

Step-by-Step Guide

Completing the Multi-Purpose Form

- ▶ This guide demonstrates how to complete the **Multi-Purpose: Purchases from Off-Line Suppliers** form.
- ▶ The **Multi-Purpose** form is a multi-purpose form to be used in most cases in which you want to purchase a product or service that is not offered from a supplier that provides an OU catalog.
- ▶ Identify the goods/services that you wish to procure outside of **CrimsonCorner** via the supplier's website, catalog, order form, etc. Ensure that the order information is current.
- ▶ Select a supplier that will accept a Purchase Order or will direct bill.
- ▶ **Note: Even though a supplier may be in CrimsonCorner does not automatically mean that they will accept a Purchase Order or will direct bill. You will need to check with the supplier to ensure that they will accept your order through this method and that their fulfillment information in the system is valid.**

Accessing the Multi-Purpose Form

1. From **cc.ou.edu** login with your 4x4.
2. From the main navigation menu select **Shop » View Forms** from the **Go To** menu or select **Forms** from the main workspace under the searching bar.
3. Select the **Order Forms** folder from the left side of the screen.
4. Click on the form titled **Multi-Purpose: Purchases from Off-Line Suppliers**.
5. The form will pop up in a new window.

Less than \$5,000 – No Contract Involved

- ▶ **Complete the form using the instructions below when you have an order for goods/services that is \$5,000 or less and does not require a contract.**
1. **Enter Supplier:** Enter the supplier name. As you type, the supplier name should appear. Please ensure that the fulfillment address is correct. If it is

not, click **select different fulfillment center** to select an alternative location.

2. **Description:** Enter a detailed description of what you would like to purchase. To avoid any confusion with the order, copy the description down as the supplier has it listed.
3. **Catalog No., Manufacturer Name** and **Manufacturer Part No.:** While these fields are optional, you should enter the information if it is available to you. The more information that you can provide to the supplier, the less likely they are to have issues fulfilling your order.
4. **Quantity:** Enter in the quantity needed.
5. **Unit Price:** Enter in the unit price listed.
6. **Packaging (UOM):** This field will default to Each but choose from the dropdown menu the most appropriate unit of measure.
7. **Commodity Code:** Select the most appropriate commodity code from the dropdown list.
8. **Bid Request Only, Contract Involved** or **Over \$5,000 – Sole Source:** Do not select any of these boxes.
9. **Health and Safety:** Select the appropriate boxes if applicable to the goods/services you are ordering.
10. **Internal Attachments:** These are attachments that stay with your requisition and are visible to those in **CrimsonCorner** who can review your requisition. To add an internal attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
11. **External Attachments:** These are attachments that stay with your requisition, that are visible to those in **CrimsonCorner** who can review your requisition and that will be dispatched to the supplier with your Purchase

Order. To add an external attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.

12. *All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.*

Less than \$5,000 –Contract Involved

- ▶ **Complete the form using the instructions below when you have an order for goods/services that is under \$5,000 and does require a contract.**

1. **Enter Supplier:** Enter the supplier name. As you type, the supplier name should appear. Please ensure that the fulfillment address is correct. If it is not, click **select different fulfillment center** to select an alternative location.
2. **Description:** Enter a detailed description of what you would like to purchase. To avoid any confusion with the order, copy the description down as the supplier has it listed.
3. **Catalog No., Manufacturer Name and Manufacturer Part No.:** While these fields are optional, you should enter the information if it is available to you. The more information that you can provide to the supplier, the less likely they are to have issues fulfilling your order.
4. **Quantity:** Enter in the quantity needed.
5. **Unit Price:** Enter in the unit price listed.
6. **Packaging (UOM):** This field will default to Each but choose from the dropdown menu the most appropriate unit of measure.
7. **Commodity Code:** Select the most appropriate commodity code from the dropdown list.
8. **Bid Request Only, Contract Involved or Over \$5,000 – Sole Source:** Click the

Contract Involved box only. This will ensure that even though the requisition total is less than \$5,000 the requisition will be routed to the Purchasing Department so that the contract can be reviewed and signed.

9. **Health and Safety:** Select the appropriate boxes if applicable to the goods/services you are ordering.
10. **Internal Attachments:** These are attachments that stay with your requisition and are visible to those in CrimsonCorner who can review your requisition. To add an internal attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
11. **External Attachments:** These are attachments that stay with your requisition, that are visible to those in CrimsonCorner who can review your requisition and that will be dispatched to the supplier with your Purchase Order. To add an external attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
12. *All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.*

Bid Request Only

- ▶ **Complete the form using the instructions below when you need to order goods/services that will be over \$5,000 but the best supplier is unknown and you need the Purchasing Department to issue a solicitation or bid to find the best supplier offering the lowest price.**
1. **Enter Supplier:** If you are requesting that a solicitation or bid be issued, the supplier's name is unknown. Therefore you will want to select the

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Purchasing Department (**UNIV OF OK PURCHASING**) as a supplier.

2. **Description:** Enter as many details and specifications about the request as you can.
3. **Catalog No., Manufacturer Name** and **Manufacturer Part No.:** Leave these fields blank.
4. **Quantity:** Enter in the quantity needed.
5. **Unit Price:** Enter as estimated price. If you do not have an estimate, enter in \$1.00.
6. **Packaging (UOM):** This field will default to Each but choose from the dropdown menu the most appropriate unit of measure.
7. **Commodity Code:** Select the most appropriate commodity code from the dropdown list.
8. **Bid Request Only, Contract Involved** or **Over \$5,000 – Sole Source:** Click the **Bid Request Only** box.
9. **Health and Safety:** Select the appropriate boxes if applicable to the goods/services you are requesting.
10. **Internal Attachments:** These are attachments that stay with your requisition and are visible to those in CrimsonCorner who can review your requisition. To add an internal attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
11. **External Attachments:** Do not add any external attachments for this order as the appropriate supplier has not yet been selected.
12. *All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.*

Over \$5,000 - Sole Source

- ▶ **Complete the form using the instructions below when you need to order goods/services that will be over \$5,000 but the supplier you are selecting is the only supplier who can provide the goods/services. You will be required to provide justification explaining why this supplier is being selected.**
1. **Enter Supplier:** Enter the supplier name. As you type, the supplier name should appear. Please ensure that the fulfillment address is correct. If it is not, click **select different fulfillment center** to select an alternative location.
 2. **Description:** Enter a detailed description of what you would like to purchase. To avoid any confusion with the order, copy the description down as the supplier has it listed.
 3. **Catalog No., Manufacturer Name** and **Manufacturer Part No.:** While these fields are optional, you should enter the information if it is available to you. The more information that you can provide to the supplier, the less likely they are to have issues fulfilling your order.
 4. **Quantity:** Enter in the quantity needed.
 5. **Unit Price:** Enter in the unit price listed.
 6. **Packaging (UOM):** This field will default to Each but choose from the dropdown menu the most appropriate unit of measure.
 7. **Commodity Code:** Select the most appropriate commodity code from the dropdown list.
 8. **Bid Request Only, Contract Involved** or **Over \$5,000 – Sole Source:** Click the **Over \$5,000 – Sole Source** box.
 9. **Health and Safety:** Select the appropriate boxes if applicable to the goods/services you are ordering.
 10. **Internal Attachments:** These are attachments that stay with your requisition

and are visible to those in CrimsonCorner who can review your requisition.

In this section you can attach your sole source justification. To add an internal attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.

11. **External Attachments:** These are attachments that stay with your requisition, that are visible to those in CrimsonCorner who can review your requisition and that will be dispatched to the supplier with your Purchase Order. To add an external attachment, select **add attachment** and choose to attach a **File**. Type in a name for the file and select **Choose File**. Locate the electronic image and select it. Once the file name is displayed, click **Save**.
12. *All sensitive information (social security numbers, credit card numbers, protected information under HIPAA or FERPA, etc.) MUST be removed from attached documentation.*
13. **Additional Information/Sole Source Justification:** If you prefer to type the sole source justification in rather than attaching the sole source form as an internal attachment, use this section to enter the justification information.

Available Actions

- ▶ Once the form is complete, you will need to select the appropriate action from the dropdown list of Available Actions.
 - ▶ The Available Actions menu provides options when completing a form.
1. **Add and go to Cart:** This option adds the current form to your shopping cart and returns you to the shopping cart screen.
 2. **Add to Cart and Return:** This option adds the current form to your shopping cart. The form page displays with the previously selected supplier and all

other fields are reset to blank.

3. **Add to Cart:** This option adds the current form to your shopping cart. The form page remains completed. This option eliminates redundant data entry by using the existing form data as a template.
4. **Add to Draft Cart or Pending Req/PO:** This option adds the form to a draft cart instead of the active shopping cart.
5. **Add to Favorites:** This option will allow you to add this form to your Favorites. See **Creating and Using Favorites** for more information.