



Purchasing Items Covered by a Contract

1. Speak to your consultant to see if you can afford to make the purchase
 - a. If not, create a budget to save the money and establish a timeline for the purchase
2. Find out what Vendors you can work with by visiting the website listed for University, MHEC & State Contracts
<http://www.umass.edu/procurement/aboutcont.html>
3. Call each vendor and ask them to fax a quote for the item using UMass Contract pricing for Contract #___. The fax number at the CSB is (413) 577-3353
 - a. Be sure to read the contract's additional information such as whether there are delivery fees, return policy, restocking fees, etc
 - b. Make sure the prices you receive from each vendor are for comparable items
 - c. Ask about anticipated delivery time from the date of your order (you will have to wait until you have a University Approved Purchase Order before placing the order)
 - d. Write down the name and phone # of the sales rep.
 - e. Review your idea with the university operations manager who supports your area: Sylvan – Aida Claudio, Sweets & Greeno – Ted Mone, Student Union – Meredith Schmidt.
 - f. If the equipment is related to a food business, be sure to consult with Larry Davis at Environmental Health & Safety.
 - g. If you would like assistance from the CSB make an appointment with Rosemary (for operational or financial advice) or Donna (for purchasing advice)
 - h. Present your information to your Student Business and Consultant and decide which vendor you will use based on price & delivery time, etc.
4. Work with your bookkeeper to write out a purchase order request and submit it to the Center for Student Development (CSD) for processing. Attach the quote that you received by fax from the vendor. Keep a file a copy of all paperwork for your business.
5. The PO may take a few extra days to pass through the approval process because of the dollar amount.
 - a. You may need to complete a credit application with the vendor or they may need a copy of the university tax exempt certificate – the CSD Purchasing Coordinator will assist you
6. When you get the Purchase Order, (it will be delivered to your mailbox in the CSB,) call the sales rep you worked with and then **fax** the PO to the vendor to place your order
 - a. Confirm the expected delivery date and review any delivery instructions
 - b. Contact the operations manager of your building and notify them of the expected delivery date
7. Once the item is received, you will be required to verify that it was in good condition before the invoice will be paid
8. Submit the invoice to your Bookkeeper for processing (the same as any invoice)
9. The payment will be confirmed on the monthly University Account Statement which is reconciled by your consultant
10. File a copy of the instruction manual & warranty information in your business file in the CSB