

Welcome to Procurify

**STEP BY STEP INSTRUCTIONS
FOR PURCHASE ORDER REQUISITIONS**

The image shows the Procurify dashboard interface. At the top, there is a green header with the Procurify logo and a yellow button labeled '+ NEW REQUEST'. A red arrow points to this button. Below the header is a dark sidebar with navigation options: DASHBOARD, REQUEST, APPROVAL, and RECEIVE (with a '7' notification badge). A dropdown menu is open from the 'REQUEST' option, showing 'Order', 'Expense', and 'Travel'. A red arrow points to the 'Order' option. The main content area displays four summary cards: 'PENDING ORDER REQUESTS' (0), 'PENDING EXPENSE REQUESTS' (0), 'ORDERS PENDING APPROVAL' (0), and 'EXPENSES PENDING APPROVAL' (0). At the bottom, there is a 'RECENT ACTIVITY' section with tabs for 'Orders', 'Expense Reports', and 'Travel'.

1. To begin a new request, follow arrows above.

Procurify + NEW REQUEST

ORDER STATUS > CREATE ORDER REQUEST

ORDER DETAILS

LOCATION [Ⓢ] DEPARTMENT [Ⓢ] DATE REQUIRED*

ORDER DESCRIPTION

+ IMPORT ORDER ITEMS + SUPPLIER PORTAL + ADD FROM CAT/

Order Items List ITEM

ITEM	VENDOR	WHO PURCHASES?	REQUIRE IT REVIEW?	QUANTITY	UNIT	UNIT COST	LINE COS
+ ADD NEW ITEM							




Total Estimated Cost: 0.

NEXT APPROVER*
Sarah Sasso (level 1)
Leamington Departments

2. Enter location, department, date and order description.

ORDER STATUS > CREATE ORDER REQUEST

ORDER DETAILS

LOCATION  Learnington DEPARTMENT  General Clinic DATE REQUIRED* 10/05/2020 

ORDER DESCRIPTION
Monarch Office Supplies



+ IMPORT ORDER ITEMS + SUPPLIER PORTAL + ADD FROM CATALOG

Order Items List [ITEM HISTORY](#)

ITEM	VENDOR	WHO PURCHASES?	REQUIRE IT REVIEW?	QUANTITY	UNIT	UNIT COST	LINE COST
+ ADD NEW ITEM							

Total Estimated Cost: 0.00 CAD

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Sarah Sasso (level 1)
Learnington Departments



3. If you are purchasing from: Medical Mart, Merchants Paper, Monarch Basics Office Supplies select “Add from Catalog” and search for the product. For all other vendors, select “Add New Item”.

ADD NEW ITEM ✕

[← BACK TO CATALOG](#)

CATALOG ITEM DESCRIPTION

PRODUCT NAME*

ACCOUNT CODE*

PREFERRED VENDOR* SKU

HOW MANY DO YOU NEED?


QUANTITY*	UNIT TYPE*	ESTIMATED PRICE*	CURRENCY*
<input type="text" value="1"/>	<input type="text" value="each"/>	<input type="text" value="15.88"/>	<input type="text" value="CAD"/>

ADDITIONAL FIELDS

WHO PURCHASES?*

REQUIRE INFORMATION TECHNOLOGY REVIEW?*

COMMENTS



No files attached (max file size 25.0 MB)

or Drag & Drop files here.

4. Enter/verify that all required fields are populated. If your item(s) were selected through the catalog several fields would have been pre-populated for you. Now click “Add Order Item”.

5. Add additional items as necessary. Once completed click “Submit Request”.

DATE REQUIRED*
10/05/2020

+ IMPORT ORDER ITEMS + SUPPLIER PORTAL + ADD FROM CATALOG


ITEM HISTORY

REQUIRE IT REVIEW?	QUANTITY	UNIT	UNIT COST	LINE COST	
NO	12	each	4.13 CAD	49.56 CAD	...

Total Estimated Cost: 49.56 CAD

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Leamington Departments

RESET FORM SUBMIT REQUEST



ADD NEW ITEM ×


Supplier Portal

PunchOut Suppliers
Browse for items on a supplier catalog and quickly add them to your request.
Once PunchOut items are approved, Procurify will send a PO request to place the order with the supplier.

PUNCHOUT SUPPLIERS

Punchout Items will ship to *

Select a shipping address to continue ▼

 Amazon Canada
amazon.ca WindsorEssexCommunityHealthCentre5453948903 PROCEED

6. FUN FACT!

Procurify integrates directly with Amazon which provides seamless purchasing directly from the site!

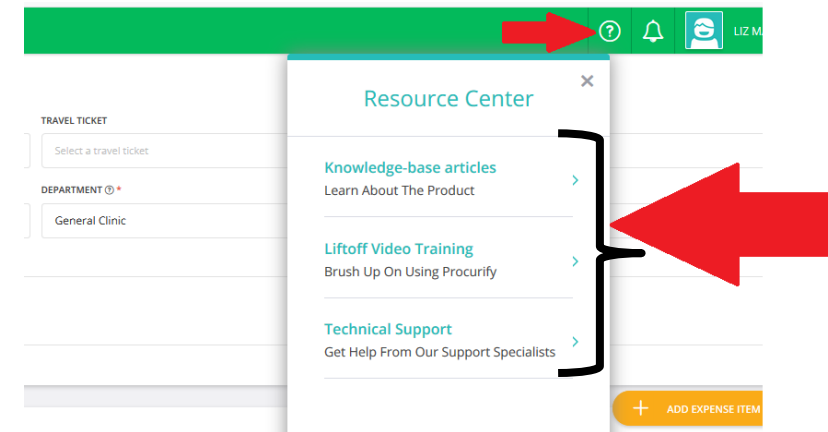
If you are purchasing through Amazon, please reach out to us through our weCHC helpdesk ticketing system for additional instruction.

Help and Support

Several resources are available within Procurify for additional help which can be accessed at the top right hand corner of the home screen.

It includes the following:

- Knowledge-Base Articles
- Liftoff Video Training
- Technical Support



For all other inquiries a procurement helpdesk ticket must be submitted within the weCHC internal staff portal.