When Purchasing Capital Equipment and you have to purchase more than one piece of equipment from a specific vendor and the equipment is equal to or greater than $5,000 each, you must complete a Sole Source and a “non-catalog” together. To make this determination you need to first identify what is Capital Equipment ($5,000 or more) versus Minor Equipment (< $5,000).

1. Looking at your quote you need to first identify Capital Equipment:
   a. Capital Equipment (items $5,000 or more) on your quote.
   b. Be sure to include installation, training and shipping costs in the cost of the equipment. Exclude warranties and software (unless software is valued at $100,000 or more per license).
   a. If “total cost” is $5,000 or greater then you have to utilize the correct accounting code for capital equipment. (Please see reference at the end of these instructions)
   b. Mark these items with a “C” (Capital Equipment) so you will know before starting your requisitions

2. Looking at your quote identify Other items on quote.
   a. Even if you are not purchasing any other minor equipment but quote involves other items that are not to be included as Capital Equipment cost but is included on quote these items will need to be included on the Sole Source form.
   b. Example, other items such as warranty cost, small equipment that is need but not tied to Capital Equipment Cost, etc.
   c. Mark these items “M” (Minor Equipment) so you know before starting your requisition.
Steps to Complete both of these items together:

1. Make sure your active cart is empty.
2. Click on Sole Source Justification under “Showcased Services”
3. Complete the Sole Source form as usual, except only include Line Items that you marked with “M”.
4. When Completed add to cart, when you add to cart your total should match the items you identified on your quote as Non-Capital Equipment
2. Sole Source Form will open and you complete all Required fields.

3. Directions to Sole Source Form can be found here.
Adding Capital Equipment to Sole Source

1. Make sure you see your dollar amounts in your cart that you applied to sole source.
2. Next Click on Home and then on “non-catalog.
3. When non-catalog window appears select the same supplier you utilized on your Sole Source.

When non-catalog window appears you first need to select same Supplier you utilized on
What Account Codes should I use?

733210-Minor Equipment – for non-computer equipment valued at less than $5,000 per item

734025-Computer Purchases – for computers valued at less than $5,000 per item

734020-Computer Software Purchased – for software valued at less than $100,000 per license

739010-739150 - Account Codes in this range are typically used with plant funds (9xxxxx range). If you are not responsible for entering a PR against a plant fund, please do not use Account Codes in the 739xxx range

A complete list of account codes can also be found.....