



Placing a Standard Order

What an LC needs to do to place a standard order on Procurify, and suggestions for making the process easier

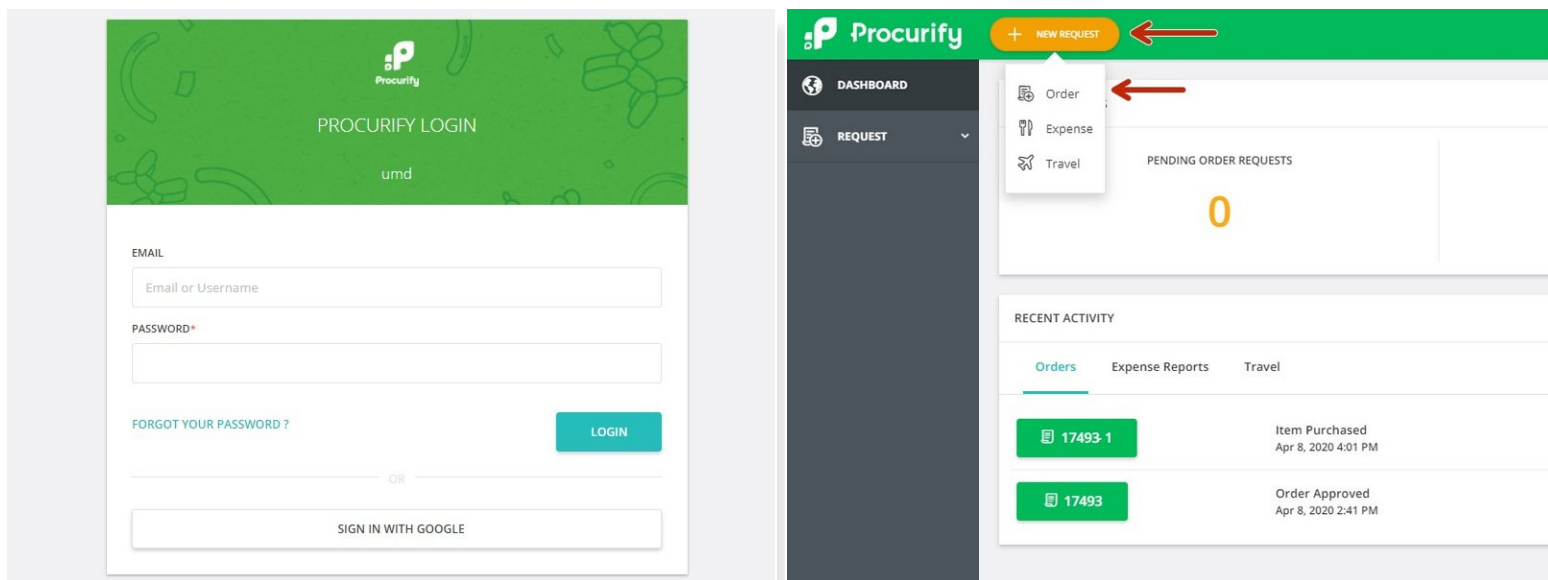
Written By: Anthony Joseph Stair



Introduction

This guide will walk you through the basic steps for placing a Procurify order. Before continuing you should have already have setup your Procurify account and completed to best practices dozuki.

Step 1 — Open Procurify



- Navigate to <https://engr.procurify.com/>
- Login with username and password
- Click "NEW REQUEST" and then "Order"

Step 2 — Order Request

The screenshot displays the 'Order Request' form, divided into three main sections:

- ORDER DETAILS:** Includes a 'LOCATION' dropdown (set to 'Clark School of Engineering') and a 'DEPARTMENT' dropdown (set to 'Research Prototyping Lab'). A red arrow points from the location to the department. Below these is an 'ORDER DESCRIPTION' text area with a placeholder 'Order Description'. At the bottom of this section is a button '+ IMPORT ORDER ITEMS'.
- Cost and Approver:** Shows 'Total Estimated Cost: 0.00 USD'. Below this is a 'NEXT APPROVER' dropdown menu, currently showing 'Nathanael Carriere (level 1)' with the subtext 'ORDER - Clark School of Engineering - Research Prototyping Lab'. At the bottom of this section are 'RESET FORM' and 'SUBMIT REQUEST' buttons.
- Order Items List:** A table with columns: ITEM, VENDOR, PROJECT/UNIT, and QUANTITY. Below the table header is a '+ ADD NEW ITEM' link with a black arrow pointing to it.

- Select the department (lab) you are ordering for
- Fill out a description of the order
- Select proper approver for the space
- ⚠ **DO NOT** select Rick as next approver unless specifically instructed to do so
- Select "+ Add New Item" to bring up the form to order an item

Step 3 — Add New Item to Order

The image displays three sequential screenshots of the Procurefy 'Add New Item to Order' form, illustrating the autofill process. In the first screenshot, the 'PRODUCT NAME*' field is highlighted with a black box, containing the URL 'https://www.amazon.com/AmazonBasics-WT352G-Lightweight-Mini-Tripod/'. The 'ACCOUNT CODE*' field shows a suggestion for '01-2-953670 - TERRAPIN WORKS'. The 'PREFERRED VENDOR*' field is set to 'Other', and the 'VENDOR NAME*' field is empty. The second screenshot shows the autofill results: 'PRODUCT NAME*' is 'AmazonBasics Lightweight Mini Tripod', 'ACCOUNT CODE*' is '01-2-953670 - TERRAPIN WORKS', 'PREFERRED VENDOR*' is 'Amazon.com Inc' (highlighted with a red box), 'VENDOR NAME*' is 'Amazon.com Inc', 'SKU' is '1-Pack' (highlighted with a blue box), and 'HOW MANY DO YOU NEED?' shows 'QUANTITY*' as 1, 'UNIT TYPE*' as 'each', 'ESTIMATED PRICE*' as 9.99, and 'CURRENCY*' as USD. The third screenshot shows the final state where the 'VENDOR NAME*' field has disappeared, leaving only the 'PREFERRED VENDOR*' field.

- For online purchases: paste link into the "Product Name" Field and Procurify will try to autofill all of the fields
- ⚠ The autofill will likely miss or botch some data, always double check what was filled in
- Input the vendor name in the "Preferred Vendor" box
 - ⚠ Check the vendor list to see if the vendor already exists. Do not add an existing vendor
 - ℹ If "Preferred Vendor" is correct, then the "Vendor Name" box will dissapear
- "SKU" is also incorrect
 - ⚠ Do not input anything if you are not 100% it is an SKU number, i.e. no product numbers or other identifications

Step 4

The screenshot shows a multi-column form for placing a standard order. Key fields and their highlighted states are as follows:

- ACCOUNT CODE***: A dropdown menu with a blue box around it. The suggestion "01-2-953670 - TERRAPIN WORKS" is visible.
- QUANTITY***: A text input field containing "1", highlighted with a red box.
- UNIT TYPE***: A dropdown menu set to "each".
- ESTIMATED PRICE***: A text input field containing "9.99", highlighted with an orange box.
- PROJECT/UNIT***: A text input field containing "Project/Unit", highlighted with a yellow box.
- COMMENTS**: A text area containing a long Amazon product URL, highlighted with a green box.
- UPLOAD**: A button for uploading files, highlighted with a pink box.
- ADD ORDER ITEM**: A button at the bottom right, highlighted with a teal box.

- The Terrapin Works "Account Code" should be suggested under the input box
- ❗ Sometimes the account code will be EIT Operations, and that is ok as long as the number is 01-2-953670
- Input the number of units you want in the "Quantity" box
- Check the unit price in "Estimated Price", or input it if it was not autofilled
- Input your lab abbreviation (MIC, AFL, etc.) into the "Project/Unit" box
- Input links to products in the "Comments" section if not autofilled, shorten the links to remove unnecessary information (ALWAYS test to make sure they work!)
- Any additional documents, such as quotes, should be uploaded
- When all necessary information is inputted, click "Add Order Item"

Step 5 — (Optional) Add from Item History

The first screenshot shows the 'Item History' button being clicked. The second screenshot shows the 'Item History' search results for 'Argon'. The third screenshot shows the 'New Item Description' form with the 'Argon' item added.

- Click "Item History" and search for something you have ordered previously
- Select the item you need
- ⚠ Check that all information is still correct when reordering.
- Click "ADD ORDER ITEM"

Step 6 — Review and Submit

The screenshot shows the 'Review and Submit' page. It includes a success message, a table of items, and a 'SUMMIT REQUEST' button.

VENDOR	PROJECT/UNIT	QUANTITY	UNIT	UNIT COST	LINE COST
Amazon.com Inc	RPL	1	each	22.99 USD	22.99 USD
Airgas	RPL	1	each	243.09 USD	243.09 USD

Total Estimated Cost: 266.08 USD

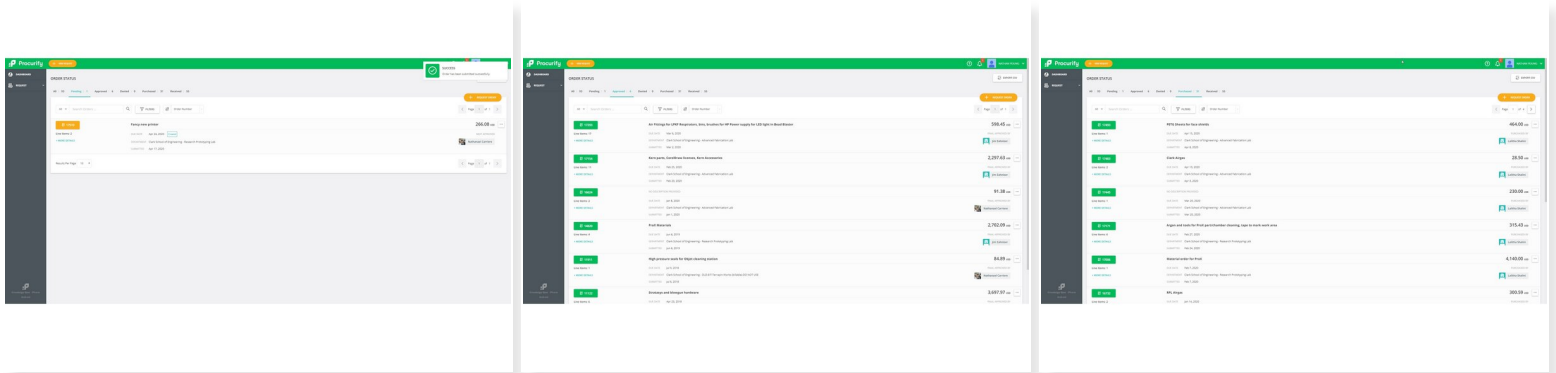
Next Approver: Nathaniel Carriere (Level 1)

SUMMIT REQUEST

- ⚠ Review all of the order information one last time including **price** and **quantity**

- Click "SUMMIT REQUEST"

Step 7 — Next Steps



- Once the order is submitted it will need to be approved by your supervisor as well as Jim Zahniser for larger orders
- You can see the status of your orders in the tabs along the top
- Once your item is received you will get an email to pick it up