

Purchase Process Flowchart

I want to purchase goods / services

Consider the following;

- What would I like to purchase?
- Who is the supplier I will use is?
- What is the total cost?
- I need the purchase because?
- The budget being used is? The Budget Holder is?

Speak to the budget holder to request approval, in principle, for the purchase

Decide the purchasing method you will use. The preferred method should **always** be by Invoice except in extenuating circumstances

Invoice

Speak to the Office Manager to request a **Purchase Order** from the Budget Holder.

Give the Purchase Order to the supplier when ordering the goods or service.

Place the Order

- Receive the goods / service
- Immediately refer any discrepancies directly to the supplier

Complete Goods Received Note

School Credit Card

Speak to the Office Manager to request the use of the Credit Card

Pay for the goods / services using the school credit card

Place the Order

Personal Funds

Complete a **Personal Expense Claim form**. Ask the Budget Holder to sign the form.

Pay for the goods / services using your own funds. Retain all receipts/VAT receipts and attach them to your claim form.

Failure to follow these instructions will delay your claim or may result in your claim being refused.

Place the Order

Submit your completed and approved claim form to the Ebor Finance department with receipts attached.

Payment made by Ebor Finance Department