

Placing an Order on Gateway

UCSB Physics Department · Purchasing Cheat Sheet

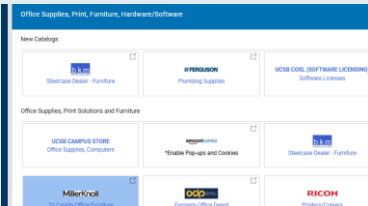
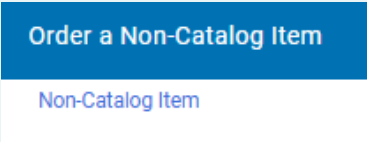
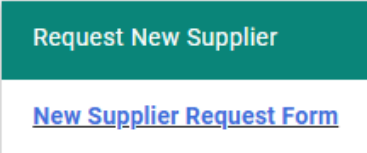
1 Start

- Navigate to the [Gateway homepage](#)



What kind of vendor?

2 Vendor type — three paths

Punchout Supplier	Non-catalog Supplier	Not Yet in Gateway
• Click the company icon • Hosted catalog opens • Add items, check out • Auto-redirects to Gateway 	• Click “Non-catalog Item” • Look up supplier • Enter product, catalog number, quantity, price, packaging • Save & go to cart 	• Select “New Supplier Request Form” • Download & send vendor the Business Information Form • Vendor returns it, plus W-9/W-8BEN, invoice, voided check/bank letter (ACH) 

Returned the paperwork?

If the vendor...	Then...
Returns paperwork / accepts our terms	Fill out the New Supplier Request Form with their documents → vendor added to Gateway → continue as Non-catalog Item.

**Doesn't / credit
card only**

Use Flexcard Authorization instead: add supplier & contact info, description, part #, quantity, price, and a quote → add to cart.

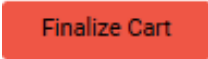
— all three paths continue below —



CART

If not redirected: sidebar → My Carts and Orders → View Carts → open cart

3 Finalize

- Click “Finalize Cart” (top right) — 
- Accounting Codes → pencil icon → enter GL or project CCOA code

QUICK CHECK

Before you submit

- ✓ Each charge/item is on its own line
- ✓ Accounting codes entered, no errors showing
- ✓ Quote attached (skip for punchout)
- ✓ Shipping/handling/tariff added



Assign Cart

Assign Cart to Brianna White

4 What happens next — purchasing office

1. Order prepped (0–1 business days typically; up to 2 at peak times)
2. Submitted for approval
3. Routes through: Purchasing → Finance → PI → other campus offices if needed
4. PO generated once approved
 - Standard order → sent to vendor automatically
 - Flexcard order → placed directly by purchasing in the order they are received
5. Vendor ships the order

6. Received & checked in by purchasing
7. You're notified — ready for pickup

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