

## Gateway FlexCard Authorization Form Instructions



### Where is the form located?

- On the Gateway home page; under forms.

The screenshot displays the UC Santa Barbara Gateway website interface. At the top, the 'GATEWAY' logo is visible. Below the navigation bar, there are several category tiles: 'Office Supplies, Print Solutions and Furniture' (containing Amazon, Office Depot, UCSB Bookstore, Ergonomic Favorites, and tangram), 'Computer Hardware / Software', and 'Medical / Clinical / Lab' (containing Medical / Clinical / Lab Supplies with sub-tiles 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, a 'Forms' menu is open, listing various forms: Animal Tissue, Confirming PO Form, Contract Request Form, Contract Amendment Form, Vendor Blanket, VB Request Form, **Flexcard Authorization** (circled in red), FEEDBACK, UPS Shipping Form, Walk In PO, and UCSB Cloud Services. Further right, there are sections for 'Supplier Flags', 'Promotions', and 'Help & Resources'.



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- Enter the Supplier Name, Your contact within the Company, 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 complete that section 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"/>	
Order Items List	<input type="text"/>	



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- When complete, scroll back to the top and select “add to cart and go” and click the orange “go” button.
- 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. They will do that once the order is approved.
- 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

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	<b>Closed</b> No Matches	1,413.45 USD
✓ F00000000006	Flexcard Supplier	4/10/2013 11:18 AM	38641940	Jeri O'Mahoney	Sent	<b>Closed</b> No Matches	770.60 USD
✓ F00000000005	Flexcard Supplier	4/10/2013 10:46 AM	38609962	Marisa Ortega	Sent	<b>Closed</b> No Matches	11,253.60 USD
✓ F00000000004	Flexcard Supplier	4/9/2013 2:39 PM	38507692	Anna Hernandez	Sent	<b>Closed</b> No Matches	432.00 USD
✓ F00000000003	Flexcard Supplier	4/5/2013 1:46 PM	38504707	Andrew Stewart	Sent	<b>Closed</b> No Matches	26.75 USD
✓ F00000000002	Flexcard Supplier	4/5/2013 10:53 AM	38510275	Kristi Reyes	Sent	<b>Closed</b> No Matches	939.75 USD
✓ F00000000001	Flexcard Supplier	4/4/2013 4:17 PM	38448135	Patricia Halloran	Sent	<b>Closed</b> No Matches	6,679.92 USD

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