Supply Order Scenario – Chronological Narrative of Steps

1. Customer: Inspect the Supply Cabinet to determine if you have enough supplies. If there are not enough supplies, fill out Funding Approval Form to begin supply ordering process.

2. Customer: Complete highlighted sections on Funding Approval Form (Part A - Funding request ONLY). Enter $100 as Total Requested on form. Route to your supervisor for approval signature. If you receive form back from Supervisor as unapproved, make corrections and re-route.

3. Supervisor: Review received Funding Approval Form Part A. Ensure the highlighted sections of the form are completed. Ensure total requested amount is under $500.

4. Supervisor: If the total requested amount is under $500 and the form is complete, sign Funding Approval Form (Part A) on Supervisor signature line. If not, return to Customer for correction and repeat steps 1-3 upon receipt of corrected form.

5. Supervisor: Route signed Funding Approval Form Part A to Manager. If you receive form back from Manager as unapproved, make corrections/revisions and re-route to Manager.

6. Manager: Review received Funding Approval Form Part A. Ensure the highlighted sections of the form are completed. Ensure total requested amount is under $500.

7. Manager: If the total requested amount is under $500 and the highlighted sections of the form are complete, sign Funding Approval Form (Part A) on Manager signature line. If not, return to Supervisor for correction and repeat steps upon receipt of corrected forms.

8. Manager: Route signed Funding Approval Form to Division Chief. If you receive form back from Division Chief as unapproved, make corrections/revisions and re-route to Division Chief.

9. Division Chief: Review received Funding Approval Form Part A. Ensure the highlighted sections of the form are completed. Ensure total requested amount is under $500.

10. Division Chief: If the total requested amount is under $500 and the highlighted sections of the form are completed, sign Funding Approval Form (Part A) on Division Chief signature line. If not, return to Manager for correction and repeat steps upon receipt of corrected forms.

11. Division Chief: Route signed Funding Approval Form to Customer.

12. Customer: Upon receipt of signed Funding Approval Form from Division Chief, complete quantity and description sections only on Funding Approval Form Part B.

13. Customer: Route Funding Approval Form to Office Technician.

14. Office Technician: Upon receipt of Funding Approval Form from Customer, complete Funding Approval Form, Part B - Order Details (Item Number and Price) using information from attached Supply Catalog. Enter Extended Price, Subtotal, Tax, and Total.

15. Office Technician: Wait till Friday to place a batch order per contract with vendor.

16. Office Technician: On Friday, complete attached Purchase Order form (including Qty, Item numbers, Description, Price, Ext. Price, subtotal, tax, total sections).

17. Office Technician: Route Purchase Order Form, Supply Catalog, and Funding Approval Form (Part A/B) to Buyer. If you receive form(s) back from Buyer as unapproved, make corrections and re-route to Buyer.

18. Buyer: Review Forms. Ensure Purchase Order Form includes Qty, Item numbers, Description, Price, Extended Price, Subtotal, Tax, and Total. If form is complete, approve by adding signature and date to bottom of Purchase Order Form. If incomplete, route form(s) back to Office Technician for correction. Repeat steps 1-2 upon receipt of corrected forms.

19. Buyer: Send Purchase Order Form to Supplier. If form is denied by Supplier, make suggested corrections then re-route to Supplier.

20. Supplier: Review Purchase Order Form. If Purchase Order Form is filled out correctly, send supplies to Buyer along with receipt. If Purchase Order is incorrect, return Purchase Order Form to Buyer for correction.

21. Buyer: When supplies and receipt are received, check for order accuracy. If incorrect, reach out to Supplier for correction.

22. Buyer: If order is correct, route supplies to Office Technician.

23. Office Technician: Upon receipt from Buyer, route supplies to Customer.

24. Customer: Confirm receipt of supplies from Office Technician.

Congratulations! You completed the process!

SERVICES DIVISION
FUNDING APPROVAL FORM

Part A - Funding Request

Category

☐	Contract / LOE
☐	Overtime
☐	Training
☐	Travel
☑	Supply Order
☐	Other:

Information

Date of Request:
Unit: **Lean Training Unit**
Requestor / Ph. No: **123-4567**
Requestor Name:

Estimate

Description: **Office supplies to complete report**

Total Requested: $

Approvals

Supervisor: _____ _____
                 Signature   Date

Manager: _____ _____
                 Signature   Date

Division Chief _____ _____
                 Signature   Date

Procurement Analyst (Buyer): _____ _____
                 Signature   Date

Part B - Order Details

Detail

QTY (minimum 12 items)	ITEM NUMBER	DESCRIPTION	PRICE	EXT. PRICE

JUSTIFICATION / COMMENTS:			
	SUBTOTAL		
	S&H	**NO Charge**	
	TAX 10%		
	TOTAL		

Supply Catalog

Item Number	Unit	Images	Item Description	Cost per unit
OS11915	100 each		Paper Clips	$3.00
OS11921	1 each		Binders	$3.00
OS11501	100 each		Binder Clips	$2.00
OS23076	1 each		File Tabs	$2.00
OS11446	10 each		Highlighters	$3.00
OS11517	25 each		Pens	$5.00
OS11122	100 each		Pencils	$5.00
OS30774	1 each		Erasers	$1.00

SERVICES DIVISION
PURCHASE ORDER FORM

PO Number: 12345

Detail				
QTY	**ITEM NUMBER**	**DESCRIPTION**	**PRICE**	**EXT. PRICE**
JUSTIFICATION / COMMENTS:			**SUBTOTAL**	
			S&H	**No Charge**
			TAX 10%	
			TOTAL	
Procurement Analyst (Buyer) USE ONLY				
Signature		Date		