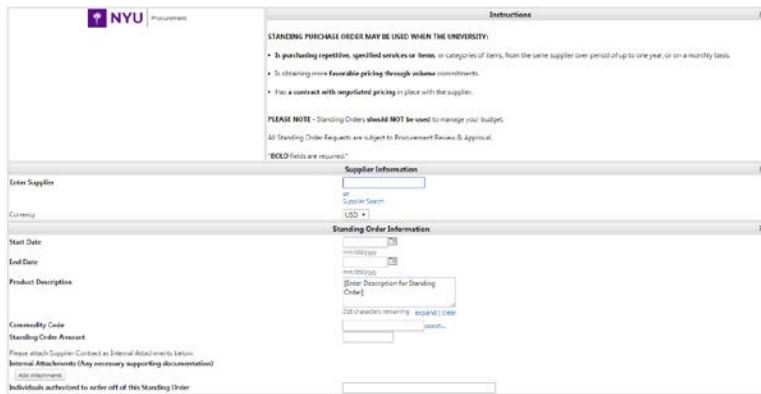
- Is purchasing **repetitive, specified services or items**, or categories of items, from the same supplier over a period of up to one year, or on a monthly basis
- Is obtaining **more favorable pricing** through volume commitments
- Has a **contract with negotiated pricing** in place with the supplier
- Standing Orders should **NOT be used to manage your budget**
- All Standing Order Requests are **subject to Procurement Review & Approval**

## LET'S GET STARTED

1. Login to i-Buy NYU via the Work tab of **NYUHome** using your Net ID and Password.
2. From the i-Buy NYU home page, click the **Standing Order Form** located in the Order Forms section.

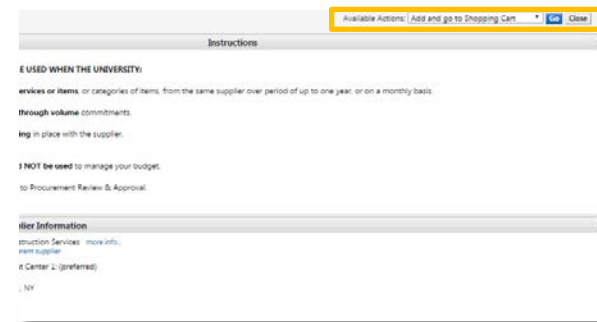


3. You will then be redirected to the Standing Order Form. Similar to all i-Buy NYU forms, required fields are shown in **bold**.

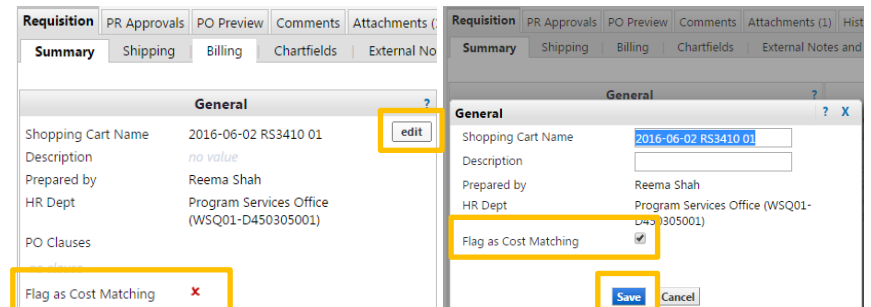


4. **Select your Supplier.** The supplier field does a real time name search of all active suppliers, including dba or company aliases. Refer to the New Supplier Requests/Supplier Update Tip Sheet for more information.
5. Enter the **Start Date** and **End Date**.

6. Enter a **brief description of the Standing Order services or items** to be purchased in the Product Description box. This Product Description will appear on the Purchase Order document that is distributed to the supplier.
7. Enter the **Standing Order Dollar Amount**.
8. Use **Internal Attachments** to attach support documentation (e.g. contract with negotiated pricing, price list, master agreement).
9. Enter the names and **net IDs for individuals** authorized to order off of this Standing Order.
10. Once all required fields have been entered, select **Add and Go to Shopping Cart** in the available actions menu and click **Go**.



11. The Standing Order form has been deposited in your cart as a line item. The form is available for review by any reviewer of the cart, requisition or resulting purchase order. **IMPORTANT NOTE:** Ensure the “Flag as Cost Matching” Option is checked by navigating to the shopping cart > View Draft > Requisition tab > Summary tab (refer to the general tab):

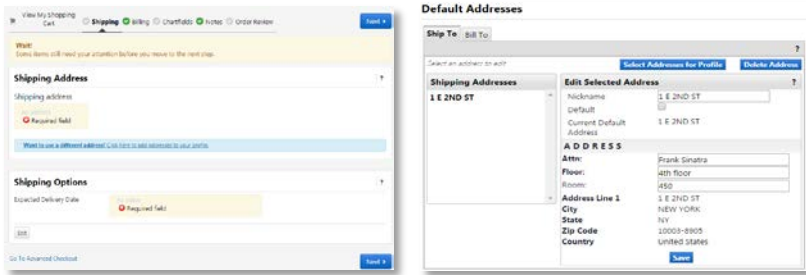


12. Continue with the standard checkout process to complete your standing order request.

## CHECKOUT PROCESS

1. For your first checkout, you will be prompted to add a shipping address to your profile. Click **Want to use a different address? Click here to add addresses to your profile**, then click **Select Address for Profile**, and search the directory using the building name or street number.

2. Add **Floor** and **Room**, and click **Save** to save this address as your default preferred address (you can change the address as needed).

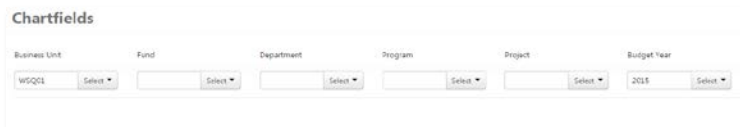


3. Go back to the checkout screen by clicking **the cart icon** at the top right, and then click **Checkout**.

4. The **Expected Delivery Date** field allows you to enter a target delivery date.

5. **Billing Information** is defaulted to NYU Accounts Payable.

6. Click **Edit** to enter **Chartfield Values**: Fund, Department, Program, Project, Budget Year. If unknown, click **Select** to pick from a list of all NYU Chartfield values. When the requisition is submitted, the chartfield values you provided will be validated against FAME.

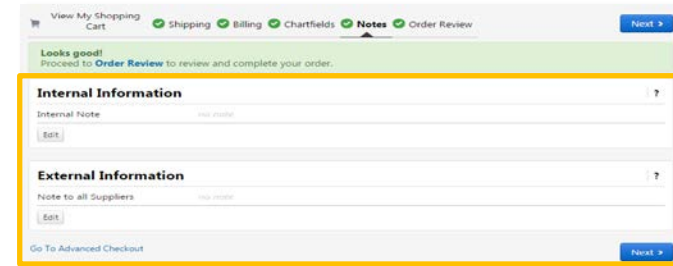


\*see i-Buy09 – Splitting a Chartfield for split distributions\*

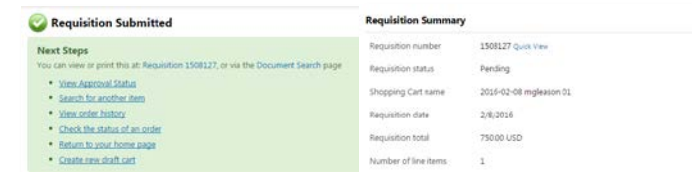
7.

7. In the notes section, use **Internal Information** to send specific notes to future reviewers (Department Approvers, Procurement, Accounts Payable).

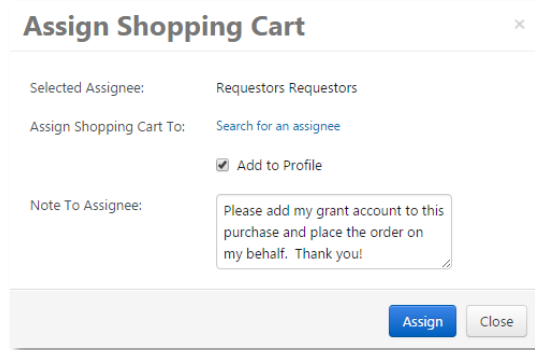
8. Use **External Information** to send notes to the Supplier as part of the purchase order. After adding any notes, **Save Changes**, and click **Next** to proceed to the final step.



9. Review your order for any missing steps, then select Place Order. You will see a confirmation screen that provides a requisition number.



## ASSIGNING A SHOPPING CART



The screenshot shows a dialog box titled "Assign Shopping Cart" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Selected Assignee:** Requestors Requestors
- Assign Shopping Cart To:** Search for an assignee
- Add to Profile
- Note To Assignee:** A text area containing the text: "Please add my grant account to this purchase and place the order on my behalf. Thank you!"

At the bottom of the dialog are two buttons: "Assign" (highlighted in blue) and "Close".

- ▶ **Shoppers** cannot submit draft carts for approval, and must assign their cart to a known Department Requestor to get the relevant chartfield accounting information
- ▶ **The Department Requestor** can edit or fill out the relevant chartfield accounting information, and consolidate carts from multiple shoppers into one order
- ▶ Click **Assign Shopping Cart** to search the NYU directory for your Requestor, and add them to your profile for the future
- ▶ You can **include a note** to the assignee (Requestor) which will be sent to their email address