

GATEWAY TRAINING GUIDE

Gateway FlexCard Authorization Form Instructions



Suggested Form Uses:

- When you need a PO to raise your limit for a one time purchase via the flexcard.
- When you want to take advantage of the Gateway workflow authorizations in your flexcard process.

Where is the form located?

- On the Gateway home page; under Gateway forms.

The screenshot displays the UCSB Procurement Gateway website interface. The top navigation bar includes the user name 'Hannah Morand', a star icon, notification icons, and a currency indicator '0.00 USD'. A search bar is located on the right. The left sidebar contains navigation links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Reporting, Administer, and Setup. The main content area features a search bar with 'Everything' selected and a 'Go' button. Below the search bar, there are links for 'Go to: advanced search | favorites | forms | non-catalog item | trade-in | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. The 'Gateway Forms' section is highlighted with a red circle and contains a grid of form tiles: Vendor Blanket Form, VB Revision Form, Contract Request Form, Contract Amendment Form, Walk-In PO, and Confirming PO. Below this, there are tiles for Flexcard Authorization, Animal Tissue, FedEx Shipping Form, and UPS Shipping Form. The 'Medical / Clinical / Lab Supplies' section is also visible, featuring tiles for Airgas, ABCAM INC, BECOMAN COURTER, BIO-RAD, Cell Signaling, and eppendorf. A red arrow points to the 'Gateway Forms' section, and a red box covers a portion of the 'Notices' section.

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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 if the order will be placed on YOUR flexcard or another Departmental Flexcard holder.
- Designate the name of the Card holder (you can fill in, Hannah Morand, as she is the main Purchasing Buyer in MSII).

Order Information		?
Order Placement:	<input type="text" value="Please select..."/>	
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"/>	

Order Information		?
Order Placement:	<input type="text" value="Please select..."/>	
Flexcard Holder's Name	<input type="text"/>	

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- Enter the description, price and quantity of the items you are purchasing with your Flexcard. (The form is limited to 10 line items you may need to adjust quotes to fit into 10 line items).

Description	Price	Quantity	Ext. Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
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<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00
Total			0.00

recalculate list total

- Attach your quote, as needed or a direct link to the website for the item(s) that you would like to buy.

Additional Information		?
Internal Attachments add attachment...		
Supplier	Flexcard Supplier	
Fulfillment Address	Flexcard Tracking: Business and Financial Services 3203 SAASB Santa Barbara, CA 93106-1150	
Supplier Phone	+1 (805) 893-8025	

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- When complete, scroll back to the top and select “add to cart and go” and click blue “go” button.
- Complete the shopping cart/requisition through departmental workflow, as you would a normal purchase.

Additional information:

- Any order over \$2,500 will automatically route to the Flexcard administrator for approval.
- Note Gateway will not send any order to your supplier noted on the form. It is up to your MSI Purchasing Team to contact the vendor directly and supply the vendor with your 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

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

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For questions regarding use of this form please contact:

h_morand@ucsb.edu