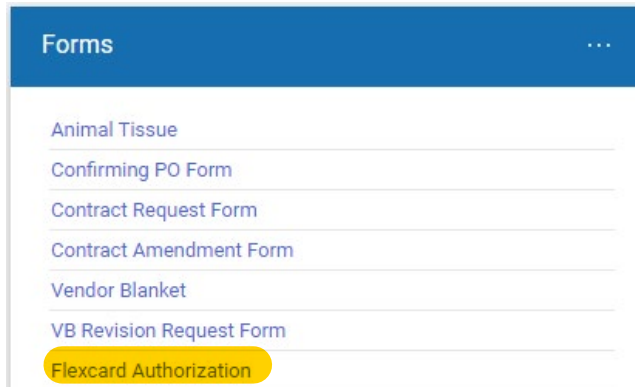


How To Create a Flexcard Order

FORMS


Forms are used for special purchasing situation and once completed are added to a new cart. Instructions are located inside each form. Users can access Forms on the homepage of Gateway and by clicking on the name of the Form.



This is an example of the Flexcard Authorization Form.

Form • Flexcard Authorization Close Add And Go To Cart

General Information



1. Use this form to request Flexcard authorization in **Gateway**. Note: This Form cannot be used for federal orders over \$9,999.99. Please use a standard purchase order for federal orders exceeding this amount.

2. Field names in **bold text** are required.

3. In order to ensure proper handling of your request, you must do the following:

- Enter the **Supplier** you wish purchase your goods from.
- Specify the **Order Placement**

4. List out the items, price, and quantities of the goods you are buying on your flexcard.

5. This form will be routed to the department buyer approver to place the order on Flexcard. Once the request has been processed through the departmental workflow to PO will auto-close preventing receiving/invoicing. On orders over \$5,000 the order will automatically be routed to the Flexcard Administrator for approval.

Do not mix the Flexcard Authorization Form with a catalog or non-catalog order. The Gateway system will automatically return your entire requisition to your draft carts.

Supplier Information

Supplier Name * JLCPB

Supplier Contact Name Barry White

Supplier Contact Email/Phone orders@jlcpcb.com

Order Information

Order Placement * Order placed with ANOTHER Flexcard

Flexcard Holder's Name Jewels Bolden

Order Items List

Description	Price	Quantity	Ext. Price
Anti-mTTP (Rat) "Brainbow"	49.99	1.00	49.99
Antibody Shipping Fee (USA)	35	1.00	35.00
			0.00

Total 84.99

Additional Information

Internal Attachments Add

Existing Supplier

Supplier * Flexcard Supplier

Fulfillment Address **Flexcard Tracking**
Business and Financial Services
3203 SAASB
Santa Barbara, CA 93106-1150

Supplier Phone +1 805-893-8025

Add attachments. This is where you add a quote, or a screenshot of the cart, or any information needed to place the order. Please note our purchasing Coordinator is not a Researcher, please provide as much information as you can to assist her.

After filling out the information in the Form, select "Add to new cart," from the Available Actions drop down menu. This will add the Form to a new cart, make it the active cart and open the new cart in one step.

Forms cannot be mixed with punch-out, hosted catalog or non-catalog items. They need to be in their own cart. To continue with your order finalize the cart.



Add the necessary details and accounting information by selecting the pencil icon in the upper right-hand of each section.

Requisition • 178251254

Summary Taxes/S&H Comments Attachments History

Order Info

Cart Name: 2023-10-17 jewels 01

Description: Lab Supplies

Prepared by: Jewels Bolden

Prepared for: Jewels Bolden

PO Description: Lab Supplies

Share cart: No user groups available

PO Clauses

PO Clauses: [View details](#)

Addresses

Bill To

Accounts Payable Department
The Regents of the University of California
3201 Student Affairs and Administrative
Services Building (SAASB)
Santa Barbara, CA 93106-2040
United States

Ship To

ATTN: Jewels Bolden
Room No. 3448
California NanoSystems Ins
Elings Hall room 3448
University of California, Santa Barbara
Santa Barbara, CA 93106-6105
United States

Delivery Options

Ship Via: Best Carrier-Best Way

Requested Delivery Date: no value

Approvals

Additional Approvals

Ad-Hoc 1 (Dept Buyer Pre) no value

Ad-Hoc 2 (Account Approver) no value

Ad-Hoc 3 (Dept Buyer Post) no value

Campus Purchasing Review no value

Summary **Draft**

Total (91.58 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	84.99
Sales Tax	6.59
Shipping	0.00
Handling	0.00
Total	91.58

What's next for my order?

Next Step: Department Pre-Approval

Approvers: [Bolden, Jewels](#), [Dunson, Julie](#), [Gloo, Christopher](#), [Leininger, Lynne](#)

Workflow: [Draft Active Jewels Bolden](#), [Department Pre-Approval Future](#)

Accounting Codes

Department	Account String	Sub Account	Cost Type	Fund Type	Award Type	Award End Date Within 90 Days	Award End Date	Account Group Code	Department Invoice Review
CNSI CALIF NANO SYSTEMS INSTITUTE	CNSI-0-8-447800-59533	3 SSE	SUP SUPPLIES & EXPENSES	13 FEDERAL FUNDED 100%	2 CONTRACT	Y	09/30/2004	300050 CURR EXPENDITURES-RESEARCH	CNSI Department Approval

It is required that both the Commodity Code and Object Code are entered.

Click on the Spyglass icon to search for the desired Commodity Code. If you need help, click "Commodity Code - Click? for help," link.

Size/Packaging	Unit Price	Quantity	Ext. Price
EA	2.79	4 EA	11.16

Taxable

Commodity Code - Click? for help

00000000

Select Valid Commodity and Object Code

Object Code

Search

This search can be performed in two ways, either by entering up to the first four digits of the commodity code, in the “Code starts with...” field or by entering a key word in “Description contains...” field. Click “Search.”

The image shows two screenshots of the 'Commodity Code Search' interface. The top screenshot shows the search box with '41' in the 'Code starts with...' field and 'Description contains...' as a placeholder. The bottom screenshot shows the search box with 'laboratory' in the 'Description contains...' field.

The search result window opens with a selection of Commodity Codes to choose from. Once you have found the proper Commodity Code click the plus sign.

Code ↑	Description	
41000000	Laboratory & Measuring & Observing & Testing Equipment (Object Code 8020 8040 8120 9120 9610)	
41100000	Laboratory and scientific equipment. Including baths, tissue processing, refrigerators, freezers, glove boxes, fume hoods, centrifuges, incubators, furnaces, pumps, electrophoresis systems, tissue processors, DNA processors, growth chambers, and washers.	
41120000	Emulsifiers, components and accessories. Including laboratory glassware, slides, tools, crucibles, storage containers, and pipettes.	

After the Commodity Code is selected, it will be transferred to the Commodity Code field in the cart. Search for the list of compatible Object Codes. Click the plus sign to select the code.

Size/Packaging	Unit Price	Quantity	Ext. Price	
EA	2.79	<input type="text" value="4"/> EA	11.16	... <input type="checkbox"/>

Taxable

Commodity Code - Click? for help

Object Code

8040 - Laboratory Supplies Object Code

Once done, select Submit Requisition

...