INSTRUCTIONS ON COMPLETING THE

PURCHASE ORDER REQUEST FORM

For a brief summary on University Policy and Regulations pertaining to Purchase Orders, see:
http://www.bsrvm.berkeley.edu/procure/purguide/nutbolt.html

This form should be used for ordering items to be charged directly to a university account. Please note that the university has restrictions and regulations pertaining to purchased items. For instance, all items over $2,500 in cost (including all taxes, shipping & handling, etc.) cannot be ordered directly by the BSO, but must go through the campus' Procurement Office. All equipment valued at over $5,000 is considered inventorial. As good practice, it is advisable to determine the allowability of any purchase prior to completing this form. If you have any questions, please contact your budget assistant (for a list of BSO Budget Assistants, click here).

In order for the BSO to process this form, you must first check with the vendor to ensure that university purchase orders are acceptable. If the vendor does not accept university purchase orders, either another vendor will need to be used, or the item will need to be purchased by an individual for later reimbursement (note: the total cost of the item—including taxes, etc.—will need to be less than $2,500). Contact your budget assistant if you have any questions.

Requestor Name: Enter the name of the individual requesting the ordered item(s).

Requestor Phone: Enter the phone number of the individual requesting the ordered item(s).

Requestor E-mail: Enter the e-mail address of the individual requesting the ordered item(s).

Request Date: Enter today's date.

Requested Due Date: Enter the date when the item(s) should arrive. Note that this is ***not*** a guarantee the item(s) will arrive on or by the requested date.

Preferred Method of Shipment: E.g., UPS Ground, FedEx Overnight, etc. If no preference, write "None."

Final Destination (if equipment): If equipment is being ordered, provide the location where it will be kept (e.g., 1615 Tolman Hall, etc.).

Requested Vendor: Provide the name of the vendor.

Salesperson: Provide the name of the salesperson with whom the requestor was in communication. This information enables the BSO to contact the vendor if there are any questions.

Vendor Phone: Provide the phone number of the vendor, including the extension, if available, of the salesperson or contact person.

Vendor Fax: Provide the fax number of the vendor. This is important because the BSO often has to fax purchase orders to the vendor for the order to be processed.

Vendor E-mail: Provide the e-mail address of the vendor.

Payment Address: Provide the address where the payment should ultimately be sent. Also indicate whether payment should be made to a specific individual's attention.

Business Purpose of Item(s) to be Purchased: Provide a brief statement on the business purpose of the item(s) requested for purchase.

In the table, provide the information requested: **description of item(s)**, **item/stock #**, **quantity**, and **unit cost**. The total cost of each item will be calculated automatically. If the **shipping and handling** cost is known, enter that figure in the field provided. The subtotal and grand total (including an 8.75% sales tax) will be calculated automatically.

Any supporting documentation, such as vendor quotes or preliminary orders, should be attached to the form. These will aid the BSO in placing your order with less delay.

Account Name/Fund Source: Provide the account name or funding source (e.g., Ford grant) to be charged.

Approval Signature: Have the principal investigator (PI) of the funding source sign in this field, authorizing the BSO to charge costs against this account. If the PI has designated another individual to sign approval on expenses for a particular account, that individual should sign in this field (note that the BSO must be informed in writing by the PI that another individual can sign for expenses).