

Gateway FlexCard Authorization Form Instructions



Where is the form located?

- On the Gateway home page; under forms.

The screenshot shows the UC Santa Barbara Gateway website interface. At the top, the header reads "UC SANTA BARBARA GATEWAY". Below the header, a breadcrumb trail indicates the current location: "Shop > Shopping > Shopping Home > GATEWAY SHOP".

The main content area is divided into several sections:

- Office Supplies, Print Solutions and Furniture:** This section contains logos for Amazon, Office DEPOT, UCSB Bookstore, Ergonomic Favorites, and tangram.
- Computer Hardware / Software:** A section with a dropdown arrow.
- Medical /Clinical /Lab:** A section with a refresh icon and a question mark.
- Medical / Clinical / Lab Supplies:** This section contains logos for Airgas, ABCAM INC, BECKMAN COULTER, BIO-RAD, Cell Signaling, eppendorf, Fisher Scientific, Genesee Scientific, GETINGE, illumina, ThermoFisher Scientific, and MEDLINE.

On the right side of the page, there is a "Forms" menu with a refresh icon and a question mark. The menu items are:

- Animal Tissue
- Confirming PO Form
- Contract Request Form
- Contract Amendment Form
- Vendor Blanket
- VB Request Form
- Flexcard Authorization** (highlighted with a red circle)
- FLEXCARD
- UPS Shipping Form
- Walk In PO
- UCSB Cloud Services

Additional sections on the right include "Supplier Flags" (with text about rigorous assessments), "Promotions" (with a logo for UC Santa Barbara Transport Partnership), and "Help & Resources" (with links for Amazon HELP and Procurement).

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- **Steps to process an order:**
- Click the “FlexCard Authorization” form on the Gateway home page.
- The form will pop up as a new window in your browser.

Form • Flexcard Authorization Close Add And Go To Cart

General Information



1. Use this form to request Flexcard authorization in **Gateway**. Note: This Form cannot be used for federal orders over \$9,999.99. Please use a standard purchase order for federal orders exceeding this amount.

2. Field names in **bold text** are required.

3. In order to ensure proper handling of your request, you must do the following:

- Enter the **Supplier** you wish purchase your goods from.
- Specify the **Order Placement**

4. List out the items, price, and quantities of the goods you are buying on your flexcard.

5. This form will be routed to the department buyer approver to place the order on Flexcard. Once the request has been processed through the departmental workflow to PO will auto-close preventing receiving/invoicing. On orders over \$5,000 the order will automatically be routed to the Flexcard Administrator for approval.

Do not mix the Flexcard Authorization Form with a catalog or non-catalog order. The Gateway system will automatically return your entire requisition to your draft carts.

Supplier Information

Supplier Name ^{*}

Supplier Contact Name

Supplier Contact Email/Phone

Order Information

Order Placement: ^{*}

Flexcard Holder's Name

Order Items List

Description	Price	Quantity	Ext. Price
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="▲"/> <input type="button" value="▼"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="button" value="▲"/> <input type="button" value="▼"/>	0.00

Total 0.00 USD

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- Enter the Supplier Name, Your contact within the Company (if available), their email/phone number.

Supplier Information		?
Supplier Name	<input type="text"/>	
Supplier Contact Name	<input type="text"/>	
Supplier Contact Email/Phone	<input type="text"/>	

- Select from the drop down "Order placed with ANOTHER flexcard holder."
- You can leave the Flexcard Holder's Name blank as MSI Purchasing will insert the appropriate name depending on who processes the order.

Order Information		?
Order Placement:	<input type="text" value="Order placed with ANOTHER Flexcard"/>	
Flexcard Holder's Name	<input type="text" value="Please select.."/>	<input type="text"/>
Order Items List	<input type="text" value="Order placed with MY Flexcard"/>	
	<input type="text" value="Order placed with ANOTHER Flexcard"/>	

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- When complete, scroll back to the top and select “add and go to cart” from the red dropdown in the upper right corner.
- Complete the shopping cart/requisition through departmental workflow as you would a normal purchase.

Additional information:

- Any order over \$5,000 will automatically route to the Flexcard administrator for approval.
- Note that Gateway will not send any order to your supplier. MSI Purchasing will contact the vendor directly and provide the vendor with credit card information once the flexcard order has been approved in Gateway.
- The official Supplier in Gateway is listed as “Flexcard Supplier” with the Business and Financial Services Contact Information.
- This form is only to be used for authorizations, which is why the supplier is defaulted to “Flexcard Supplier.”
- The form is on it’s own PO number wheel. The PO’s generated from this form will be a 12 digit number beginning with an “F” for Flexcard.
- The form will automatically close preventing duplicate invoicing, and will also not require a receipt.

Showing 1 - 7 of 7 results All Dates Create Quantity Receipt Go

Results per page 500 Sort by: Best match Page 1 of 1 ?

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
✓ F00000000007	Flexcard Supplier	4/10/2013 1:13 PM	38525751	Kristi Reyes	Sent	🔒 Closed No Matches	1,413.45 USD
✓ F00000000006	Flexcard Supplier	4/10/2013 11:18 AM	38641940	Jeri O'Mahoney	Sent	🔒 Closed No Matches	770.60 USD
✓ F00000000005	Flexcard Supplier	4/10/2013 10:46 AM	38609962	Marisa Ortega	Sent	🔒 Closed No Matches	11,253.60 USD
✓ F00000000004	Flexcard Supplier	4/9/2013 2:39 PM	38507692	Anna Hernandez	Sent	🔒 Closed No Matches	432.00 USD
✓ F00000000003	Flexcard Supplier	4/5/2013 1:46 PM	38504707	Andrew Stewart	Sent	🔒 Closed No Matches	26.75 USD
✓ F00000000002	Flexcard Supplier	4/5/2013 10:53 AM	38510275	Kristi Reyes	Sent	🔒 Closed No Matches	939.75 USD
✓ F00000000001	Flexcard Supplier	4/4/2013 4:17 PM	38448135	Patricia Halloran	Sent	🔒 Closed No Matches	6,679.92 USD

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