

Purchase and Receipt of Project Materials

Purpose: Create a trackable request process for Purchase Orders and material and services orders that will support spend approval and 3 way match to implement financial controls. IWS will not pay invoices without a Purchase Order (PO) created in advance of the order. **Note:** Do NOT release shipments or services to begin without a PO in hand. This will protect the company and our financial liability.

Prerequisites:

- Vendor or Subcontractor Quote
- Cost Code for proper budget allocation
- Special shipping or handling needs
- Desired Physical receipt date or date services will be completed

Process Steps:

1. In your browser go to the IWS.SUPPORT.COM website.
 - a. Select the Purchasing Tab and Purchase Request dropdown
2. Fill in all available fields.
 - a. The following fields are required:
3. Attach your quotes and scope documentation.
 - a. If this needs to be bid or quoted out further please notate that need.
4. Route for approval
5. You will receive a copy of the PO via email when the PO is released to the vendor or subcontractor. Please save a copy as a cross reference to what will be shipped or the services provided.

Note:

- Our Service Level Agreement goal is to have all POs generated within 2 business days of receiving the fully approved Purchase Request. We cannot start without full approval. Orders needing quoted and bid will be completed in 5 business days.
- Approvers: You are attesting that this spend, source, value, Cost Code and purpose are within budget and if not, the necessary approvals with Sr. management are already in place.

Receipt of goods or services:

1. Bill Of Lading Verification- Before unloading pallets validate the number of handling units or skids you are signing for on the Bill of Lading (BOL).

- a. Make sure the order is for your project.
 - b. Notate any damaged, distorted boxes or cases on the BOL. This reserves our right to make a damaged goods claim.
 - c. Sign, date and enter the time.
 - d. Keep a copy of the BOL and send a copy with the Packing slip.
2. Packslip verification
- a. Circle the quantity of each item received.
 - b. Print your name, sign and date
 - c. Make notations of any variances. DO NOT cross out or cover ANY printed details.
3. Email the Packslip and BOL to the [Project Coordinators](#)
- a. **Subject line:** PO Receipt, Vendor name
 - b. Keep a copy in your project records
4. Variances in shipments vs packslip
- a. Damaged goods:
 - i. Never let a driver leave without noting damages on his copy of the BOL.
 - ii. If there is damage or potential damage to the load YOU MUST NOTATE ON THE BOL AND NOTIFY both the Project Coordinators and the Buyer IMMEDIATELY. Our recourse to resolve this is dependent on YOUR prompt actions!
 - iii. Send pictures in high resolution.
 - iv. PCs and the buyer will notify the supplier and work to resolve the damage.
 - v. Do not assume the material is trash. The supplier or shipper needs to be able to reclaim their material without further damage. They own that material.
 - b. Quantity variances vs Packslip quantity
 - i. Write neatly the actual quantity received on the packslip.
 - ii. Do NOT write OVER any other information.
 - iii. Notate if you want to keep or return the excess quantity.
 - iv. When emailing the packslip to the PC's please note in the body of the email that there was a variance to the packslip and what you need performed such as return or to keep the material.
 - v. Protect the material from damage or loss until it can be returned to the supplier.
 - vi. Label the material with our PO# and the packslip #
 - vii. Attach a copy of the original packslip when returning to the supplier and keep one for your records showing the date and method of return. If a

company driver picks up the material please have him sign and date the copy.

5. Receipt of **Services**

- a. It is not normal for services contractors to provide packslips. If a copy is provided, please perform the same steps as with a physical material shipment. Circle what service was received or performed, sign, date and email to PC's using the same email subject format.
- b. If a contractor completes services for your project please ask for a signed statement of work completion with a date. This will act as a packslip. By sending us this document YOU ARE VALIDATING that all services have been performed as contracted and in full. We will pay with that validation!
- c. The AP department may receive an invoice for services work directly from a Supplier. We MUST have your verification that the service was performed per the invoice. We will email it to you for your review and approval.
 - i. We need you to review the invoice for accuracy, sign, print your name, date, date the service was performed and list the time.
 - ii. Send it back to the PC's via email with the same subject line as a material order: **Subject line:** PO Receipt, Vendor name.
 - iii. Please respond to these requests within 48 hours as we are trying to minimize the backlog of open invoices and to help with on-time payments to our suppliers.