

# Purchasing System Tutorial

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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

**purchaser info** (+ all mailing info if non-MIT)  
title is included and is within the length limit

**event info** was provided if food (meetings) is the expense type

**event date** is not from the chosen cycle  
an **allocation** is chosen

## Input Validation

**description** is within the length limit a total amount is provided

event info was provided if **food/beverage** is the expense type

## Allocations / Cycles

chosen allocation is not from this cycle

a payment method is provided

**expense type** is chosen

a **vendor** was chosen

**purchase date** or event date is not from the chosen cycle

funding assignment would

**overdraw** an allocated source

## Syncing with Atlas

“Other” vendor was chosen

**purchase date** or event date is not from the chosen cycle

RFP info, P-Card info

**atlas information** was provided if stage is external

valid **action** with all info a purchase date is provided

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

## Purchasing Methods

## Funding Sources

**reimburse amount** is not greater than total amount

manually specified source amounts total less than **purchase amount** and no auto source is selected

**payment method restrictions**

credit card vs p-card

selected same non-auto funding source more than once

**funding source restrictions**

won't be processing a reimbursement if a non-personal method was chosen

specified an **invalid amount** for a non-auto source

**manually specified funding** amounts total more than purchase amount

**required files** were uploaded

erroneously declared as a personal expense

If it's a P-Card form, only show a warning if it's creation step

amount was provided for an **auto-select** field

**alcohol approval** forms are included if purchase includes alcohol

a **reimburse amount** is provided if chose a personal payment method

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## 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*

▼ Transactions

🔗 All Purchases

🔗 My Purchases (View / Submit)

🔗 Purchase Action Center (Approve / Deny)



Add Entry (Ctrl+Shift+Enter)



**Error:** Purchase has a personal payment method, but no reimbursement amount.

**Dismissible Error:** Purchase does not have a Receipt (Itemized) uploaded.

Dismiss Error

**Warning:** Purchase will assign \$66.66 to GSC-FB, which has a restriction that **the event must be open to all MIT graduate students**. Please ensure that this criteria is satisfied.



**Warning:** You are about to perform a **potentially dangerous action**. Make sure you want to edit the database to reflect all modifications before proceeding.

Changes being committed:

- 0 deletions
- 1 insertion
- 0 modifications
- The below table shows the affected rows
- If you cancel, you will return to the edit screen with your changes intact

Proceed

Cancel

# Submitting a Purchase

## Online Submission

▼ Transactions

- All Purchases
- My Purchases (View / Submit)**
- Purchase Action Center (Approve / Deny)

↓

Add Entry (Ctrl+Shift+Enter)

↓

**Error:** Purchase has a personal payment method, but no reimbursement amount.

**Dismissible Error:** Purchase does not have a Receipt (Itemized) uploaded. Dismiss Error

**Warning:** Purchase will assign \$66.66 to GSC-FB, which has a restriction that the event must be open to all MIT graduate students. Please ensure that this criteria is satisfied.

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**Warning:** You are about to perform a **potentially dangerous action**. Make sure you want to edit the database to reflect all modifications before proceeding.

Changes being committed:

- 0 deletions
- 1 insertion
- 0 modifications
- The below table shows the affected rows
- If you cancel, you will return to the edit screen with your changes intact

Proceed Cancel

## 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

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## What to look for when submitting or approving a purchase



- No tax
  - Tax exemption forms available online: [vpf.mit.edu/forms/4/all](http://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

