



Procurement Services Quick Reference

| Transaction Types & Procurement Methods | Transaction Type | Procurement Method |
|--|---|---|
| | Travel & Entertainment | University P-Card |
| | Goods & Services from an existing supplier | Workday Purchase Order |
| | Goods less than \$2500 purchased from a new supplier that will be used on a one time basis | University P-Card |
| | All other Goods & Services from a new supplier | Workday Purchase Order (complete Create Supplier Request in Workday first) |
| | If asked to sign a Contract | Contact Procurement Services |
| | For any questions call Procurement Services at UBUY (8289) | |

| Obtaining Bids/Quotations | Value | Guidelines |
|----------------------------------|---------------------------|---|
| | Less than \$5000 | <ul style="list-style-type: none"> • No quotations needed • Purchasers should use good judgment and refer to existing supply contracts and Group Purchasing Agreements |
| | From \$5000 to \$10,000 | <ul style="list-style-type: none"> • Two informal, written quotations are required • Informal quotations via email are acceptable |
| | From \$10,000 to \$75,000 | <ul style="list-style-type: none"> • Three formal, written quotations on supplier letterhead are required |
| | \$75,000 and over | <ul style="list-style-type: none"> • Detailed, written scope • Formal bidding process includes a Request for Proposal (RFP) or Request for Quotation (RFQ) • Process managed by Procurement Services |



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Exclusions & Special Situations

The following do not *require* bids & quotations. *
Preferred procurement methods are on the reverse.
For any questions regarding the best way to purchase these items, contact
Procurement Services at UBUY (8289)

*Procurement Services will obtain bids & quotes for these items if requested.

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| Dues & subscriptions | Library resource materials |
| Travel fees including travel agencies, airlines, car rentals & hotels (except charter agreements for buses & airfare) | Booth space at conferences, exhibits, fairs & product shows |
| Utilities | Security & Police Officers provided by local governments |
| Academic testing services & accreditation fees | Drugs & pharmaceuticals |
| Newspaper ads | Insurance |
| Shipping charges | Catering services & expenses related to Wake Forest sponsored conferences, seminars & meetings |
| Training & conference registrations | Contracts for institutions, individuals & businesses named in grant awards |
| Artists, original works of art, photographers, authors, & writers | Advertising |
| Cost of employee recruitment prior to hire | |