

PURCHASE ORDER FLOWCHART

1a WRITE If in Office

1. **Using the correct PO book write PO. It must include the following:**
 - All supporting documentation (quotes, agreements signed by both parties)
 - Date and details of event/ activity /catering / equipment
 - Acc code & Deliverable Code
 - GST if applicable
2. **Requesting Officer & Operations Manager to initial**
3. **Scan and save PO & attachments in [08 POs in the Finance Mailbag](#) folder**

Name like this:

PO No_Supplier_YYYYMMDD_Code_Officer Initials

Eg: ZB123456_Bodd Diesel Services_20200622_6-6643_HP

FINANCE TEAM

Electronic POs only (Finance does not process paper POs)

1. Checks that all above steps have been followed
2. If the **Operations Manager** has not initialled the PO put in their Approvals folder for their initials
3. Saves PO in CEO's Authorisations folder once the **Operations Manager** has initialled the PO

1b WRITE If NOT in Office

1. Email all details to your supervisor (see 1a for information required)
2. Your supervisor will approve (or otherwise) the PO **via email** copying **Admin Officer** into their response
3. **Admin Officer** will write out the PO (from the very clear and accurate info you provided in your original email), and **scan and save** in [08 POs in the Finance Mailbag](#)

Name like this:

PO No_Supplier_YYYYMMDD_Code_Officer Initials

Eg: ZB123456_Bodd Diesel Services_20200622_6-6643_HP

OR put PO book into CEO's pigeon hole with the email trail attached

4. Account Code & Deliverable Code for NLP2 projects must be provided

FINANCE TEAM

Electronic POs only (Finance does not process paper POs)

1. Checks that all above steps have been followed
2. If the **Operations Manager** has not initialled the PO put in their Approvals folder for their initials
3. Saves PO in CEO's Authorisations folder once the **Operations Manager** has initialled the PO

2 APPROVE

APPROVING OFFICER (Operations Manager)

1. **Reviews and Approves** by signing the PO before the CEO authorises (see No 2 in **1a If in Office**)
2. Approving Officer to direct any queries to Officer who wrote the PO

Leave the PO here for Finance to process

FINANCE TEAM

Electronic POs only (Finance does not process paper POs)

1. Checks that all above steps have been completed
2. Saves PO in CEO's Authorisations folder

3 AUTHORISE

CEO

1. **Reviews and Authorises** Purchase Orders saved in [14 Authorisations\Jane](#)
2. **Queried** Purchase Orders to be held in [14 Authorisations\Jane\00 Jane Queries](#)
3. **Email** appropriate officer for further information

FINANCE TEAM

1. Enters PO details in current Activity Report
2. Adds APPROVED stamp, a tick ✓ and their initials to top right hand side of PO
3. Saves the PO in the appropriate Acc Code folder in the current year Purchase Orders folder
4. Advises the **Requesting Officer** via email that the PO has been authorised and includes a link to the PO

Only use this PROCESSED PO for sending to supplier & attaching to invoices