Section

3

Quick Reference

Use this section as a brief overview of the purchasing system. Please refer to Section 2 of this Policy for more detailed instructions.

1. **Purchase Requisitions apply to discretionary purchases on behalf of the Conference in excess of $500.**
2. If you are requesting a check to be sent to a vendor from the Conference or you are requesting reimbursement for expenditures made on behalf of the Conference for which you personally paid or incurred the expense, e.g. travel, **you must submit a Check Request regardless of the amount**.
3. Log on to the Conference Server.
4. Double click on the **Shelby v5** icon on the desktop. Enter your user name and password.
5. From the **Dashboard**, choose the **Purchase Order** module and click on it.
6. Choose **New**. Click on the **Header** tab.
7. Enter the Vendor name.
8. Enter the type of document, **Purchase Order** or **Check Request**. Use Purchase Order if you want to purchase goods or services to be received in the future, i.e. the vendor will send an invoice when the goods are delivered or the services performed. Use a Check Request if the vendor will not submit an invoice or if you are requesting reimbursement, e.g. travel.
9. Choose the appropriate **Approval Path.**
10. Go to the **Detail** tab. Enter the detail for the items – **Project**, **Fund #, Dept #, Account # and Description**. Refer to the table on Page 7 of the Purchasing Policy for common Fund/Department/Account distributions.
11. Enter the **Quantity** to be ordered, the **Unit** (usually "Each"), and the **Unit Price**.
12. Go to the **Approvals** tab and if your name appears there, click on the Approved box.
13. Click OK.
14. Exit Shelby.