

# REQUISITION FORM

The requisition form can be used to make purchases online or to pay an invoice using a credit card. You can find this form at [www.oaklandedfund.org/forms](http://www.oaklandedfund.org/forms).

## STEP 1

Enter your name and email, and the name and the email of the person approving your order.

- If you would like to use your school's funds that are held by the Ed Fund, your principal will approve the order.
- If you are a fiscally sponsored project of the Ed Fund and would like to use your organization's funds, your executive director will approve the order.

Click "Begin Signing" to be taken to the Requisition Form.

## STEP 2

**Please note: you must complete all fields with a red border to submit your form.**

Who are we we making this purchase with?

If you do not see the vendor on the drop down list, select "Other" and enter the vendor here.

APPROVED VENDOR			
Vendor	Other	Officedepot.com	
Account	Supplies	Total Cost	\$ 125.65

What kind of purchase is this?

How much does this purchase cost?

On the next page, click the box to agree to the use of DocuSign signatures and then click "Continue" to unlock the form.

Next, select the name of the vendor you would like to purchase from.

If you would like to make a purchase with a vendor not on this list, select "Other" and write in the name of the vendor in the blank text field.

The Ed Fund has business accounts with several vendors. Please contact Zack ([zachary@oaklandedfund.org](mailto:zachary@oaklandedfund.org)) to see if your school is ready to purchase from approved vendors.

## STEP 3

In the next section, select the name of your school or fiscally sponsored project from the "Fund" dropdown menu. If your purchase is for a specific event or project, select it from the "Project" dropdown. If you are using funds from a specific grant to make this purchase, select the name of the funding source from the "Funder" dropdown. The final dropdown is for Ed Fund use only.

Name of your school or fiscally sponsored project

Fund	African American Male Achievement
Project	Fall Forum
Funder	-- select --
Program (For Ed Fund Use Only)	-- select --

Name of specific project or event this purchase will support

Name of funding source. Leave blank if unknown.

This drop-down is for Ed Fund use only

## STEP 4

In the next section, enter the name, shipping address, and phone number of the person receiving the order. You can also enter a date by which you would like to have these items delivered.

**Please note: While the Ed Fund will submit your order within 72 hours of your form being approved, actual delivery dates will vary depending on vendor shipping schedules.**

SHIPPING INFORMATION			
<b>Name of Recipient</b>	Bridget Daly		
<b>Shipping Address</b> (including city, state, and zip code)	1000 Broadway, Ste 300 Oakland, CA 94607		
<b>Recipient's Phone Number</b>	510-221-6968	<b>Please Delivery By</b>	6/30/17

In the "Special Instructions" field, enter any important information that either the approver or the Ed Fund might need to know. If you have saved a shopping cart on a vendor website, please enter the log-in information here so that the Ed Fund can log in and complete the purchase. If you have not saved a shopping cart and there are no other special instructions, you don't need to complete this field.

## STEP 5

In the next section, please upload a PDF copy of the order you wish to place. Please ensure that the PDF includes the name of the items, the quantity, total price (including shipping and taxes) and the vendor information (URL or contact information).

To upload the PDF copy of your order or other back up documentation:



- click the yellow upload button
- select "Upload" and click "Continue"
- click the "Upload a File" button and select your document
- continue to click "Upload a File" until you have uploaded all required documents, then press "Done"

Finally, review your order. When you are ready, click the "Sign" button, then the "Finish" button in the top right corner or very bottom of the document (after the attachments) to send your form to your approver.

If any required fields are not yet completed, the form will not allow you to select the "Finish" button. In that case, please review the form again to ensure all fields are completed.

If you have any feedback or questions about using this form, please contact Zack Hennessy at zachary@oaklandedfund.org or call 510-221-6968 ext. 707.