

CREATING A PURCHASE REQUISITION FROM AN INVOICE

When we receive an invoice and a Purchase Order or payment (i.e. VISA) for labour/materials was not arranged prior to work complete/materials purchased. Ask Manager responsible for the cost centre budget if they would like to pay the invoice on their VISA or if they would like a Purchase Requisition raised. A Purchase Requisition should be raised for invoices totaling \$1,000.00+ .

Create Requisition

Requisition Number: 160842
 Requisition Type: Purchase
 Requisition Date: 2018/01/15
 Created by: LANDRYL
 Year: 2017/2018
 Attn. Buyer: KARMEN YEE
 Purchase Order No:
 Requisitioner's Name: Burke Gulbranson
 Requisitioner's Email: Burke.Gulbranson@viu.ca
 Requisitioner's Local: 6504
 Requisitioner's Building: 120
 Requisitioner's Room: 202
 Requisitioner's Username: GULBRANSB
 Ship To: Nanaimo Campus
 Attention: Burke Gulbranson
 Shipping Note:
 Date Required: / /
 Account Number(s)/Committed Amount(s): 1-8400-410 \$1,764.00

The Requisitioner's Name is the name of the Manager responsible for the cost centre budget.

Input the total dollar value of the invoice.

- This will ensure the exact dollar value of the invoice is committed to the Purchase Order.

Suggested Supplier

Name: BRUCE CAMPBELL
 DRAINAGE PROFESSIONAL
 Street:
 City/Prov/Country: NANAIMO
 Postal Code: V9S 1T9
 Phone: (250) 616-4222 ext.
 FAX:
 Contact Name:
 EMail: brucecampbell52@hotmail.com
 GST Reg: 841444870

Currency: Canadian

Open Order: Start: / / End: / /

Comments:
 (Shown on PO)

Notes:
 (To Purchasing)

Obtain this information from the invoice.

Qty	Units	Cat. No.	Description	Unit Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	Pump clean and dispose of contents 1500 gallons. 300 tank in bad shape for solids.	<input type="text"/>
<input type="checkbox"/> Delete Item?				

Qty	Units	Cat. No.	Description	Unit Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	Work already complete, per invoice 2421, dated December 14, 2017, in the amount of \$1,764.00.	<input type="text"/>
<input type="checkbox"/> Delete Item?				

Ensure to include:

- That the work is complete or materials/ supplies have been received.
- Invoice number.
- Date of invoice.
- Total amount of invoice.

Qty	Units	Cat. No.	Description	Unit Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Delete Item?				

If you have any files on your computer that provide supporting information for this requisition you may include them by clicking on the "Add Attachment" button below. If the information is in an Outlook mail message you may attach it by doing the following:

- Open the message in Outlook
- Click on "File"
- Click on "Save As..."
- In the "Save as Type" box select "Outlook Message Format (*.msg)"
- Save the message (take note of the Directory and Filename you specified)
- Attach the file you created in the steps above to the requisition

Scan a copy of the invoice and attach to the Requisition.

Add an Attachment

Requisition Number: 160842

Attachment Description

(Please enter a short description of the contents of this attachment, such as "Quotation #1234" or "Product Specifications")

File to Attach

(Enter the full path to the file you wish to attach, or search for it by clicking on the "Browse" button)

ATTACHMENTS

Description	Date Attached	Size	Format
INVOICE 2421	15-JAN-2018	215KB	Document (Adobe PDF) <input type="button" value="Open"/>

Prices Are:

Date of Quote: /

All relevant documentation must be sent to Purchasing. Electronic documents may be attached to the requisition using the "Add Attachment" button. If sending hard-copy documents note requisition number on document.

[Return to Requisition Create/Modify Page](#)

[Return to Requisition Maintenance Page](#)

VANCOUVER ISLAND UNIVERSITY Canada V9R 5S5

Req No: 160842

Supplier: 017033
ERICE CAMPBELL
GRADUATE PROFESSIONAL
NANAIMO
V9S 1T9

Requisition Date: January 15, 2018
Ship To: Nanaimo Campus
500 Fifth Street
Nanaimo, BC
V9R 5S5
Attention: Burke Gulbranson

Quantity	Cal. No.	Description	Unit Price	Amount
		Pump clean and dispose of contents 1500 gallons, 300 tank in bad shape for solids		
Work already complete, per invoice 2421, dated December 14, 2017, in the amount of \$1,764.00				

INTERNAL INFORMATION (NOT ON PURCHASE ORDER)

Created by: LANDRYL
Buyer: KARMEN YEE (YEEK)
Status: Not yet submitted to Purchasing
Year: 2017/2018
Prices Are: Estimated
Deliver:
Requisitioner: BURKE GULBRANSON
Requisitioner Email: Burke.Gulbranson@uvic.ca
Requisitioner Username: GULBRANSB
Requisitioner Local: 0554
Requisitioner Location: 120 (Facilities Services & Campus Development)/202
Notes:
Cost Centre(s): 1-8400-410-909-10-0-0-00 \$1,764.00

ATTACHMENTS

Description	Date Attached	Size	Format
INVOICE 2421	15-JAN-2018	215KB	Document (Adobe PDF) <input type="button" value="Open"/>

To request approval of this requisition select the approver name(s) from the list below and click on "Submit Approval Request(s)". A requisition can not be processed until all the account codes have been approved by someone with an appropriate level of signing authority. Account codes shown in red require approval.

If you have signing authority for the cost centre(s) you may approve the requisition by selecting your name in the "Request Approval by" box and clicking on "Submit Approval Request(s)". If your name already appears in the "Approved/Awaiting Approval by" column you do not need to select it again, just click on the "Submit Approval Request(s)" button to approve the requisition.

When all the cost centres have been approved the requisition will be submitted to Purchasing for processing

Account Code	Amount	Status	Approved/Awaiting Approval by	Request Approval by
1-8400-410-909-10-0-0-00	\$1,764.00			BURKE GULBRANSON (65,000 Limit)

After adding the invoice, create the Requisition.
Send to the Manager responsible for the cost centre budget.

Write the Purchase Requisition number on the invoice.
Give the invoice to the Manager to sign to approve payment.
Send invoice to Accounts Payable.

FAC

616-4222

BRUCE CAMPBELL
Drainage Professional
743 Cadogan St.
Nanaimo, B.C. V9S 1T9

INVOICE # 2421
DATE DEC 14/17

RECEIVED
JAN 03 2018

HOURS	WORK DONE	AMOUNT
	Pump CLEAN AND DISPOSE OF CONTENTS, 1500 GALS. 300 TANK IN BAD SHAPE FOR SOLIDS.	1680 ⁰⁰
	PO # 108830	

CUSTOMER MAILING ADDRESS:
 NAME: U.I.U.
 STREET: 325 - 300
 CITY: NANAIMO
 PHONE: _____

COPY
 G.S.T. # 84144 4870 RT0001
 TAXES 84⁰⁰
 TOTAL 1764⁰⁰

APPROVED: _____
 Goods or Services Rec'd. Yes
 Signature: _____
 Local: _____ Return by: _____
 A/P Ria (2205)

Burke - I think we should create a separate PO for this work. OKAY.
 If not, I can put it on the open PO, but the PO will be overspent, so I'll send you and increase.

PO #: 280 160842 FSCD Manager: 86
 Cost Centre: 1-8100410
 Work Order #: 108830 2 CB
 Copy Invoice To: _____

COPY