

Purchasing records

What to put in the binder when you order:

1. Invoice (with cost, ship date, account #, invoice #, etc)
2. A page of specifications, if you're buying equipment
3. A hand-written entry into the "Chronological record" pages

For a credit card purchase over phone/web:

-A copy of the web order is a place holder for the real invoice, which will typically arrive by mail later.

For a purchase (cash or credit card) at a local store:

-Staple receipt to a 8-1/2 x 11 piece of paper, and put in alphabetical records.

For an order using a Purchase order (PO):

-Copy *purchase requisition* and *quote* and put in the alphabetical listings. [Note: they need not be signed before you do this – we just want the order information to be correct!]

What to do when the order comes in:

"Invoice for customs purposes":

...is not the invoice we are looking for. Prices are fictional, and the total billed amount incorrect. **Throw it out!** The *real* invoice (the one printed for billing purposes) is sent separately, and should be in the binder.

Invoice:

- A. If the invoice is for a PO (ie, balance is unpaid), then
 1. COPY the invoice and keep the copy in the binder
 2. sign the invoice with "ok to pay" (if this is true) and
 3. give it to Aloma Namasivayam. (MP308)
- B. If the invoice is from a credit card purchase (ie, paid), then put it in the binder and remove the "place holder" printout, which typically does not have the correct final price, or full account information anyway.

Packing lists:

Check to make sure we got everything on the packing list, and that nothing is "back-ordered". Throw out the packing list after this check.

JHT
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