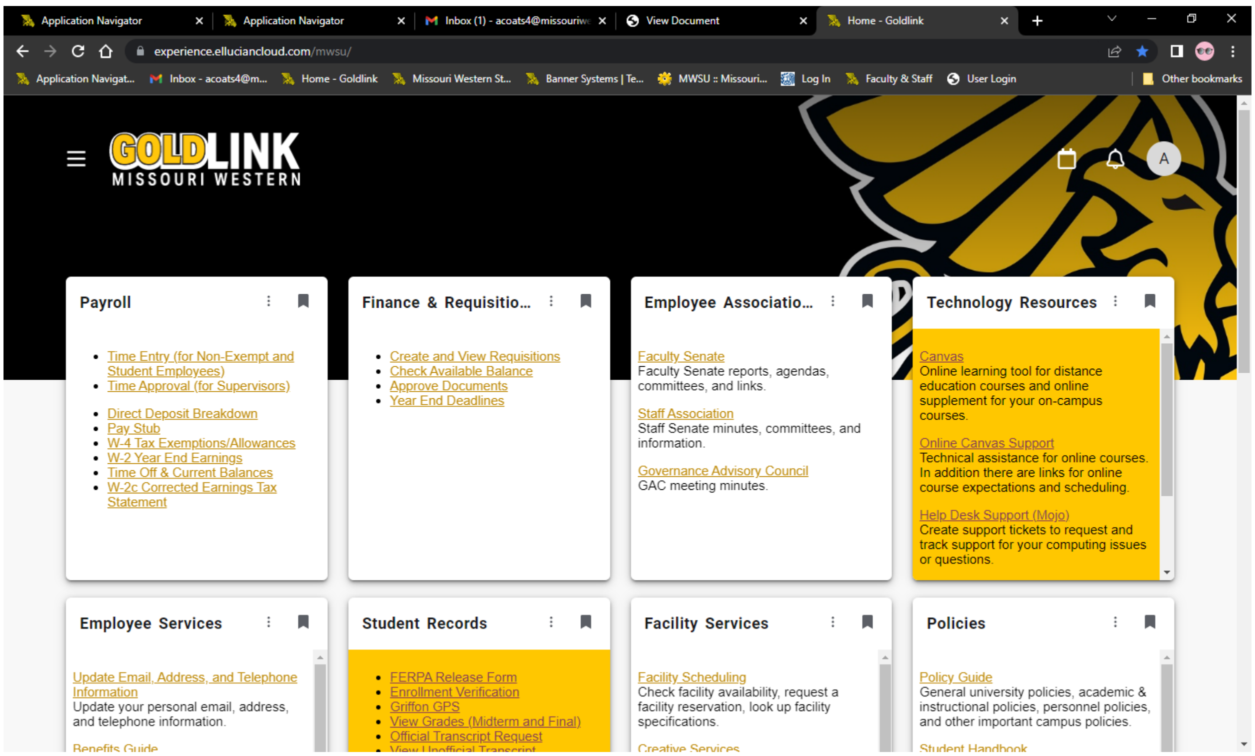
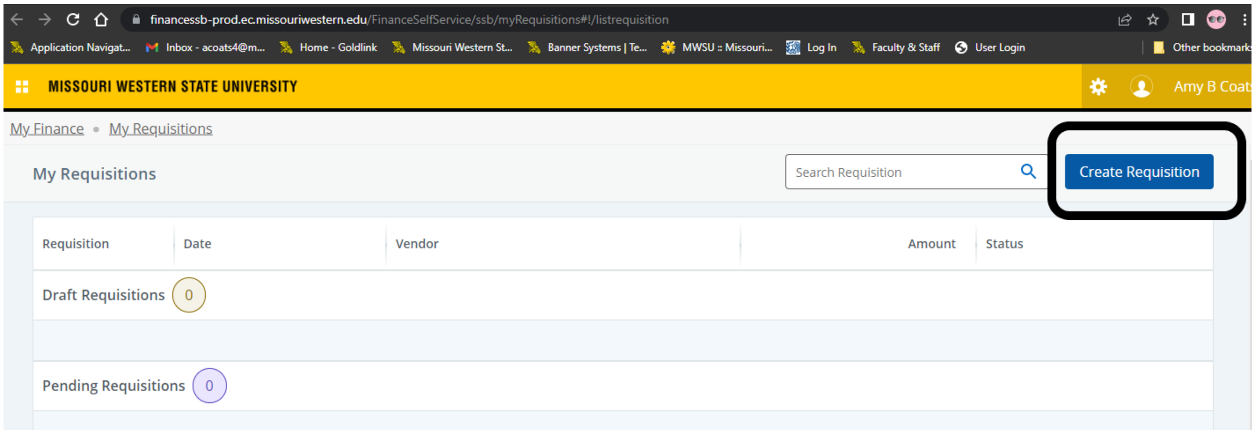
CREATE REQUISITION

Obtain a quote from your vendor. If over $3,000 *STOP* and refer to the [purchasing manual](#).
(If your purchase requires any form of printing a [print request](#) form should be filled out. Purchasing then obtains quotes.)
Review your budget and verify that you have enough funds to cover your purchase.

Login to Gold Link and click on Create & View Requisitions



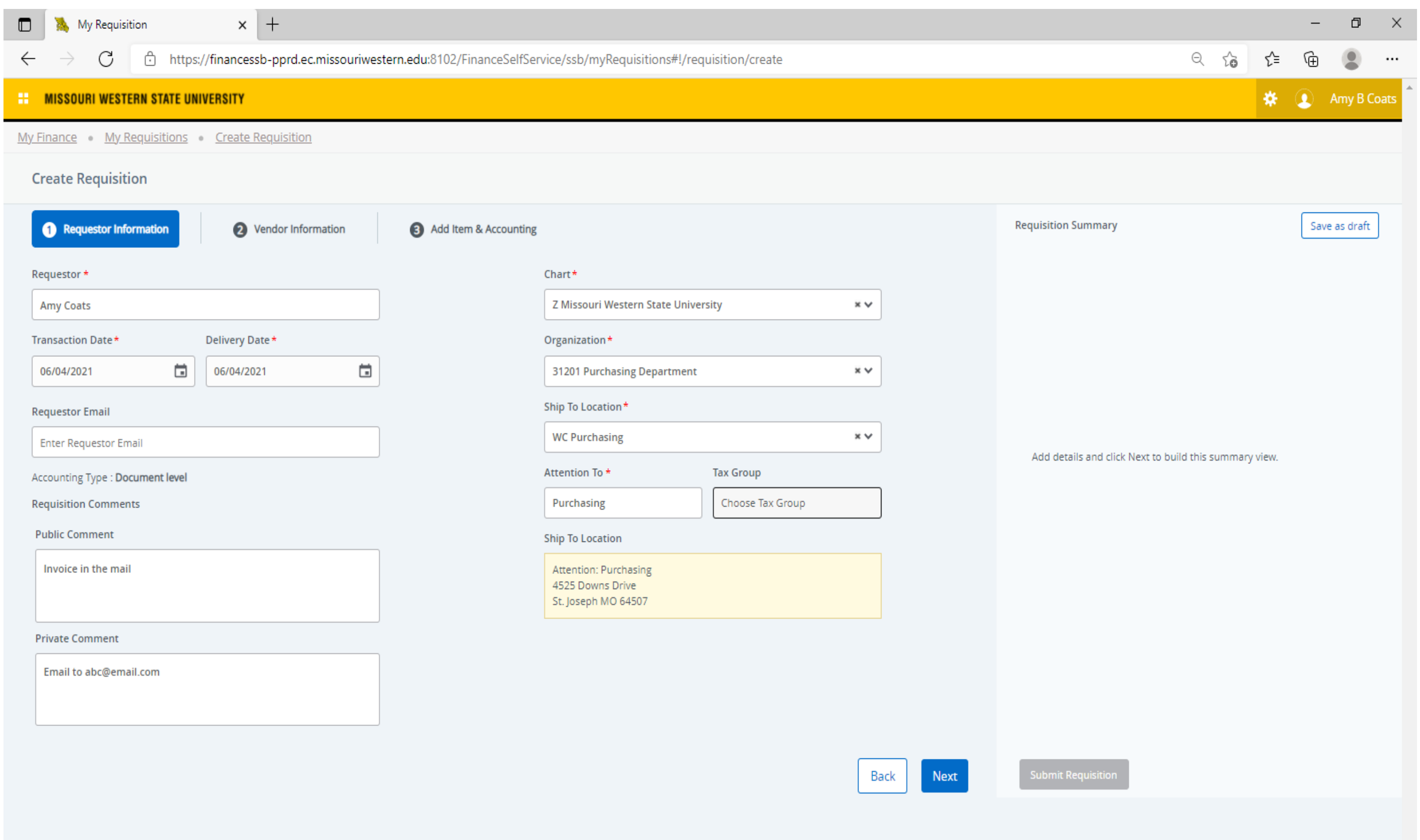
Click on Create Requisition


financessb-prod.ec.missouriwestern.edu/FinanceSelfService/ssb/myRequisitions#!/listrequisition
Application Navigat...
Inbox - acoats4@m...
Home - Goldlink
Missouri Western St...
Banner Systems | Te...
MWSU :: Missouri...
Log In
Faculty & Staff
User Login
Other bookmarks
MISSOURI WESTERN STATE UNIVERSITY
Amy B Coat
My Finance
My Requisitions
My Requisitions
Search Requisition
Create Requisition
Requisition
Date
Vendor
Amount
Status
Draft Requisitions
0
Pending Requisitions
0

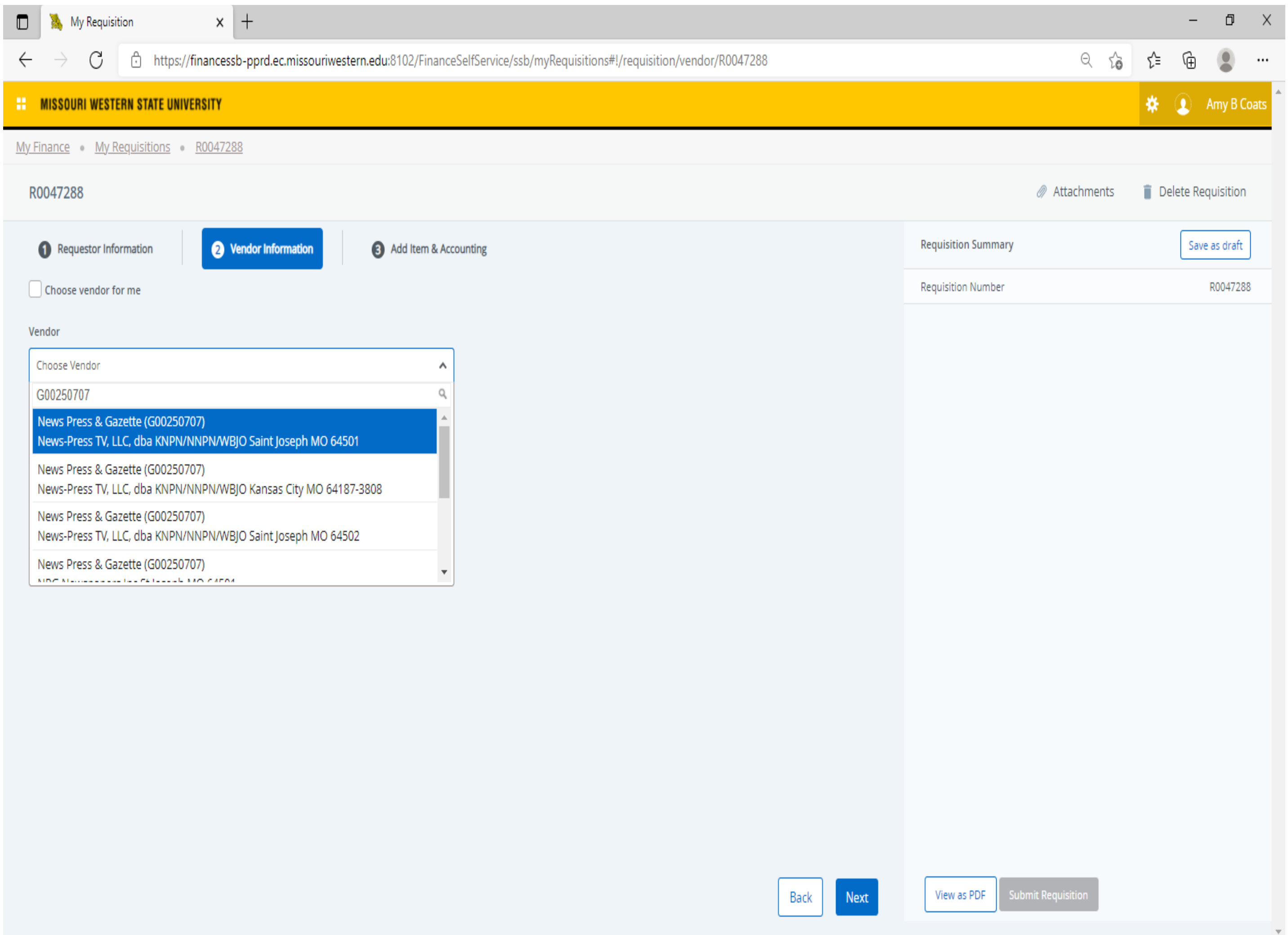
Screen 1: Requester Information

- Requester: Your Name will populate
- Order Date: Today's Date
- Transaction Date: Today's Date
- Delivery Date: Today's Date
- Requester Email: Can leave blank
- Public Comment: This will **print & will be seen on the PO**. Use for contract #s, IFB #s or directions (Example: BuyBoard Contract 123, State Contract 502-16, Please Fax P0 to 816-222-2222 OR Please email to email@email.com)
- Private Comment: Doesn't print – only seen by purchasing Example: Supporting (which should be used sparingly as all orders should be placed with a PO).
- Chart: Always Z
- Organization: Choose your Org from the drop down
- Ship to Location: Always WC Purchasing
- Attention To: Person who will be receiving the merchandise
- Tax Group: Can be left blank

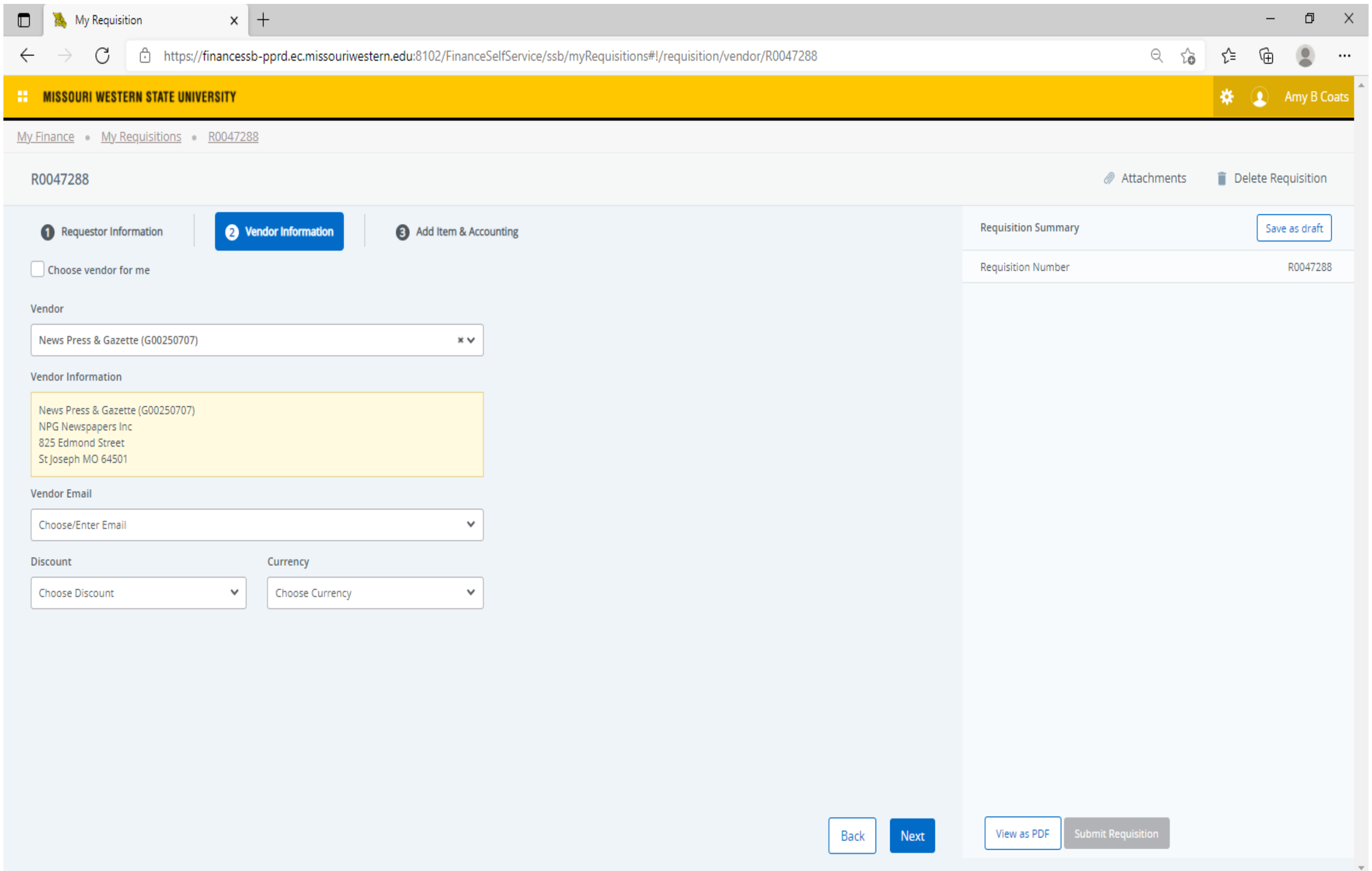
Click Next



Screen 2: Vendor Information
Choose Vendor from drop down box. If you know your G# you can start typing it to populate.
This does take a moment to populate so please be patient.
If you don't know your G# you can scroll through or start typing your vendor name.
Once vendor is found, click on the selection to populate the fields.



Vendor Email: Can be left blank
Discount: Never Use this, always leave as “choose discount”
Currency: Leave as “choose currency”
Click Next



Screen 3

Add Item used to be Commodity Description. Type G1 General then backspace and type your description.

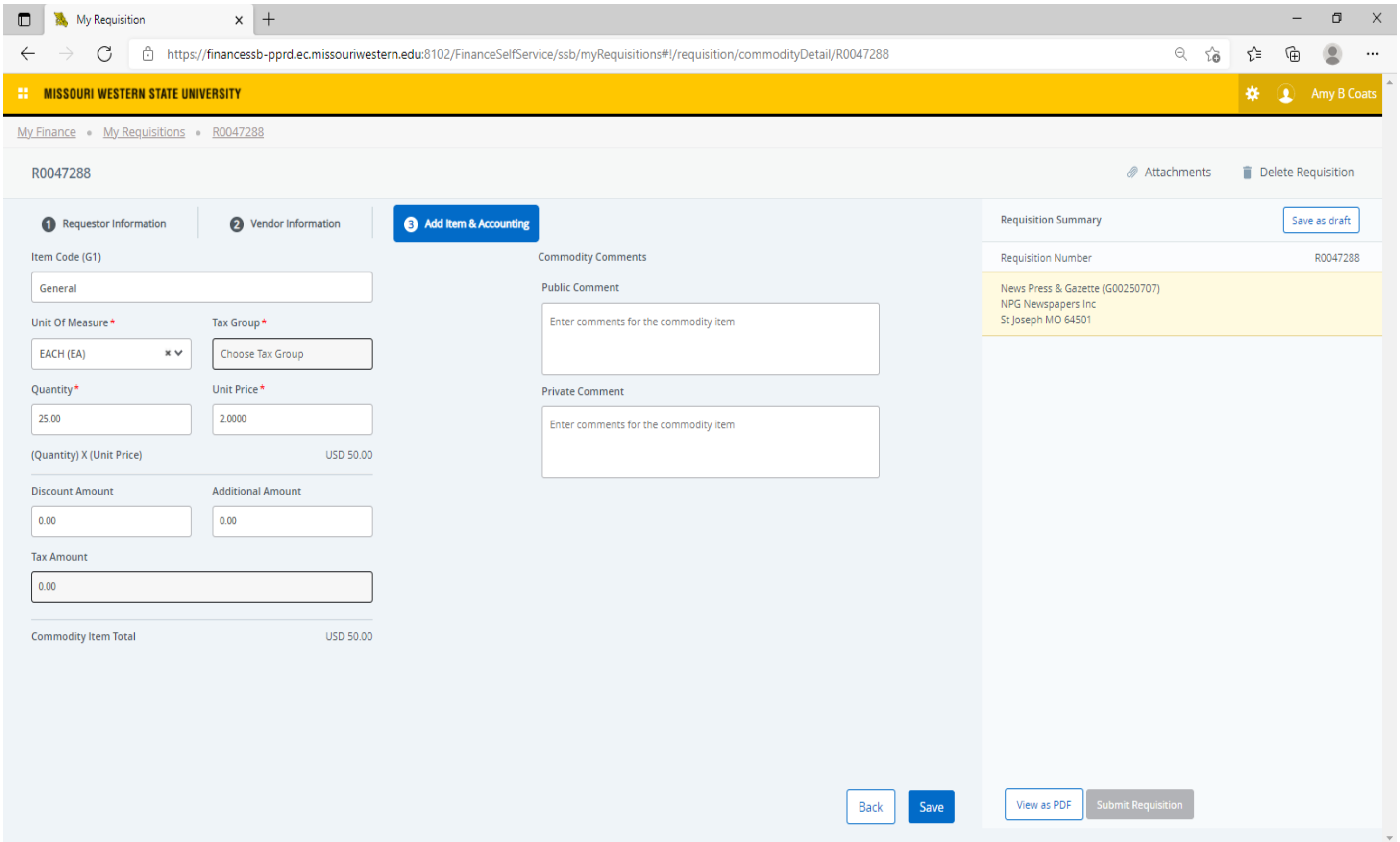
> **Your Description needs to match the quote** (Example if your quote says black electrical tape then your commodity description needs to say black electrical tape, if the quantity is 20 your quantity must be 20). Remember, your requisition is your order form. If you are not specific in what you want to order you may not receive what you expect. Example: You want to shirt to say "Go Griff" but you just put "T-Shirt"; this is not specific and the requisition will be returned to you.

Unit of Measure: Leave as EA Each
Tax Group: Leave as "Choose Tax Group"
Quantity: Type in the exact quantity you are ordering
Unit Price: The price of each item you are ordering
Discount Amount: **Always leave Blank**
Additional Amount: **Always leave Blank**
Tax Amount: **Always leave Blank**
Once this is all filled out the "Commodity Item Total" will be populate

Public Comment: This is where you would **continue the line** if you ran out of room on your first line. Due to the pickiness of Self Service, please don't leave a space or use a special character at the beginning on the line.
Private Comment: Can leave blank. Doesn't print

Click Save

↓



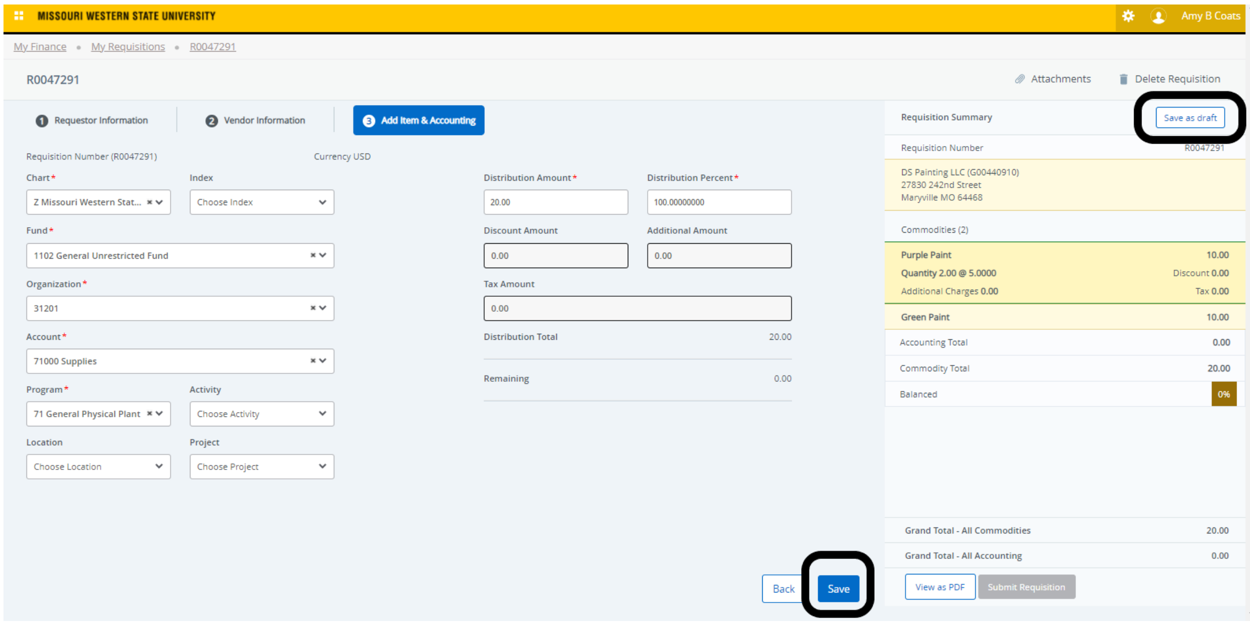
If you do not have any more lines click Save
Click Add Accounting

Chart: Always Z
Index: Leave as “choose index” (MWSU no longer has Index Codes)
Fund: Choose your Fund
Organization: Choose Your Org
Account: Choose the account code that corresponds to your purchase
Program: Choose the program code that corresponds to your purchase
Activity: Leave as “choose activity”
Location: Leave as “choose location”
Project: Leave as “choose project”

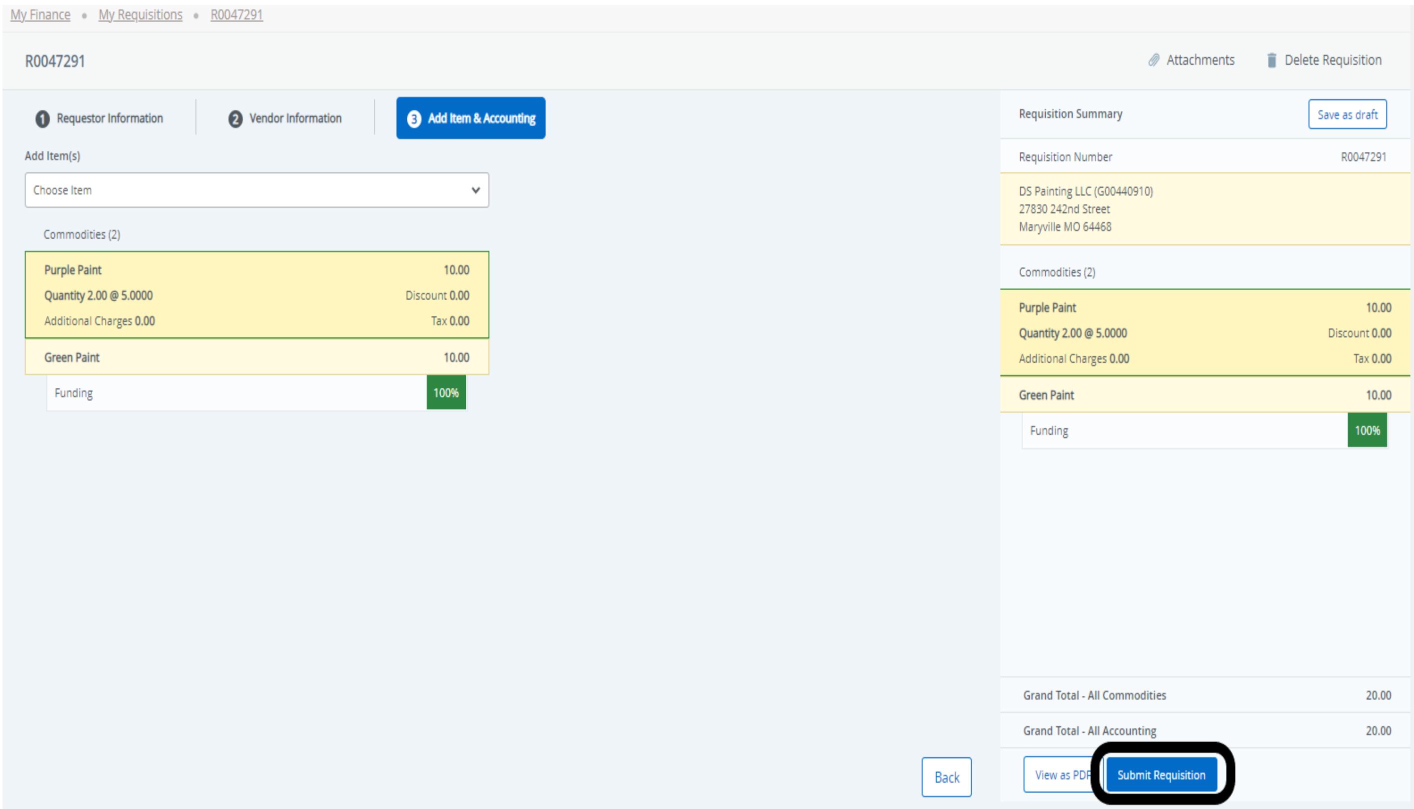
Click Save

Distribution Amount
Distribution Percent: Leave as 100%
Discount Amount: Never Use
Additional Amount: Never Use
Tax Amount: Never Use

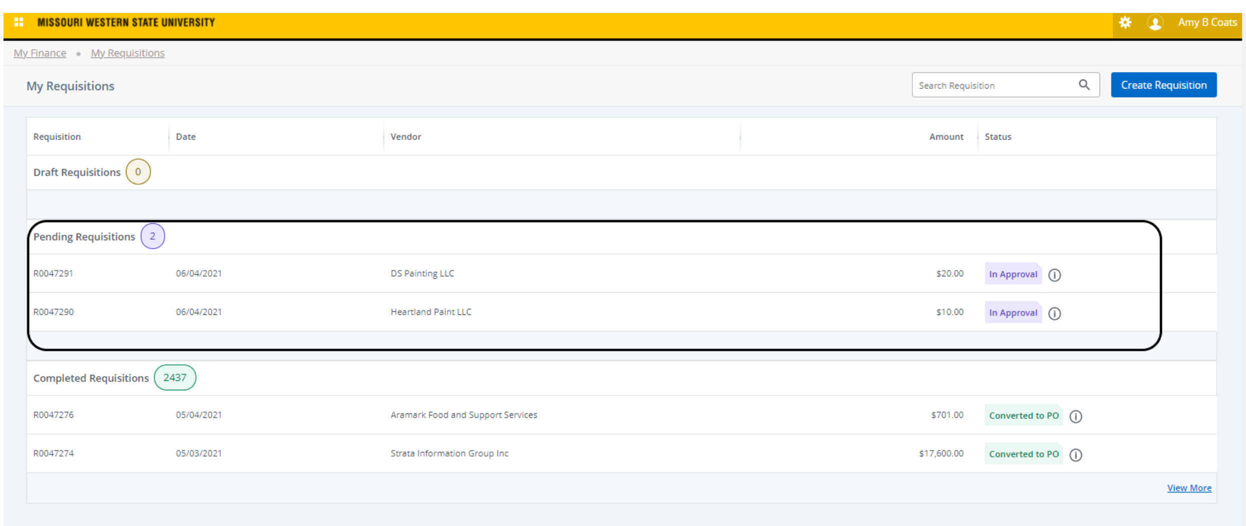
Hit Save or if you need to go back later click save as draft


MISSOURI WESTERN STATE UNIVERSITY
Amy B Coats
My Finance • My Requisitions • R0047291
R0047291
Attachments
Delete Requisition
1 Requestor Information
2 Vendor Information
3 Add Item & Accounting
Requisition Summary
Save as draft
Requisition Number (R0047291)
Currency USD
Chart *
Z Missouri Western Stat...
Index
Choose Index
Fund *
1102 General Unrestricted Fund
Organization *
31201
Account *
71000 Supplies
Program *
71 General Physical Plant
Activity
Choose Activity
Location
Choose Location
Project
Choose Project
Distribution Amount *
20.00
Distribution Percent *
100.00000000
Discount Amount
0.00
Additional Amount
0.00
Tax Amount
0.00
Distribution Total 20.00
Remaining 0.00
Requisition Number R0047291
DS Painting LLC (G00440910)
27830 242nd Street
Maryville MO 64468
Commodities (2)
Purple Paint 10.00
Quantity 2.00 @ 5.0000
Discount 0.00
Additional Charges 0.00
Tax 0.00
Green Paint 10.00
Accounting Total 0.00
Commodity Total 20.00
Balanced 0%
Grand Total - All Commodities 20.00
Grand Total - All Accounting 0.00
Back
Save
View as PDF
Submit Requisition

If you are finished entering your requisition click on submit requisition. If you don't click submit your req won't make it to your approvers and will be "stuck" in the system.

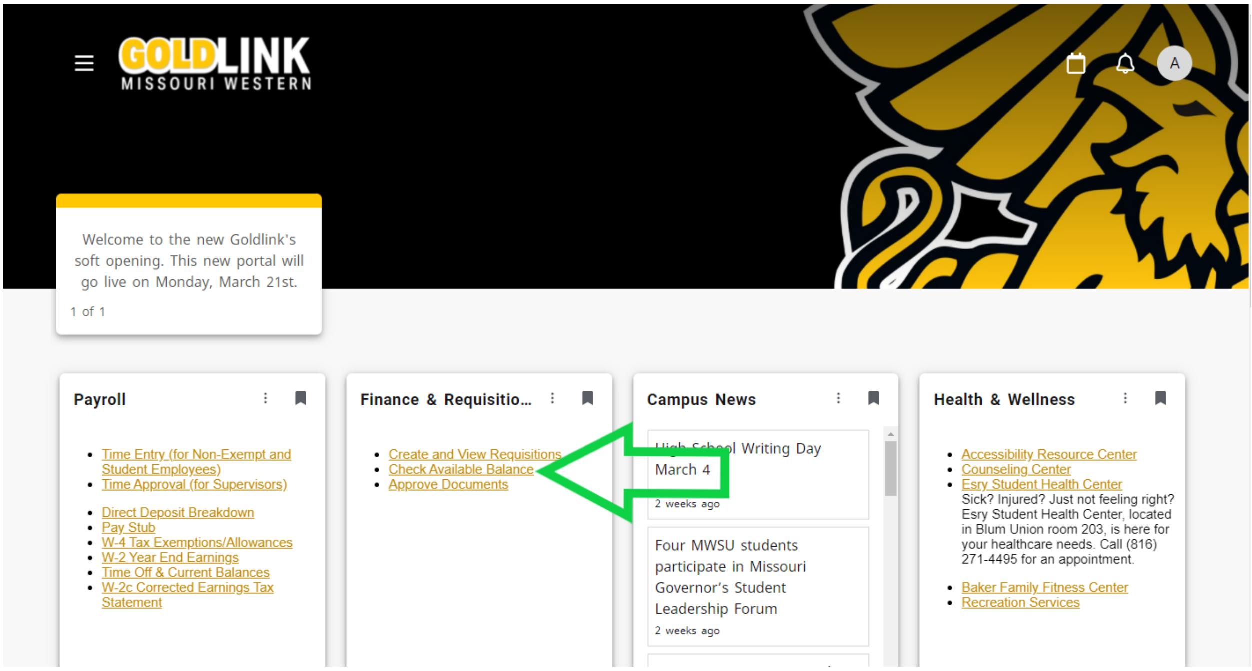


Your R# will then show up under Pending Requisitions
Email this # with your quote to your approver and CC purchase@missouriwestern.edu

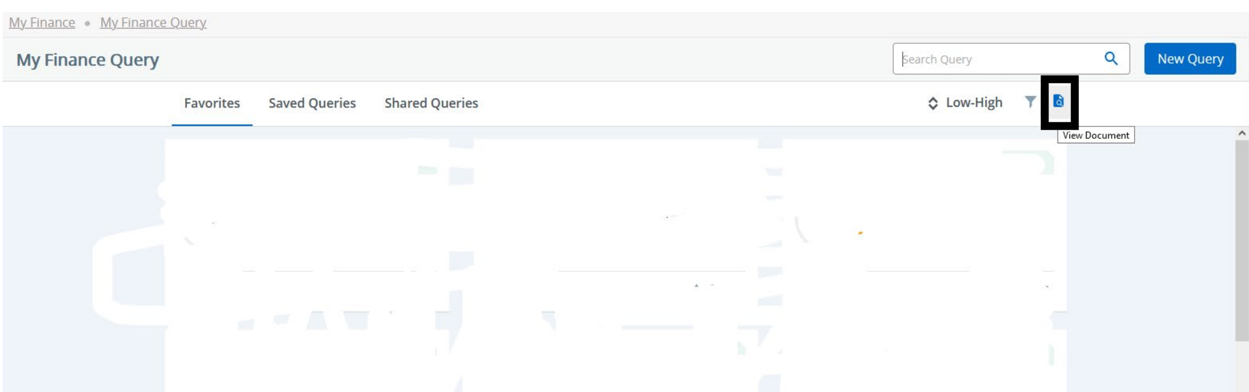


To view your approver

Go to Finance & Requisitions and click on “Check Available Balance”



Click on the document icon

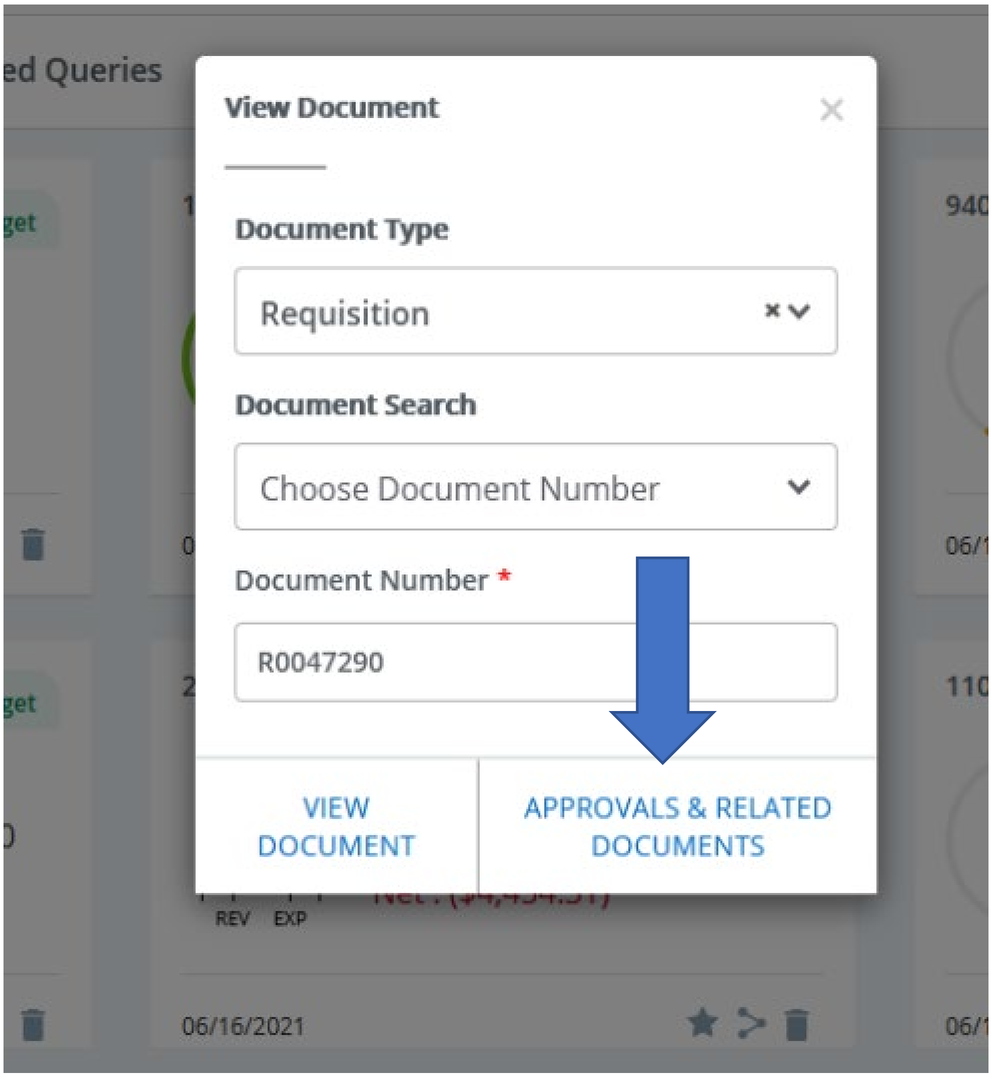


Document Type: Choose Requisition

Document Search: Leave Blank

Document Number: Type in your #

Click Approvals and Related Documents (do NOT hit enter)



Under Approval History you will see who has approved and who needs to approve