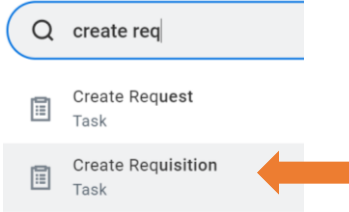
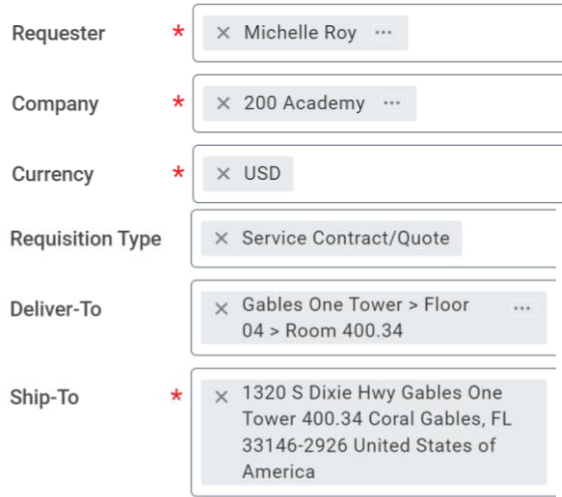






Catering Purchase Orders

All requests must be submitted before the event takes place. The recommendation is to submit 1 week in advance to obtain all approvals and give the supplier time to fill the order.

For orders that include hotels, deposits, or multiple invoices, instead of using this guide, contract the [Purchasing Help Desk](#).

Use this tutorial to create a purchase order in Workday. Quotes with deposits and multiple invoices, must choose "Request Non-Catalog Item" and "Request Services."

Obtain a Quote	
1. When possible, find a supplier that has been onboarded for Workday purchase requisitions.	Tools: <ul style="list-style-type: none"> • Diverse Suppliers in Workday • Find onboarded suppliers for purchase requisitions.
2. Find the supplier's customer service contact(s) in UMarketplace and obtain a quote.	Supplier Tip: This step, ensures the correct supplier and location are listed on the PO. This can avoid having to create an additional requisition or experience delays in service.
Create a Purchase Requisition	
3. Log into Workday.	http://workday.miami.edu
4. In the search box type " Create Req " and select Create Requisition. TIP: If the <i>Create Requisition</i> link does not appear, configure your Workday Search Box results to include <i>Procurement</i> .	
5. Complete the fields as follows: <ul style="list-style-type: none"> • Requester – Leave as yourself, even when ordering on behalf of someone else. • Company – The company should correspond to the driver work tag (Program, Grant, Gift, or Project). • Currency – USD • Requisition Type – Service/Quote • Deliver-To – TIP: Search by typing the building name and room number. E.g., "Gables One 400.34" • Ship-To - Replace <i>Accounts Payable</i> with the shipping address. TIP: Search by typing the street address and room number E.g., "1320 400.34" 	

<ul style="list-style-type: none"> • Program, Grant, Gift, or Project: This is the worktag that will be used to pay for the item(s). TIP: Split accounting can be applied on the <i>Summary</i> page, just before submitting the requisition. TIP: The remaining fields on this page will auto populate. 	<div style="display: flex; flex-direction: column;"> <div style="margin-bottom: 5px;">Grant <input style="width: 100%;" type="text"/></div> <div style="margin-bottom: 5px;">Program × PG000999 Director University Purchasing</div> <div style="margin-bottom: 5px;">Gift <input style="width: 100%;" type="text"/></div> <div style="margin-bottom: 5px;">Project <input style="width: 100%;" type="text"/></div> </div>
6. Click OK .	
7. Click Request Non-Catalog Items .	Request Non-Catalog Items
<p>8. Complete the fields for the first line item on the quote. Repeat steps for each additional item. For example, a quote containing two line items will require the non-catalog form to be completed twice.</p> <p>Line 1 Example:</p> <ol style="list-style-type: none"> a. Click Request Service.  Request Service b. <i>Description</i> – Type the quote/event number and the item description, quantity, unit of measure and price. E.g., “Event #54321, Cookie & Brownie Feast, Qty 40 each x 3.95” c. Spend Category - E.g.: SC08619 – Meetings Subsistence, SC08623 - UM Dining Services or SC08624 – Entertainment d. <i>Supplier</i> – E.g., “Compass Group” (Doing Business As Chartwells, P15451009) e. <i>Supplier - Contract</i> (leave blank) f. <i>Start Date</i> – E.g., 1/17/23 g. <i>End Date</i> - E.g., 1/17/23 h. <i>Extended Amount</i> - E.g., \$158.00 i. <i>Memo</i> - E.g., “Purpose - New Student Orientation. Attendees – 40 students, staff and faculty.” j. Click Add to Cart. k. Click Ok. <p>Line Item 2 Example:</p> <ol style="list-style-type: none"> l. Click Request Services.  Request Service m. <i>Description</i> – E.g., “Assorted soft drinks, freshly brewed Starbucks coffee and assorted herbal teas 40 each x \$1.95” n. Spend Category - E.g.: SC08619 – Meetings Subsistence, SC08623 - UM Dining Services, or SC08624 – Entertainment o. <i>Supplier</i> - E.g., “Compass Group” (Doing Business As Chartwells, P15451009) p. <i>Supplier - Contract</i> (leave blank) q. <i>Start Date</i> - E.g., 1/17/23 r. <i>End Date</i> - E.g., 1/17/23 s. <i>Extended Amount</i> - E.g., \$78.00 t. <i>Memo</i> - E.g., “Purpose - New Student Orientation. Attendees – 40 students, staff and faculty.” u. Click Add to Cart. v. Click Ok. 	
9. Once all items are added to the cart, click the shopping cart icon in the upper right corner.	

10. Review the items and click *Checkout*.

Event #54321, Cookie & Brownie Feast, Qty 40 each x 3.95
Quantity: 1 \$158.00

Assorted soft drinks, freshly brewed Starbucks coffee and assorted her...
Quantity: 1 \$78.00

Checkout Total: 236.00 USD

11. To remove items, click the “-“.

Services

2 items

	C	In	C	Qty	Description	
				+	-	Assorted soft drinks, freshly brewed Starbucks coffee and assorted herbal teas 40 each x \$1.95

12. To split the accounting on all line items, scroll to the bottom, click the related options button (three dots), and select **Edit Requisition Defaults**.

Edit Requisition Defaults
Edit Address
Cancel

...

Select **Use Default Splits** and scroll down. Use Default Splits

Click the “+” once to split the line item among two worktags, then complete the percentage and worktag information.

	Percentage	N G Program	Gift	Project
+	50			
-	50			

13. Attach supporting documentation.

Required:

- Quote
- List of attendees

If applicable:


- Event flyer

Attachments

Drop files here

or

Select files

14. Review and Submit . This will begin the approval process.	
15. Review the approvals and status .	
16. If changes need to be made, initiate a change order and provide the supplier with the updated information.	
17. If the department receives an invoice, submit the invoice to Accounts Payable to process payment.	