

# CSFPF Purchase Requisition Guide

The article covers how authorized requestors can create a new purchase requisition with their Foundation accounts. To determine which expenses are payable via a requisition, refer to the CSFPF Purchasing Matrix.

**!** If you are making changes to an approved purchase order, refer to the [Change Order Guide](#).

**1. Click on the CSFPF ServiceNow Requisition Request located on the CSFPF website.**

**2. Complete the Requisition Request by ensuring the following information is provided:**

## REQUEST TYPES AND DETAILS

The requestor information should automatically populate based on your login information.

Click on **New** request type for new requisitions. Check the following optional boxes if your requisition:

- Requires a deposit. A deposit amount is required once checked

### Request type and details

\* Request type

Change

New

Deposit required

## VENDOR INFORMATION

Provide the following vendor information below (required):

- Vendor/Payee Name
- Mailing Address
- Vendor Email

### Vendor Information

\*Vendor/Payee name

Create a Party Rental

\*Vendor email

sales@createaparty.com 

\* Mailing address


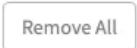
Create A Party Rentals  
428 Berry Way  
Brea, CA 92821

Payee is an employee of the CSU system or its auxiliaries.

## GOODS OR SERVICES

Click **Add** to add a new requisition line for this purchase.

\* Goods and Services

					
Actions	Invoice number	Description/Justification	Account number	Object Code (CSFPF use)	Amount
No data to display					

Complete each requisition line (description/justification, account number, and amount) and save. If additional lines are needed, click the add button again to input additional information.

Edit Row ✕

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Invoice number

\*Description/Justification

\*Account number

Object Code (CSFPF use)

\*Amount

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Ensure that the **total** amount of all line items match your quote. The total amount should include the cost of goods/services and and other applicable fees (sales tax, delivery, etc.)



Please see the additional requirements for when your expenses exceed a certain threshold.

▼ Requirements

- Purchases of goods or services with a total value less than \$50,000 require at least one quote or an estimated price.
- Purchases of goods or services with a total value equal to or greater than \$50,000 but equal to or less than \$100,000 will require three or more information quotes from different vendors in writing. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services greater than \$100,000 will require a Formal Bid (Request for Proposal: RFP) through CSUF's Contracts & Procurement Department. Contact CSFPF for further instructions.
- Purchases of Information Technology (such as computers and software subscriptions) totaling greater than \$50,000 but equal to or less than \$500,000, three or more written quotes from different vendors are required. You will be prompted to upload a single PDF file of the additional quotes.
- Purchases of goods or services from a sole source/brand require CSUF Contracts & Procurement Authorization and approved written justification.

For additional comments, include them in the ***Special Instructions*** field (ex: including additional contacts in email communications).

**COMPLIANCE REVIEW**

Answer the compliance review questions. Depending on your answer, you may be required to upload additional documents (IT approval, D11 approval, or vendor insurance)

- **IT Purchases:** All IT-related purchases must include an IT Authorization Number, which must be obtained in advance and submitted with the request.
- **Hospitality Expenses:** For expenses subject to CSUF Directive 11, a completed Hospitality Justification Form (D-11) is required.
- **On-Campus Approved Vendor:** If the vendor will be on campus and is an approved CSUF vendor, the most recent Approved Caterers List from e-Business should be attached.
- **On-Campus Not approved Vendor:** If a vendor is scheduled to be on campus and is not included on the approved CSUF vendor list, a valid Certificate of Insurance must be submitted. The coverage must comply with CSU insurance requirements and standards.

### 3. Upload supporting documentation, which may include but is not limited to valid quote, unsigned contract/agreement, and any other documentation

Attach documents in a single PDF file, which may include but are not limited to valid quote, unsigned contract/agreement and any other supporting documentation. Refer to requisition checklist on CSFPF website.

### 4. Select the appropriate approver of the account being charged.



Not sure who the appropriate approver signer is? You can view a list of signers with our [Acct Info Foundation Report](#). Add your CSFPF account number in the **GL Key/Project** field and submit for a report of account signers. The requestor cannot also be the approver.

Purchase requisitions exceeding \$3,000 will require a second approver.

### 5. Read and check the attestation box prior to clicking on the submit button.

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## Next Steps

Once the requisition request has been submitted, the requester will receive a confirmation email referencing a unique RITM number. A separate email will be sent to the authorized approver requesting their approval.

CSFPF generally requires a minimum lead-time of 15 business days to process a complete Requisition Request. However, contracts for large amounts or requiring additional approvals from other campus units (i.e., IT, C&P, etc.) may require up to 25 business days for review and approval.

Received a requisition approval from CSFPF? Refer to the [Purchase Order Payment Guide](#).

## **Need Help?**

Additional information regarding the procurement process, please reference the CSFPF Procurement Policy on the Philanthropic Foundation website:

<http://foundation.fullerton.edu/policies-forms/>

If you have any questions, please contact the Foundation at [CSFPFAP@fullerton.edu](mailto:CSFPFAP@fullerton.edu) or 657-278-2786