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 vendor, 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.
   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](image)

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

- Add Attachments

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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.

```
Available Actions:  Add and go to Cart  
                    Add and go to Cart
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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. **Remember: Only one order should be placed on each requisition (i.e. one vendor).**

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Available Actions:  Add and go to Cart
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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](image) or ![Assign Cart](image)

   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.

      ![Shipping/Billing](image)

      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**.

   ![Accounting Codes section](image)

   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.

   ![Comments tab](image)