Amount Only Purchase Orders (POs) are for purchasing goods when the purchaser doesn't know the specific items he or she will need during a specified time frame but needs to encumber funds. This type of PO requires a $1000 minimum amount and is discouraged because specific information about what was purchased is lost, preventing Purchasing from bidding or negotiating discounts with vendors. However, sometimes they may be necessary.

Amount Only POs require special handling by Purchasing Coordinators to ensure you can receive by Amount. Their use will be granted at the discretion of the Buyer. Make sure your requisition’s “Justification/Summary” field includes an explanation of why an Amount Only PO for Goods is needed. To learn more about requisitions, attend “Introduction to Purchasing and Payables.”

- Log into the system via the myUFL portal, using your GatorLink user id and password (http://my.ufl.edu)
- Go to Create Requisition by navigating through the menu:
  - eProcurement
  - Create Requisition
  - Change Business Unit from UFLOR to the first four digits of the appropriate Department ID
  - Then click “OK”
- At the “Requisition Summary” screen:
  - Enter a “Requisition Title”
  - Then click “Special Request”
- At the “Special Request Type of Item” screen:
  - Select “Good.” We are creating an Amount Only PO for Goods
  - Then click “Next”
- At the “Special Request—Goods” screen:
  - In the **Description** field (240 characters), enter:
    - A general description of what you are buying. Include three specific examples of what is being purchased
    - A list of authorized UF employees who may order from the PO
    - The beginning and ending dates for which the PO is valid

For example: "Amount only PO for lab supplies to include beakers, pipettes, and Petri dishes. Authorized users: Dr. Albert Gator, Jonah Whale, and Sarah Poole. Valid 7/1/04 – 6/30/05."
Amount Only Purchase Orders for Goods

- In the “Category” field:
  - Select the appropriate category for the purchase using the magnifying glass view icon
  - When searching, remember to use the “contains” search option
  - Check the Purchasing website for information on approved “Amount Only for Goods” categories:  http://www.purchasing.ufl.edu/peoplesoft.asp
  - Remember: Receiving may be required depending on the category selected

- In the “Qty” field, enter 1.0
- In the “Unit of Measure” field, enter LOT
- In the “Price” field, enter the amount to be encumbered. Remember: $1,000 is the minimum amount
- In the “Currency” field, USD for US Dollars should be the default

- In the “Due Date” field, enter the ending date of the purchase order
  - Using our example from Page 1 of this guide, this would be 6/30/05

- Next, click the “Vendor Lookup” link to enter and select the appropriate vendor
  - Do NOT use the “Suggest a Vendor” link

- When the “Special Request—Goods” screen is complete, click “Add Item” to return to the “Requisition Summary” screen. Here’s an example of a completed screen:

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**Special Request - Goods**

**Description:** Amount only PO for lab supplies to i

**Category:** 41121800

**Qty:** 1.0000  **Unit of Measure:** LOT

**Price:** 5000.00000  **Currency:** USD  **Due Date:** 06/30/05

**Vendor ID:** Fisher Scientific Co LLC

**Comment Text:**

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Add Item
At the “Requisition Summary” screen, click the truck icon

**IMPORTANT:** At the “Shipping Information” screen, verify the defaulted address is where you want the product(s) shipped
- To learn how to verify your shipping information, attend “Introduction to Purchasing and Payables.” If the needed address is not available, see the “Shipping Information” instructional guide for required steps

Next, click the cost distribution icon (see below)

At the “Distribution Information” screen:
1. **Change the “Distributed by” field from Qty (Quantity) to Amt (Amount)!!**
2. On the “Details” tab, an Amount should then be listed
3. Review the ChartFields to ensure they are correct. Change as needed

Click “Return to Requisition Summary” link at the bottom

Now, at the “Requisition Summary” screen, click the “Justification/Summary” link
- **This is a required field.** Enter a thorough justification as to why this Amount Only PO for Goods is necessary
- When finished, click "Return to Previous Page" link

Save and submit your requisition
Notes:

Instead of requesting an Amount Only PO for Goods, consider creating a requisition for the specific item(s) needed including the entire quantity needed for the fiscal year. Add a comment to the vendor that the PO is for encumbrance purposes only and releases will be made by authorized personnel. Include names of authorized personnel in the comment. For more training on comments, see the “Create a Purchasing Requisition” instructional guide at www.bridges.ufl.edu

Do NOT use a University Contract ID on the Line Details page with an Amount Only requisition. Amount Only requisitions require special handling by Purchasing. A requisition using a University Contract will bypass Purchasing, and the purchase order will not be issued as an Amount Only. This will create problems when vouchering to pay the vendor.