



Quick Reference Guide: CFI Orders

CFI (Canadian Foundation for Innovation) funded purchases require additional information to be included on Purchase Orders for tracking and reporting purposes. This guide contains instructions on how to place an order funded by a CFI grant.

Pre-spending:

Procurement of goods begins once the CFI contract is executed and a project account activated. Only under exceptional circumstances can advance spending begin prior to receiving a contract. All risks associated with such action are the responsibility of the PI and his/her faculty.

Pre-spending requirements:

- Procurement Policy 2.8 relating to competitive bids must be met before entering a purchase requisition into Mustang Market.
- Quotes must be in the appropriate CFI format if the vendor has provided an in-kind contribution.
- Please contact Research Finance at Extension 85605 to discuss the pre-spending and an appropriate account to use. Many research accounts cannot be utilized for pre-spending.

Creating a Purchase Order in Mustang Market:

Please note that a requisition should only include one quote and one ship-to location.

1. Under the **Forms** section on the homepage, select the CFI Order Form.



2. Enter the order details as required on the form:
 - a. All of the **bold** fields under the Item Details section must be completed.
 - b. The **Net Price** (Educational Price minus In Kind amount) must be entered.
 - c. Enter the quote # in the Product Description or Catalogue No. fields.
 - d. Select a date in the Requested Delivery Date field. If a date is not selected, there will be no expected delivery date communicated to the vendor.

Requested Delivery Date

dd/mm/yyyy

- e. Complete the **Competitive Bid Requirements** section when the value of the order is over \$10K.

f. Attaching a Quote:

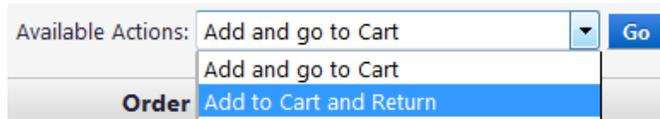
Using the **External Attachments** field available on the Order Form, attach the successful vendor's quote (the vendor quote **must** be in the correct CFI format, including Educational Price and In Kind Amounts). Please note that the quote only needs to be attached once per requisition.

External attachments are for any documents to be sent to the vendor. Please include your CFI quote for the successful vendor.

External Attachments

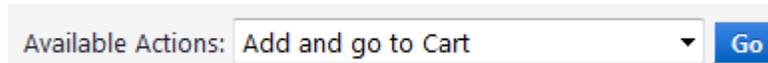
Add Attachments

- g. Complete a form for each line item in the quote where possible. Once one form has been completed, you may select the "Add to Cart and Return" action to add another line item.



The screenshot shows a dropdown menu titled "Available Actions:" with a "Go" button to its right. The menu is open, showing three options: "Add and go to Cart", "Add and go to Cart", and "Add to Cart and Return". The "Add to Cart and Return" option is highlighted in blue. Below the dropdown, the word "Order" is visible in a grey box.

- h. Once you have completed all lines for the order, select "Add and go to Cart" to close the form and go to your shopping cart.



The screenshot shows a dropdown menu titled "Available Actions:" with a "Go" button to its right. The menu is open, showing one option: "Add and go to Cart".

3. Complete and submit your order:

- a. In the top right corner of the shopping cart screen, select Proceed to Checkout. If you have the Shopper role, you will need to select the Assign Cart button instead.

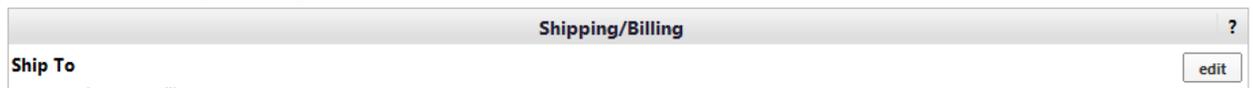
Proceed to Checkout

or

Assign Cart

- b. On the Requisition Summary screen, you will need to add your shipping and accounting information.

- i. Shipping address: To edit your shipping address, click the **edit** button under the Shipping/Billing header.



The screenshot shows a header for "Shipping/Billing" with a question mark icon on the right. Below the header, the text "Ship To" is visible, followed by a small "edit" button.

1. Click on the hyperlink in this box. You will see either "To choose a different address, click here" or "select from org addresses".
2. Search for your department in the Nickname/Address field and select the most appropriate address from the search results.

- ii. Accounting Codes: To add your speedcode and account code, click **edit** in the Accounting Codes section. Enter your 4 digit speedcode and 6 digit account code (i.e. 622000 supplies or 605500 equipment). Click **Save**.

Speedcode	Account	Business Unit	Department	Approval Department	Fund	Program	Project
Required field	Required field	not applicable	not applicable	not applicable	not applicable	not applicable	not applicable

- c. Once you have completed all of the required information, click **Submit Requisition** in the top right corner of the screen.

For further assistance, please refer to our training site: [Training and Reference Guides Website](#)

4. Workflow:

Once a CFI order is submitted, it will flow through the following approval steps before a Purchase Order is created and distributed to the vendor:

- Research Approvals
- CFI Reviewer (Research Finance review)
- CFI Approver (Research Finance approval)
- Procurement Buyer Approver

5. Communicating via Comments Field:

Under the **Comments** tab of a requisition, you may enter a comment or question and select a recipient to receive an email notification that a comment has been posted. This may be used to send urgent requests or questions to Research Finance or Procurement.

Requisition PR Approvals **Comments** Attachments History

Add Comment