Now using the new website for all purchases!

What’s different from the old system?

- All purchases should be recorded, not only reimbursements
- Direct integration with funding sources, budgets, cycles, fiscal years, purchase methods, file types, bank accounts, and more
- Action histories (including notes)
- Automatic validation for common issues
Purchasing System Tutorial

**Input Validation**
- **Title** is included and is within the length limit
- **Description** is within the length limit
- A **total amount** is provided
- A payment method is provided
- A **vendor** was chosen
- A purchase date is provided

**Allocations / Cycles**
- An allocation is chosen
- A chosen allocation is not from this cycle
- The funding assignment would **overdraw** an allocated source
- An event date is not from the chosen cycle

**Funding Sources**
- Reimburse amount is not greater than total amount
- Selected same non-auto funding source more than once
- Specified an invalid amount for a non-auto source
- A payment method is provided
- A vendor was chosen
- A valid action with all info
- A purchase date is provided

**Event Info**
- Event info was provided if food (meetings) is the expense type
- Event info was provided if food/beverage is the expense type
- Event info was provided if an event info was provided if food/beverage is the expense type

**Expense Type**
- Expense type is chosen

**Purchase Date or Event Date**
- Purchase date or event date is not from the chosen cycle

**Syncing with Atlas**
- RFP info, P-Card info
- Atlas information was provided if stage is external
- Credit card vs p-card

**Purchasing Methods**
- Payment method restrictions
- Funding source restrictions
- Required files were uploaded
- Funding source restrictions

**Alcohol Approval**
- Alcohol approval forms are included if purchase includes alcohol

**Other** vendor was chosen

**Invalid Amount**
- Specified an invalid amount for a non-auto source

**Manually Specified Source Amounts**
- Manually specified source amounts total less than purchase amount and no auto source is selected

**Assignment**
- Assigned sources are charged to accounts other than the direct account if it's a non-personal purchase

**Event Info**
- Event info was provided if food/beverage is the expense type
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Purchasing System Tutorial

My Purchases
- Record purchases, submit reimbursement requests
- View status of purchases and actions taken
- Modify purchases if needed

Action Center
- View purchases that are pending your action
- Approve or deny purchases, provide notes to next person
- Modify purchases if needed

All Purchases
- Search all recorded purchases
Submitting a Purchase

Use the **My Purchases** page

Select *Add Entry*

Fill out all relevant information

Upload all relevant documents

Review and address any warnings or errors

Review pending changes and click *Proceed*
Submitting a Purchase

Online Submission

- Transactions
  - All Purchases
    - My Purchases (View / Submit)
    - Purchase Action Center (Approve / Deny)
  - Add Entry (Ctrl+Shift+Enter)

Physical Submission

Gather physical copies of all documents, including receipt and proof of payment

Print the emailed cover sheet

Staple cover sheet to documents

Drop off in HGO mail slot (room 156)
Purchase Requirements

What to look for when submitting or approving a purchase

- No tax
  - Tax exemption forms available online: vpf.mit.edu/forms/4/all
- Itemized receipt and proof of payment
  - Itemized receipt: in english, in USD, with list of items purchased and whether any tax was included
  - Proof of purchase: last 4 digits of credit card, bank account snippet, or says “paid by cash”
  - If using Amazon, must be “Final Details for Order…”
- Alcohol approval forms required if purchase includes alcohol
- The correct allocation and budget cycle are assigned
  - The allocation is not overdrawn
- Any manually specified funding sources are correct
- Title and details are descriptive and informative