

HOW TO CREATE A PURCHASE ORDER

1. Fill out a Requisition Form completing all fields at the top.

- Company Name
- Company Address
- Company Phone Number
- Staff – your name
- Department
- Date

2. List items to be purchased – complete all fields

3. Complete all fields at the bottom.

- Account Name
- Account Number
- Date

4. Send the completed Requisition to the appropriate secretary and they will generate a purchase order. Once the purchase order is completed and approved the secretary will email you a copy of the purchase order.

5. Using this purchase order number, place your order. The purchase order number MUST be referenced on your order.

6. When you receive your order, make sure the packing list matches what you have ordered. Send the packing slip with a copy of the purchase order to the appropriate secretary writing “ok to pay” and your signature on either the packing slip or purchase order copy. The secretary will then forward the PO, Requisition, and packing slip to the Business Office.

7. If you receive an invoice write “ok to pay” and your signature on the ORIGINAL invoice and then send it to the Business Office for payment processing.

Please Note: Checks for field trips and cash boxes must be requested 10 days prior to the event.