



## ***How To Create a Purchase Request***

- Log into the Nest ([Nest.cua.edu](https://Nest.cua.edu))
- Click on your organization page from the Explore page under My Memberships
- Click “Manage Organization” in the upper right corner of your organization page
- Access the Organization Menu by clicking the icon next to your organization’s name
- Click on the “Finance” in the Organization Menu
  - If you do not have access, contact an officer in your organization
- Click on the red button labeled “Create Purchase Request”
- Fill out the following information:
  - **Subject:** The reason you are buying something (ex. Tools for Service Project; Food for March 2017 Meeting; Bob Jones Reimbursement, etc.)
  - **Requested Amount:** How much money you would like to spend. For purchasing items, the amounts DOES NOT need to the exact amount, but you should aim to stay under the amount you estimate. (ex. \$40 for balloons)
  - **Description:** Why the items are being purchased (ex. power tools in order to help build furniture at service day; provide light snack for members at our upcoming meeting; Bob Jones gas reimbursement for driving to tournament). Feel free to include links here.
  - **Account:** This is the account you want to money to be spent from (NOTE: There must be money in the account for a Purchase Request to be approved.)
    - Choose “Operating Budget” if your purchase is an operating expense
    - If your event has a unique event account, choose that account
    - Do not use the TB Allocations account (this is just a parent holding account)
  - **Categories:** Select a corresponding category. If more than one, choose “Other.”
- **Payee Information:** This is the information of whoever needs to be paid. If it is an online retailer, like Amazon, you do not need to include the address. If someone is receiving a check, a permanent address is required (including for students receiving reimbursements).
- Are you requesting a Purchasing Card for pickup?

- If a P-Card is needed, list the date(s) that you need the P-Card. P-Card are given on a first-come first-served basis. Request a P-Card early to have the best chance of receiving one (especially over a weekend)
- If your purchase can be made online, you do not need to check-out a P-Card; someone in OCA will make the purchase for you online
- If online order request, include the link(s) to the item(s) requesting
  - DO NOT attach a link to a “cart” created. This link will show up as an empty cart.
  - You may request items from multiple vendors in one Purchase Request
  - Make sure to include all necessary information, including item numbers, quantities of each item, colors/styles, links, screenshots of a loaded cart, shipping preferences, etc.
- If a check is created (normally for contracts, invoices, and reimbursements; not for Purchasing Card Requests) what would you like done with it?
  - The two options here are “Mail to Vendor” and “Hold at Accounts Payable for pickup.” Some vendors (usually speakers or rental companies) would like to be handed a check on the day of the event in exchange for services. Others do not mind receiving the check via mail before or after the event takes place. Ask your vendor which they prefer before moving forward with a purchase request.
  - If this is for a reimbursement, “Hold at Accounts Payable for pickup” is usually the preferred method for students, coaches, or others affiliated with the university.
  - If you are paying someone via check, this usually also includes some kind of contract or performance agreement that must be attached to the Purchase Request. Visit [sorc.cua.edu/financeguide](http://sorc.cua.edu/financeguide) to learn more about contracts.
  - \*NOTE\* If you select “Mail to Vendor,” you MUST ensure the “Payee” address information is completed and correct – this is where the check will be sent.
- Additional Comments: Any other relevant information that would be helpful for OCA staff to know in approving and completing this request (e.g. deadlines for payment, deposits due, etc.)
- Click “Submit”
- Once OCA reviews your request, you will receive an email stating if the Purchase Request was approved or if additional information is needed.
  - “Approved” is different than “Complete.” Look at the Purchase Request comments box or contact our office if you have any concern.
  - “Approved” means that the Purchase Request has been reviewed and is in progress.
    - This means your pcard is available and reserved for the day you requested, your online orders are ordered and you will be notified when they arrive in OCA, or your reimbursement is approved and sent to Accounts Payable to issue a check.
  - “Completed” means that the purchases that go along with the Purchase Request have been put into the Nest as financial transactions.
- If you have any questions, email [cua-activities@cua.edu](mailto:cua-activities@cua.edu).