Online Requisitioning Procedures

The originator will need to log in to Mercury Commerce to create their requisition. This will be for a check request and purchase order request.

Check Request Requisition Process

1. The originator will log in to Mercury Commerce, the same as you would for creating a requisition for a purchase order.
2. Select the "easyPurchase" link on the left side
3. Select the "New Cart/Requisition" link on the upper right hand side of the next screen.
4. On the next page you will need to select the "Manual Item Entry" button.
5. This will take you to the Manual Requisition – Search, here you can search by one of the following criteria:
   a. Vendor Name
   b. Vendor Number

   IF you cannot find your vendor, please contact the Purchasing Manager at ext. 6703 or e-mail garrism@eastcentral.edu. If your vendor has not been added into Colleague/Datatel you may be asked to provide additional information for verification purposes. You will be notified when the vendor has been added into Mercury Commerce.
6. After you have successfully selected your vendor you will be directed to the Manual Requisition – Item Input page. Here you will put in the following information, which can be found on the invoice and/or order confirmation.
   a. Description
   b. Manufacturer's Name (if available)
   c. Vendor's Item Number (if available)
   d. Unit of Measure
   e. Price
   f. Quantity

   Continue to click on "Update-Add Line" until all of your line items have been entered included any shipping and handling costs. If you have insufficient information, your requisition may be rejected in the approval process. Please be diligent when putting in your information. Once you are done entering your line items click on "Submit" to continue to the next page.

7. You are now to the “Cart/Requisition Modify” page aka your online requisition form. Please fill in the following information:
    a. Cart/Requisition Name
    b. Ship To Location (Automatically defaulted to campus location)
    c. Approval Route
    d. Needed By Date (if necessary)
    e. Account Number (if a budget number is not in your list, contact Purchasing)
        i. Can be divided into multiple budgets by clicking on the blue plus sign. **Note this will be applied to all the line items. If you wish to divide only certain line items you will need to go that line item and click on the individual “account Code” blue plus sign.*
    f. Notes & Attachments
        i. Attach a pdf file of the invoice by clicking on the paperclip symbol.
        ii. External and Internal notes can be added by clicking on the pencil symbol.
    g. Update All Deliver To’s (Is automatically defaulted to originator’s name, can be updated to another person if necessary.)
    h. Click on the Confirmation Request (This is for CHECK REQUESTS ONLY)
8. Make sure everything is filled in and completed.
9. Click the “Save” button
10. Click the “Submit for Approval” button if requisition is complete.

Budget Approval:

1. If you have insufficient funds for the particular budget you have selected, your requisition will be returned before reaching the approval route. It is your responsibility to make sure you have sufficient funds in your budgets.
2. Insufficient Funds:
    a. Contact your approving supervisor to see about fund available, if necessary.
    b. Submit an e-mail to the Financial Services Coordinator for a budget transfer.
    c. Once your budget has enough funds available, you will need to click on the requisition and select “Retry All” and “Submit”.
3. Sufficient Funds:
    a. Your requisition will begin the approval process.

Approval Routes

1. Approval routes have been setup according to your departments hierarchy. Each route will follow this basic principle:
    a. Approving Supervisor
    b. Vice President of your division. Limits are setup according to their preference.
    c. Financial Services
    d. Comptroller
    e. VP, Finance & Administration if over $5,000

g. Purchasing Department

h. Accounts Payable

2. The requisition can be rejected at any point in the approval process for various reasons. The reason(s) are outlined on the requisition. It is your responsibility to fix the errors and resubmit.
3. You can track your requisition in the approval process by logging into your Mercury account and clicking on the particular requisition number.

Approved Requisition

1. Once your requisition has been approved, accounts payable will received it and a check will be cut to pay the vendor.