Quick Reference Guide: Invoice Attached Form

The Invoice Attached form may be used when requesting payment for an invoice where a Purchase Order has not been issued. This should only be used for specific scenarios, including the following:

- Registration or Membership Fees
- Reimbursement to Company or Affiliates
- Urgent Request to Vendor
- Deposit or Advance Payment Required

Please note that only one invoice should be submitted per requisition. **If the invoice requires different tax rates to be applied, separate lines/forms must be created for each tax scenario.**

1. Enter the information from the invoice under the **Invoice Details** section.

   - *Enter Vendor*
   - *Currency*
   - *Remit To Address*
   - *Invoice Details*:
     - *Invoice Amount (excluding taxes)*
     - *Supplier Invoice No.*
     - *Invoice Date*
     - *Product Description*
     - *Catalogue No.*
     - *Commodity Code*
     - *Quantity*
     - *Packaging (UOM)*
     - *Payment Terms*

   **13% tax is automatically added to the requisition. If this is incorrect, a tax exception needs to be indicated in Internal Notes. This number must be identical for all forms/lines which relate to the same invoice (i.e. where multiple lines are added for different tax rates).**
2. If a vendor cannot be found in the Enter Vendor search field or if there is a change to a vendor’s address, then the New Vendor Details section must be completed. Please enter as much information as possible so Procurement can create a complete vendor profile.

3. A copy of the invoice must be attached using the Internal Attachments field. In addition, a Reason Code must be selected from the drop-down menu and an Explanation entered in the text field on the right side of the form.

   Note: Only the codes listed will be accepted as reasons for using this form.
4. If the order value is greater than $10k (before tax), then the **Competitive Bid Requirements** section must be completed. In the drop-down menu, select one of the options to indicate if you obtained the necessary quotes or if you have an exception for this order. In the text field available, enter the information that is requested, based on your selection.

5. When the order details are complete, select an action from the **Available Actions** drop-down menu.
   - To complete and submit your order, select the **Add and go to Cart** action.
   - Use the **Add to Cart and Return** action when you would like to add another line item to your order.

6. **Workflow:**
   Once this order is submitted, it will flow through Departmental Approval and then will be routed to Procurement. A Purchase Order will be created but not distributed to the vendor.
   Note: This form cannot be submitted with any other type of form or order due to the unique nature of the workflow.

   *Please note that 13% tax is added to the requisition. If this amount should be different, please note the tax exception in Internal Notes.*