Placing Orders

All office supplies, research supplies and equipment orders are placed through the Department Assistant, Rochelle Stephens (rxb89) who also is the Procurement Clerk for the Chemical Engineering, Macromolecular Science and Engineering, and Materials Science and Engineering Departments (including cost centers).

**Procedures for submitting Purchase Request forms**

If you don’t have an electronic copy of a purchase request form, please email Department Assistant to have purchase request form sent to you. ALL purchase request forms are to be submitted via email for processing with the approval of PI and/or supervisor.

- Please complete internal purchase request form and provide all information applicable to vendor (name, phone, website, etc). All product information (catalog number, description, and price) is needed to place order. If you want to provide any specifications on how orders should be handled, please complete the “special instructions” field on purchase request form.

- If this is a rush order, please indicate the date order is needed in the “ship to arrive” field on purchase request form. Please do not use “Rush.” **Due to the volume of orders processed, rush orders can be done but not on a routine basis.**

- When purchase request form has been completed, please email as an attachment to Rochelle Stephens, (rxb89). Charges against the administrative account being used will be reviewed for approval. **Department Assistant will proceed with placing order.** At this time, an internal PO number will be assigned to your purchase request form. Your order is now ready to be placed!

- Department Assistant will determine the best method (phone, fax, or website) to place order directly with vendor based on information that has been provided on purchase request form. Will also determine if order is eligible to charge against Pcard or if requisition has to be created for submission through the ERP Financial system. **Charges against Pcard cannot exceed $5000.** All order confirmations received via email will be forwarded to the requestor.

  **Please allow 3 to 5 business days for normal priority order to be placed and received.**

**Major Equipment Orders and Service Agreements**

A quote from the vendor is required for major equipment/service agreements over $5000. Any orders exceeding $10,000 require competitive quotes or a single source justification form. Service Agreements do not require a competitive quote but must be accompanied by a single source justification form. These forms and any other documentation that support the order should be submitted along with the Purchase Request Form.

**SmartCART Orders**

SmartCART is a software tool in ERP Financials that consolidates the ordering process. The systems have various vendors to purchase items. The Punch-out catalogs are those that go directly to the company website and allow a user to purchase items online and then pull that information back into the SmartCART system and ultimately create a requisition in the Financials system.
The following vendors currently are participants:

- AIRGAS
- BD
- BIO-RAD
- CDW-G
- DELL
- FISHER SCIENTIFIC
- IDT
- GRAINGER
- MCMASTER-CARRR
- SIGMA ALDRICH
- STAPLES

The process with SmartCART can be streamlined even further with giving the end user the option to sign up as “A window shopper” which is a Case Employee who does not have access to the ERP Financials system, but currently orders from a vendor that is a part of SmartCART. End users can register at: [http://campusservices.case.edu/PDSHome.aspx](http://campusservices.case.edu/PDSHome.aspx)

Items should be procured from the authorized vendor sites for Staples and Dell. For example, Dell orders should be procured through PremierDell.com NOT Dell.com. The Equote# generated should be enclosed with the Purchase Request form that is submitted. End users should also include exact email address the Equote has been saved under.

**What should I do if I do not receive my order?**

If your order is not received in a timely fashion (this depends on what you have ordered), please email copy of purchase request form to Department Assistant. Please type “Status of order request” in subject line of email. Here is what will happen:

- Department Assistant will respond within 24 hours to requestor’s inquiry and will provide the date the order was placed as well as when order is scheduled to arrive. Department Assistant may only be able to provide an approximate date of delivery for some orders.

- If further information is needed, Department Assistant will provide requestor with reference number(s) to contact vendor directly. Department Assistant will follow up directly with a buyer from Procurement and Distribution services for major equipment orders.

**Payment of Invoices**

Please submit invoice along with speedtype and account number to be charged to Department Assistant for approval of payment. A requisition will be created by Department Assistant for invoices through ERP Financials. No purchase request form is necessary to accompany this request.

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