



Placing a Standard Order

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

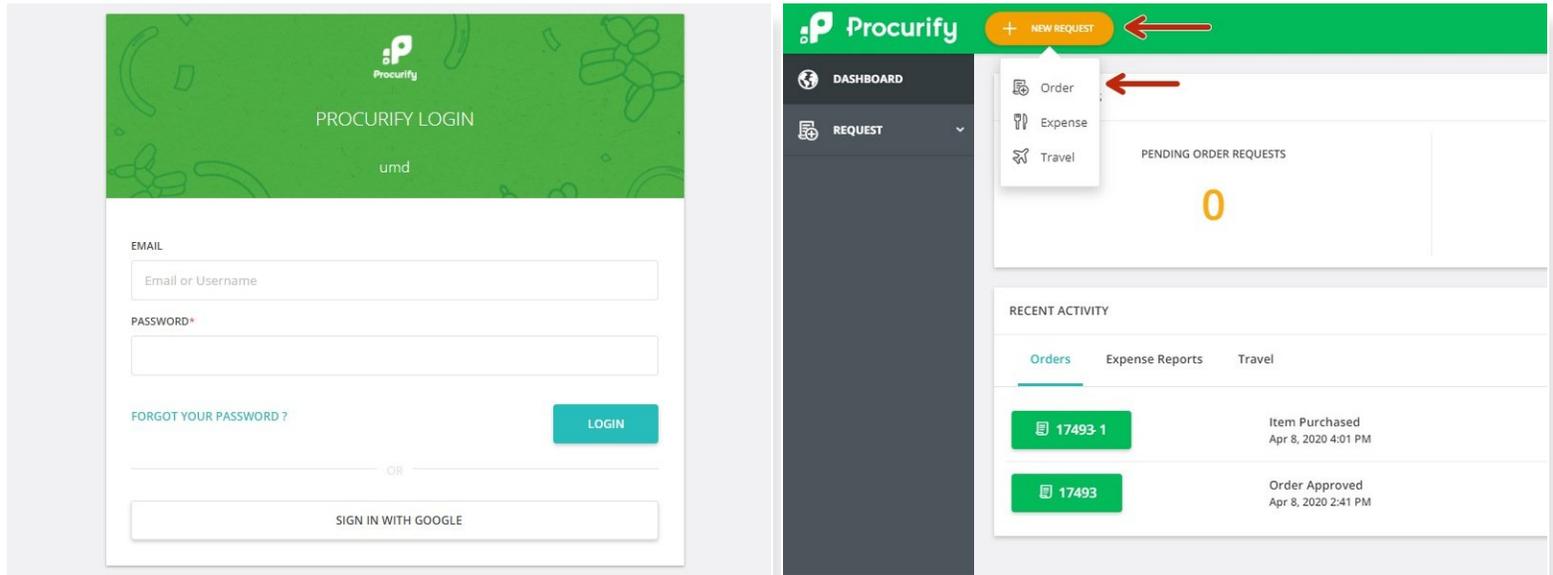
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Introduction

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. The 'ORDER DETAILS' section includes a 'LOCATION' dropdown set to 'Clark School of Engineering' and a 'DEPARTMENT' dropdown set to 'Research Prototyping Lab'. An orange box highlights the 'ORDER DESCRIPTION' field, and a red arrow points from the 'LOCATION' dropdown to the 'DEPARTMENT' dropdown. The 'NEXT APPROVER' dropdown is highlighted with a yellow box, showing 'Nathanael Carriere (level 1)'. The 'Total Estimated Cost' is 0.00 USD. The 'Order Items List' table is empty, with a '+ ADD NEW ITEM' button highlighted by a black arrow. At the bottom, there are buttons for 'IMPORT ORDER ITEMS', 'RESET FORM', and 'SUBMIT REQUEST'.

ITEM	VENDOR	PROJECT/UNIT	QUANTITY
+ ADD NEW ITEM			

- 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 a procurement system's 'Add New Item to Order' form. In the first screenshot, the 'PRODUCT NAME*' field is highlighted with a black box and contains the URL 'https://www.amazon.com/AmazonBasics-WT1352G-Lightweight-Mini-Tripod/'. The second screenshot shows the 'ACCOUNT CODE*' field with a dropdown menu displaying a suggestion '01-2-953670 - TERRAPIN WORKS'. Below it, the 'PREFERRED VENDOR*' field is set to 'Other', and the 'VENDOR NAME*' field is empty. The third screenshot shows the 'PREFERRED VENDOR*' field set to 'Amazon.com Inc', the 'SKU' field set to '1-Pack', and the 'HOW MANY DO YOU NEED?' section with '1' quantity, 'each' unit type, '9.99' estimated price, and 'USD' currency.

- 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

ℹ️ If "Preferred Vendor" is correct, then the "Vendor Name" box will disappear

- "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

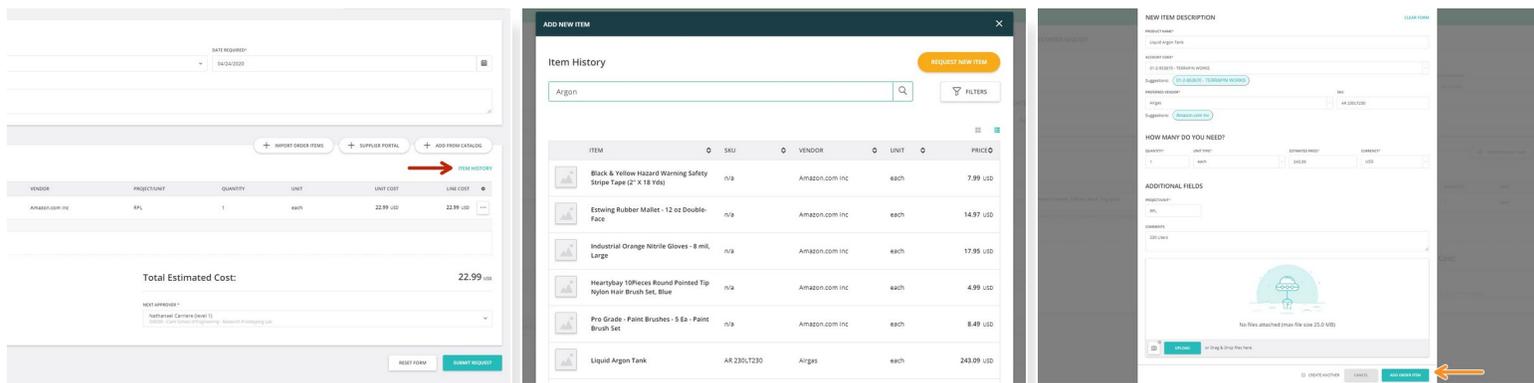
Step 4

The screenshot shows a web form for placing a standard order. The form is divided into several sections:

- ACCOUNT CODE*:** A dropdown menu with a suggestion of "01-2-953670 - TERRAPIN WORKS".
- PREFERRED VENDOR*:** A dropdown menu with "Other" selected.
- VENDOR NAME*:** A text input field.
- SKU:** A dropdown menu with "1-Pack" selected.
- HOW MANY DO YOU NEED?:** A section containing:
 - QUANTITY*:** A text input field with "1" entered.
 - UNIT TYPE*:** A dropdown menu with "each" selected.
 - ESTIMATED PRICE*:** A text input field with "9.99" entered.
- ADDITIONAL FIELDS:** A section with a **PROJECT/UNIT*** text input field containing "Project/Unit".
- COMMENTS:** A section with a text area containing a URL: <https://www.amazon.com/AmazonBasics-WT0352G-Lightweight-Mini-Tripod/dp/B00M78G2VQ>. Below the text area is an **UPLOAD** button and a note: "No files attached (max file size 25.0 MB)".

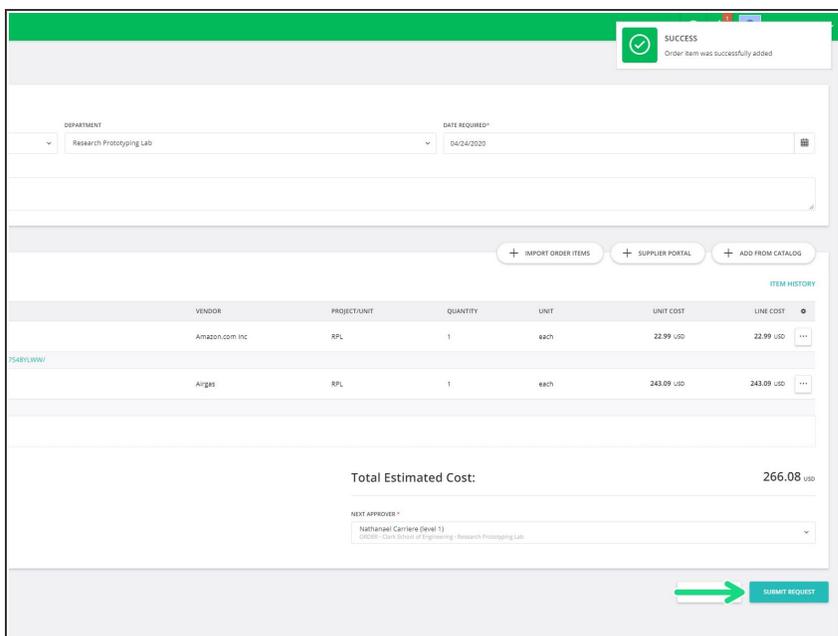
- The Terrapin Works "Account Code" should be suggested under the input box
-  Sometimes the account code will be EIT Operations, and that is ok as long as the number is 01-2-953670
- Input the number of units you want in the "Quantity" box
- Check the unit price in "Estimated Price", or input it if 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



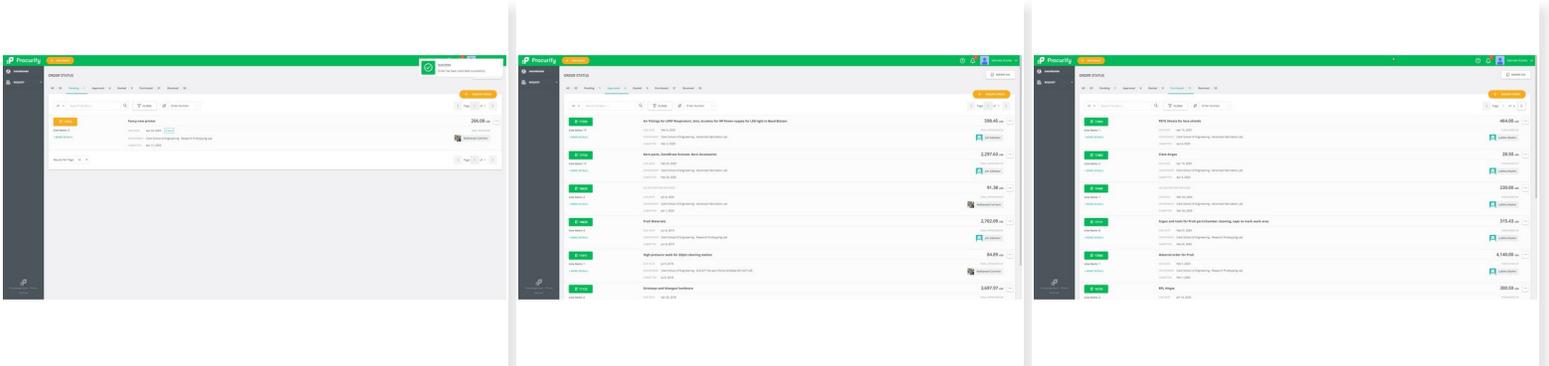
- Click "Item History" and search for something you have ordered previously
- Select the item you need
- ⚠️ Check that all information is still correct when reordering.
- Click "ADD ORDER ITEM"

Step 6 — Review and Submit



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