

## How to Fill out a Purchasing Requisition Form

\*\*Find the requisition form at [WFU | Procurement Forms](#)

**Before you begin, make sure that the purchasing requisition is opened in Adobe Acrobat Pro (8, 9, or higher) and DO NOT open it in Adobe Reader. If you are having difficulties or the form keeps opening in Foxit, contact Information Systems.**

### Requisition Form

\*\*Use the TAB key to move between fields\*\*

1. Requisition Date:
  - a. Click in the field.
  - b. Click on the drop down box (See image on the right) and a calendar will appear.
  - c. Click the desired date.
2. Requested By:
  - a. Fill in the name of person(s) who is ordering/receiving the item. \*Does not have to be the receiver of the item\*
3. Requestor's Information:
  - a. Fill in Campus PHONE number, FAX number (if possible), and E-MAIL of the requestor. \*A copy of the Purchase Order will be sent to this e-mail address or fax.\*
4. Delivery Date:
  - a. Click in the field.
  - b. Click on the drop down box.
  - c. Click the desired date.

\*This field applies to the date the goods need to be on campus, within the University's possession. This is not a shipping date, or next day date, or ASAP. With the exception of service contracts, no product can arrive on the same day the Purchase Order is processed.\*
5. Bill to Department:
  - a. Enter the Department that should receive the invoice for the purchase.
6. Department P.O. Box:
  - a. Enter the P.O. Box number associated with the department to be billed.
7. Send Purchasing Order to Supplier:
  - a. Answer Yes or No.
  - b. If no, send Purchase Order to: (Fill in the blank)  
\*If yes, Procurement Services will send the completed Purchase Order to the supplier and copy the requestor. If there are other people the requestor wishes to have the Purchase Order sent to, please provide these names as well.\*
8. Shipping Location:
  - a. Enter in the shipping location.  
\*This does not require a street address if the goods/services are to be delivered on campus. Provide the building name. Example: Goods/services are ordered to English, then put Tribble Hall. If the requestor is in the University Corporate Center, write down the University Corporate Center and it will be delivered accordingly.\*
9. Shipping ATTN to:
  - a. List the person to whom the item is being shipped. Include a room number.

The image shows a portion of the Wake Forest University Purchasing Requisition Form. At the top left is the Wake Forest University logo. To the right of the logo, the text reads "WAKE FOREST UNIVERSITY". Below this, there are two bullet points: "Send completed requisition" and "Upon delivery, verify good discrepancies to Purchasing". The main focus is on a table with two columns. The first column has a header "Requisition Date: Use drop down" and a text input field below it. The second column has a header "Requisition Date" and a drop-down menu below it. A red arrow points from the text "Use drop down" to the drop-down menu. Below the first column, there is a header "Bill to Department:" and a text input field. The second column has a header "Department" and a text input field.

10. Business Purpose:

- a. Enter what the expense is for or a general description of what is being order. Example: Computer Software Upgrade or Research Supplies for Lab

11. Supplier Information:

- a. Enter in information accordingly for Supplier Name, Contact Name, E-mail, Phone, and Fax.  
\*Whenever possible, Purchasing prefers to e-mail Purchase Orders.\*

12. FOAPAL:

- a. COA: Chart (Reynolda Campus **R**, Reynolda House **H**, WFU Development Foundation **F**, Wake Forest University Foundation **X**)
- b. Fund/Project: 6 digit code starting with either 1, RG, RC, P, E, or D
- c. Dept #: 6 digit number associated with desired department

- d. Account: 5 digit number pertaining to the commodity.  
Example: A chair would fall under the category of FURNITURE (51510) [Click here](#) for a complete list of accounts and their definitions.

COA	Fund/Project	Dept #	Account	Activity	Location	Amount
				U	L	
				U	L	
				U	L	
				U	L	

- e. Activity (If Applicable): 5 digit code beginning with the letter U or G
- f. Location (If Applicable): 5 digit code beginning with the letter L
- g. Amount: The price being charged this FOAPAL.  
\*Multiple Accounts can be charged for one item, indicate which item will be split and the amount to be taken from each account using different FOAPAL lines. You may do this in the description area as well as in the FOAPAL.\*

13. Fixed Asset:

- a. Click Yes or No (For SINGLE item(s) over \$5,000: requires special Account numbers)

14. Maximum Pre-approved Cost:

- a. Maximum amount allowed to be spent as stated by the authorized approver.

15. Description, Quantity, Unit Price, Amount:

- a. Description: Insert basic description of item being purchased.
- b. Quantity: How many of the products are being purchased.
- c. Unit Price: How much each individual purpose costs.
- d. Amount: Automatically generated from Quantity and Unit Price. \*If the form does not automatically calculate, your JavaScript may be disabled. Please contact your local IS handler or the Help Desk to aid in enable the JavaScript\*

Description	Quantity	Unit Price	Amount
SanDisk Cruzer USB 2.0 Flash Drive, 16GB	2	\$39.99	\$79.98
Swingline 545 Antimicrobial Standard Desk Stapler, Black	1	\$8.49	\$8.49

16. Authorized Signature:

- a. Non-electronic signature: Enter name and forward approving e-mail to purchasing or print off the form and physically sign.
- b. Electronic Signature: Click in the box to use an electronic signature.  
\*Do not sign with an electronic signature until the requisition form is completely filled out – it is not to be signed prior to completion of the form.\*