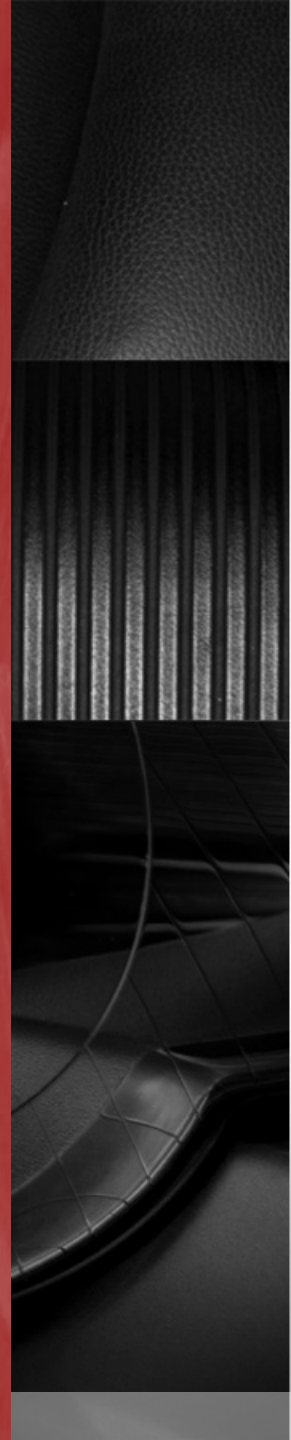
Confirming Order Process and Procedure

Procurement Services



Confirming Order forms are used to pay invoices where the goods/services have already been provided without a requisition or purchase order in place. Only Procurement Services is authorized to commit the University for the purchase of goods and services.

Scenario:

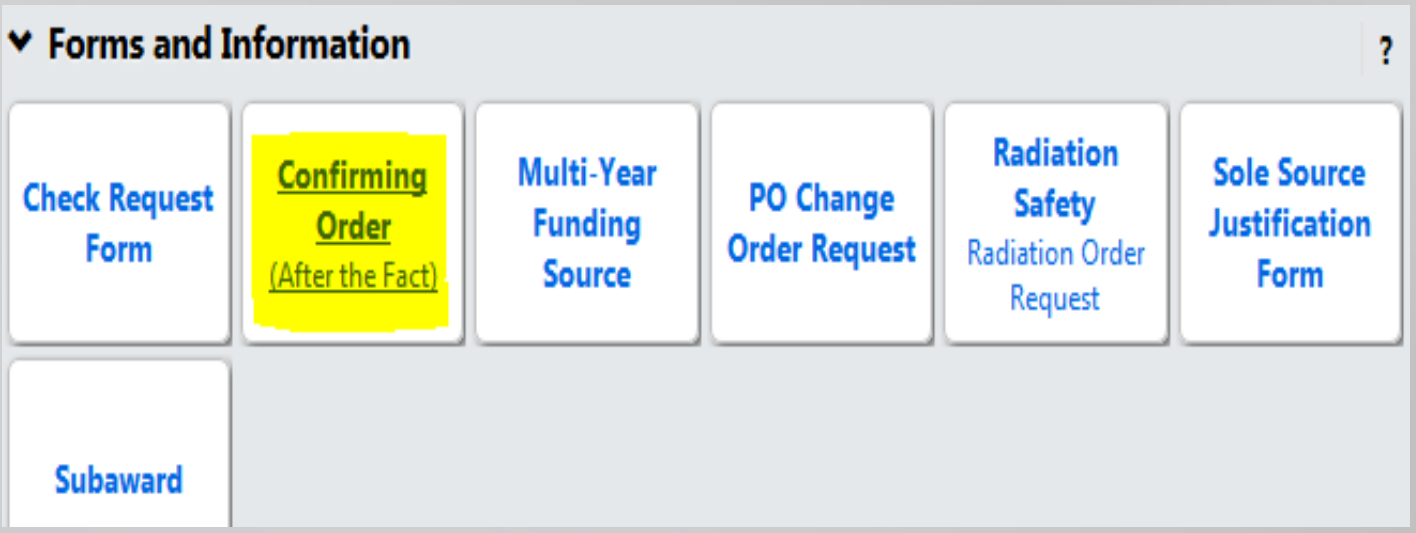
Mary needs to purchase three sandwich trays for a meeting next month. She calls Bob's Deli and orders three sandwich trays. Bob delivers the trays and leaves an invoice requiring payment. Mary will now have to complete a Confirming Order form for Bob's Deli payment.

The issue with this scenario is all purchases are required to first go through Purchasing. How would one go about placing this order through the proper channels?

The first option would be for those who have a Purchasing Card, to make this payment with a P-Card for vendors who accept credit card payments. If a P-Card is not available or the supplier does not take a P-Card, the process would be…

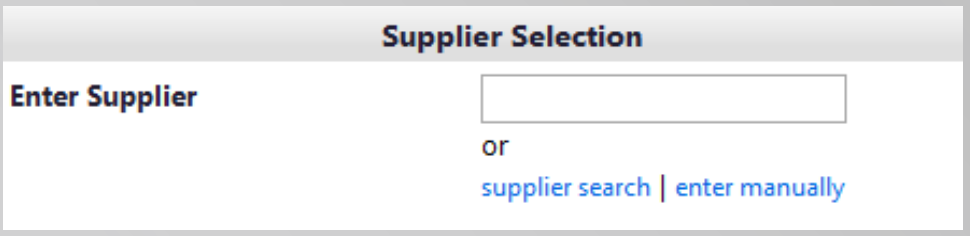
Mary needs to purchase three sandwich trays for a meeting next month. She calls Bob's Deli and request a quote for her order. Mary logs into Smart Source to prepare a non-catalog order and attaches the quote. This order will be routed through the approval process and funds will be encumbered for the amount of this order. Once the order is delivered, Bob's Deli will submit the invoice to drexel university@edmamericas.com for payment. The invoice will be keyed and scanned into the Smart Source system. Mary will receive a notification for Invoice approval. Once Mary approves, the invoice will be processed by Accounts Payable for payment.

Once you have determined the Confirming Order is the proper form for payment, select the Confirming Order Form in SmartSource:



The Confirming Order form contains two sections:

- **Request Info:**
  - In this section, you will provide:
    - Supplier Name



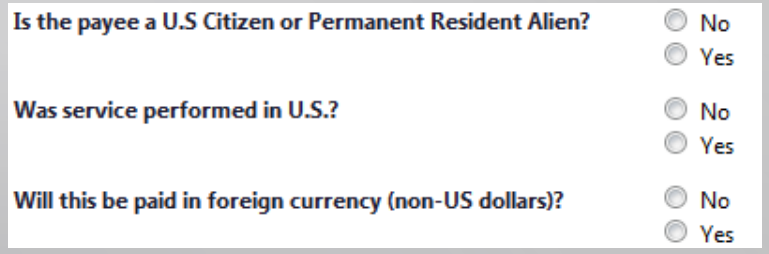
Please refer to the Entering Supplier Manually Job Aid if your supplier's name does not appear in the search

The Confirming Order form contains two sections:

- **Request Info:**
  - After The Fact Justification
    - This is where you will explain the circumstances for making this purchase outside of the Smart Source system.
  - Supplier Invoice Number
  - Invoice Date

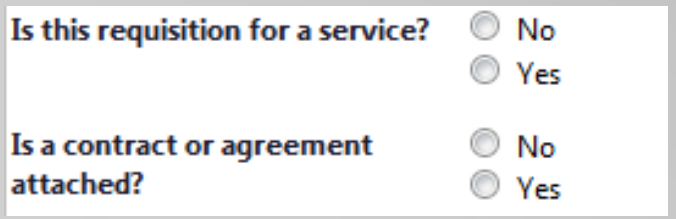
The Confirming Order form contains two sections:

- **Request Info:**
  - Supplier Questions
    - If the payee is not a US Citizen or Permanent Resident Alien and service was performed in the United States, you will need to submit this payment on a paper check request and email it directly to the Tax Office at taxdept@drexel.edu.
    - If the payee is not a US Citizen or Permanent Resident Alien and service was performed outside of the United States, a Foreign Source form is required to be attached to your SmartSource check request. Contact the Tax Office at 215-895-6880 for more information.
    - Payments in foreign currency cannot be made via a SmartSource Check Request. You will need to submit a paper check request to acctpay@Drexel.edu.



The Confirming Order form contains two sections:

- **Request Info:**
  - Contract/Service Questions
    - If the requisition is for the payment of a service, please select yes.
    - If the requisition has an associated contract or agreement, please select Yes and ensure the document is attached to the form.



  - Internal Attachments
    - This section requires you to upload your invoice

Please Note: Not attaching documentation in this section will cause an error in the checkout process

The Confirming Order form contains two sections:

- **Items Purchased After the Fact:**
  - In this section, you will enter the:
    - Description
    - Price
    - Quantity

Items Purchased After The Fact (ATF) ?

Description	Price	Quantity	Ext. Price
test	500.00	1	500.00
			0.00
			0.00
			0.00
			0.00

Once the form has been completed, submit the form to your cart for checkout. At this point you can proceed with the checkout process and submit your requisition.