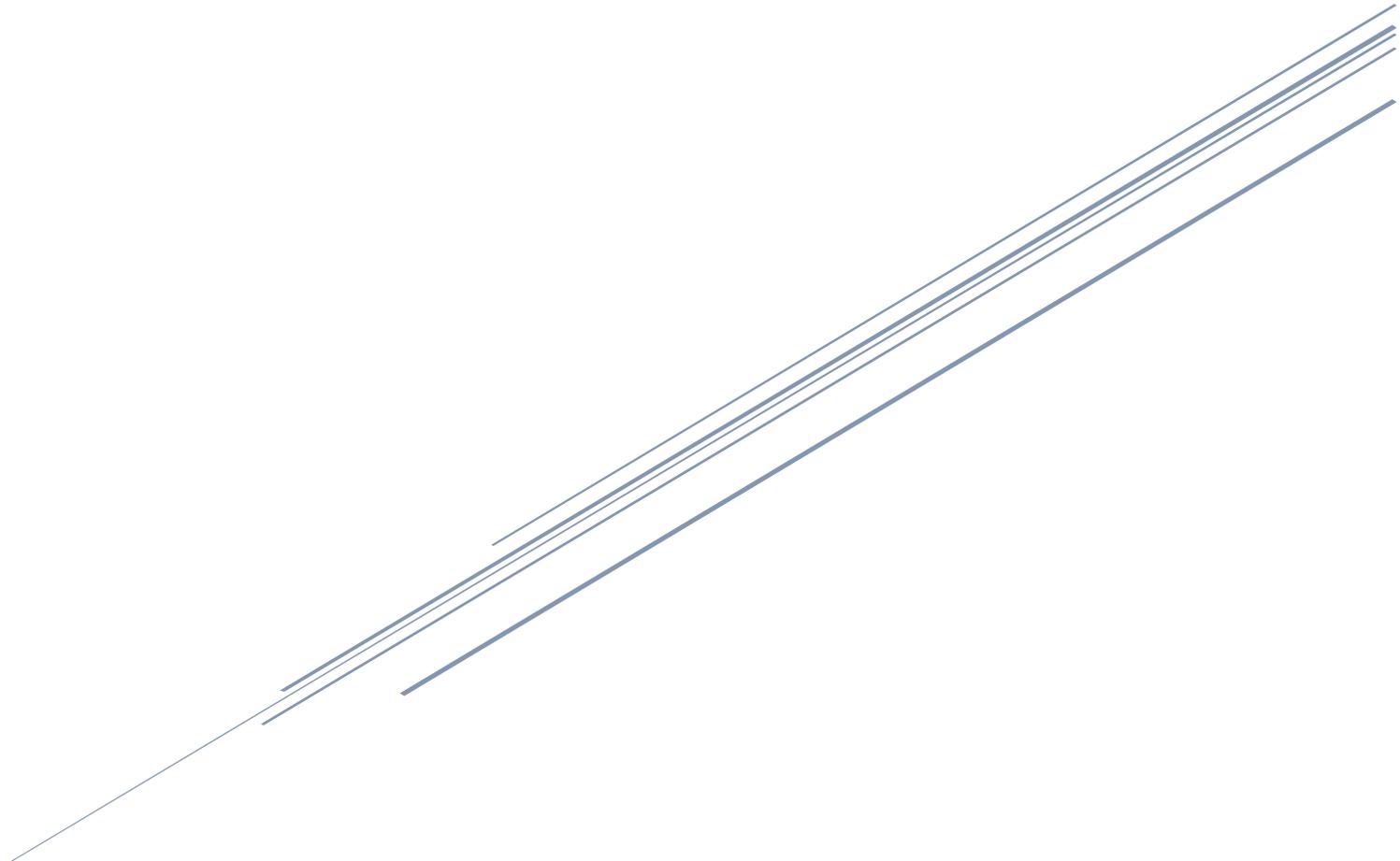


PROCURIFY

Quick Reference Guide



For Questions, Please Contact:

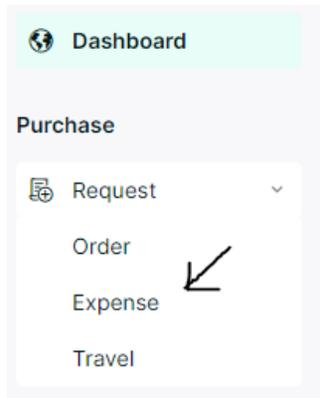
Margie Hennigar: margie.hennigar@afnwa.ca

Derek Allison: derek.allison@afnwa.ca

PROCURIFY

VISA RECEIPTS – WEB VERSION

- Go to Request, then Expense.



- On the next screen, click “Request expense”.
- Attach your receipt and enter the details.

EXPENSE REPORT INFORMATION

TITLE *	<input type="text" value="MacQuarries Pharmasave - STAMPS"/>	TRAVEL TICKET	<input type="text" value="Select a travel ticket"/>
LOCATION ⓘ *	<input type="text" value="HEADQUARTERS"/>	DEPARTMENT ⓘ *	<input type="text" value="CORPORATE SERVICES"/>
PURPOSE	<input type="text" value="Purchase of stamps for mailing <u>cheques</u>."/>		

VISA RECEIPTS – WEB VERSION

- Once the initial details are entered, click “Add expense item”.
- Click on the “File” option to get started.
- Attach your receipt and enter additional information.

YES Need Reimbursement ...



New Expense Item

NO YES

NOTES



Add photo

Subtotal	<input type="text" value="30.69"/>	<input type="text" value="CAD"/>
Tax	<input type="text" value="5.42"/>	<input type="text" value="HST 15% (15%)"/>
Total Cost	<input type="text" value="36.10"/>	CAD

Cancel

Save

VISA RECEIPTS – WEB VERSION

- Once you click save, you will be brought back to the main screen.
- If the details look correct, and the approver is your manager, please click submit.
- You're done!

SUBTOTAL: 30.69 CAD

TAX (HST 15%): 4.60

TOTAL EXPENSE: 36.10 CAD

REIMBURSABLE: 0.00 CAD

NEXT APPROVER *

Chantal LeBlanc (level 1)
CORPORATE SERVICES EXPENSE

Reset form

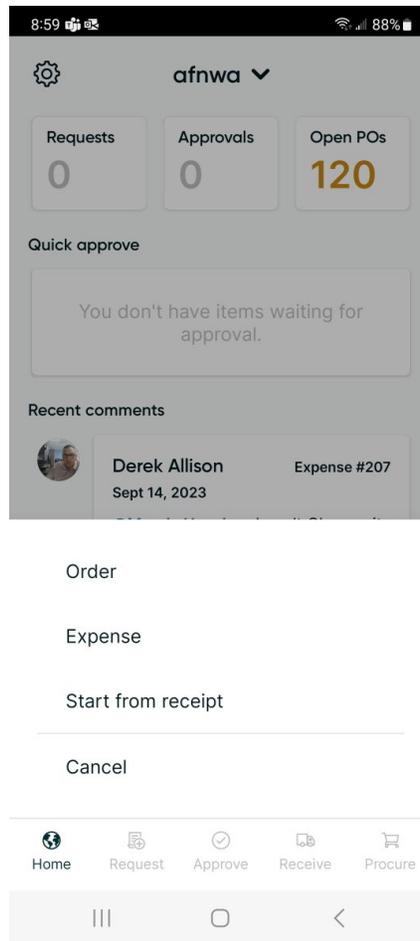
Save draft

Submit



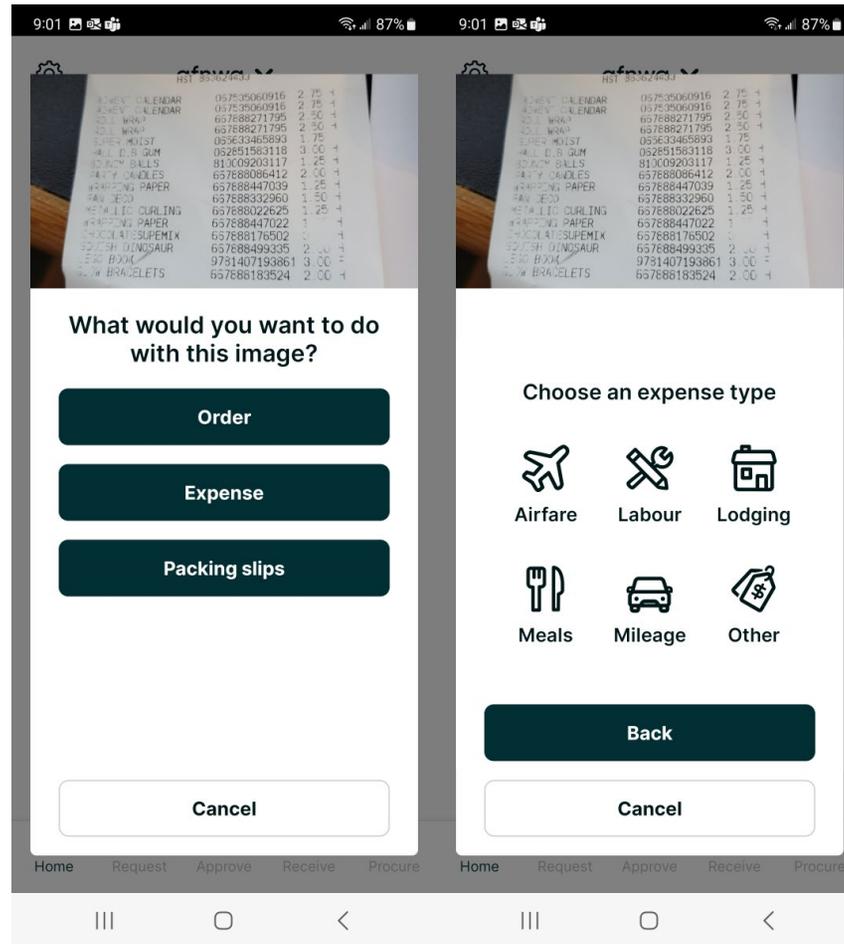
VISA RECEIPTS – PHONE VERSION

- Open the PROCURIFY app on your phone.
- You will start from the Dashboard. If you don't, please click the "Home" button at the bottom left.
- Click "Start from Receipt".
- You can take a photo or upload a file that you already have on your phone.



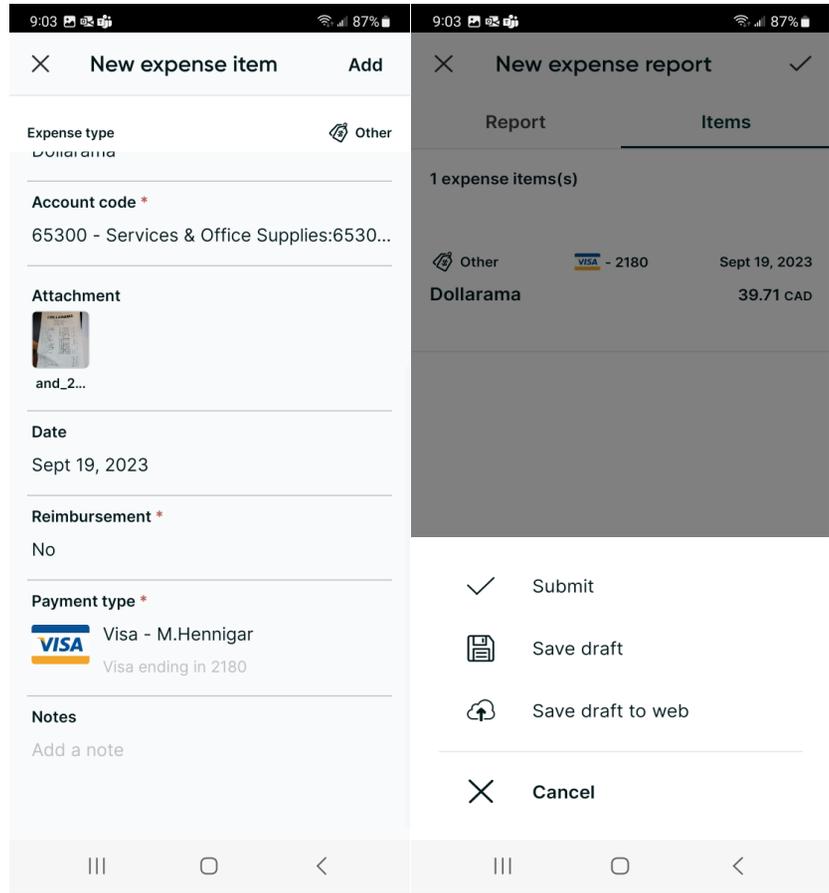
VISA RECEIPTS – PHONE VERSION

- Choose Expense.
- The majority of visa receipts will go in the “other” category.



VISA RECEIPTS – PHONE VERSION

- The next screen is where you will enter the details.
- The reimbursement section should always say “no”.
- There will be the option to choose your visa.
- Click “Add”, then submit. This will go to your manager for review.



EXPENSE CLAIMS

- Expense Claims are entered the same as Visa Receipts, with the following differences:
 - The reimbursable button is Green for yes.
 - There should be a reimbursable amount showing at the bottom.
 - When you're sure the details are correct, click "Submit".

TITLE *
MacQuarries Pharmasave - STAMPS

TRAVEL TICKET
Select a travel ticket

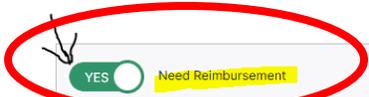
LOCATION ⓘ *
HEADQUARTERS

DEPARTMENT ⓘ *
CORPORATE SERVICES

PURPOSE
Purchase of stamps for mailing cheques.

+ Add expense item

EXPENSES



FILE **VENDOR NAME *** MacQuarries Pharmasave **DATE *** 09/19/2023 **ACCOUNT CODE *** 65280 - Services & Office Supplies:65280 - Postage & Courier **AMOUNT *** 30.69 **CURRENCY *** CAD

SUBTOTAL: 30.69 CAD

TAX (HST 15%): 4.60

TOTAL EXPENSE: 36.10 CAD

REIMBURSABLE: 36.10 CAD

NEXT APPROVER *
Chantal LeBlanc (level 1)
CORPORATE SERVICES EXPENSE

EXPENSE CLAIMS

Items allowed on expense claims:

- Mileage – if you are using your personal vehicle for work-related travel.
 - Current rate is \$0.55/km
- Bridge/Parking/Tolls
- Meal per diems
 - Breakfast – \$17.23
 - Lunch – \$17.04
 - Dinner - \$ 42.92
- Private Accommodations - \$50.00 (staying somewhere other than hotel)
- Incidentals – \$17.30
- Work Boots - \$200 maximum
- Any work-related expenses paid for personally such as memberships, dues, etc.

PURCHASE ORDER REQUESTS – WEB VERSION

- From your Request menu, click Order, then “Request Order”.
- Choose your location. This should auto-default to your community.
- Click “Add item”. This will allow you to enter the details of what you want to purchase.
- Please attach a quote if you have one.

Description CLEAR FORM

PRODUCT NAME *

Excavation Services

ACCOUNT CODE *

64700 - Contract Services:64700 - Trenching & Excavation

PREFERRED VENDOR *

Doug Wilson

SKU

Input a product SKU

One-Time Recurring Blanket

Quantity Unit Type Price Currency

10 Hours 85.00 CAD

Total estimated cost: 850.00 CAD

Additional fields

CLASS

Class

COMMENTS

Doug Wilson digging up water line break on 123 big cove road.



No files attached (max file size 25.0 MB)

Dashboard

Purchase

Request

Order

Expense

Travel

PURCHASE ORDER REQUESTS – WEB VERSION

- Click “Add Order Item”.
- This will bring you back to your main screen to verify your information.
- All order requests go to Gary first, then to James Trimble.
- Click “Submit request”.

Order details

LOCATION  ELSIPOGTOG

DEPARTMENT  OPERATIONS

DATE REQUIRED* 09/26/2023 

ORDER DESCRIPTION

Order Description

[+ Import order items](#) [+ Add from catalog](#)

Order items list [Item history](#)

ITEM	VENDOR	CLASS	QUANTITY	UNIT	UNIT COST	LINE COST	
1	Excavation Services	Doug Wilson	10	Hours	85.00 CAD	850.00 CAD	...

 COMMENT Doug Wilson digging up water line break on 123 big cove road.

[+ Add new item](#)

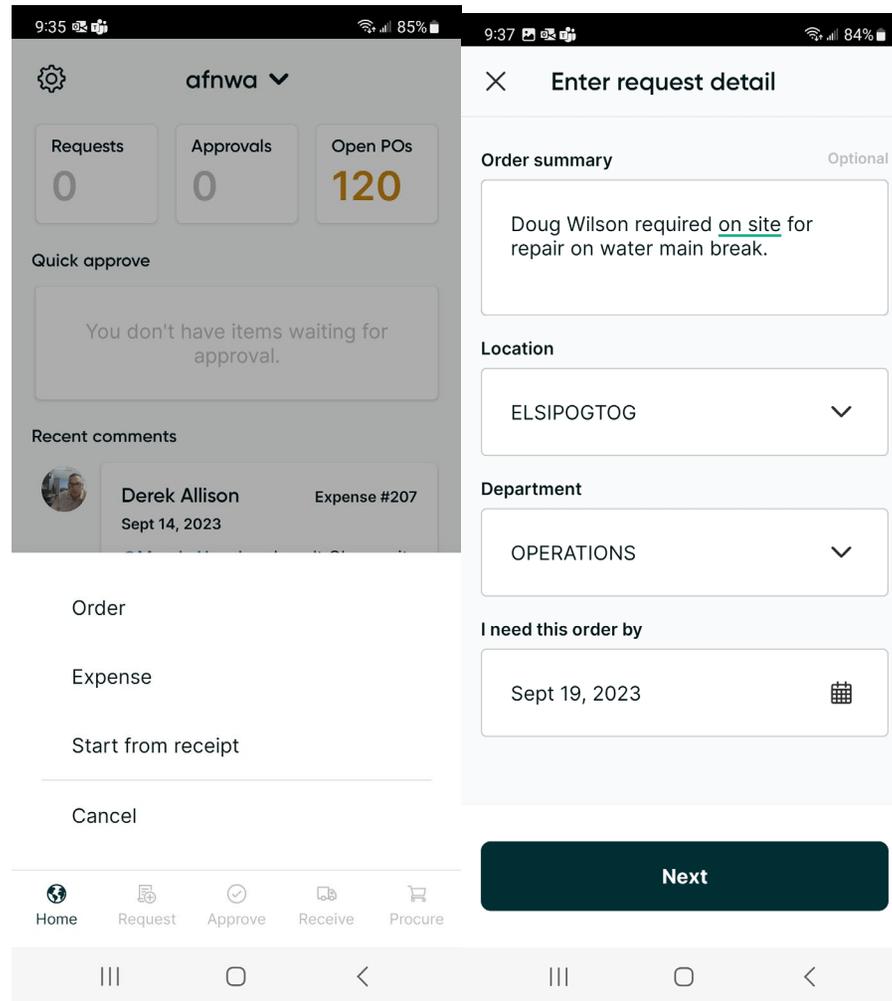
Total Estimated Cost: 850.00 CAD

NEXT APPROVER* Gary West (level 1)
ELSIPOGTOG ORDER

[Reset form](#) [Submit request](#)

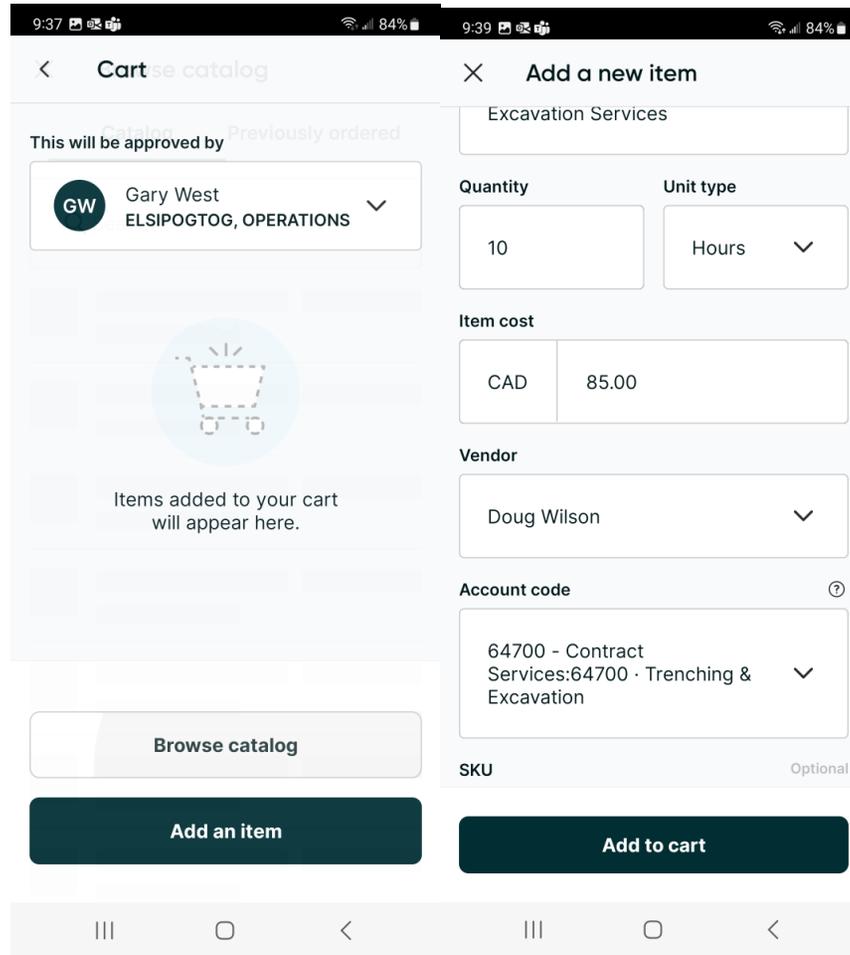
PURCHASE ORDER REQUESTS – PHONE VERSION

- From the Home screen, select Request, then Order.
- The next screen allows you to enter the details of your purchase.
- Click Next.



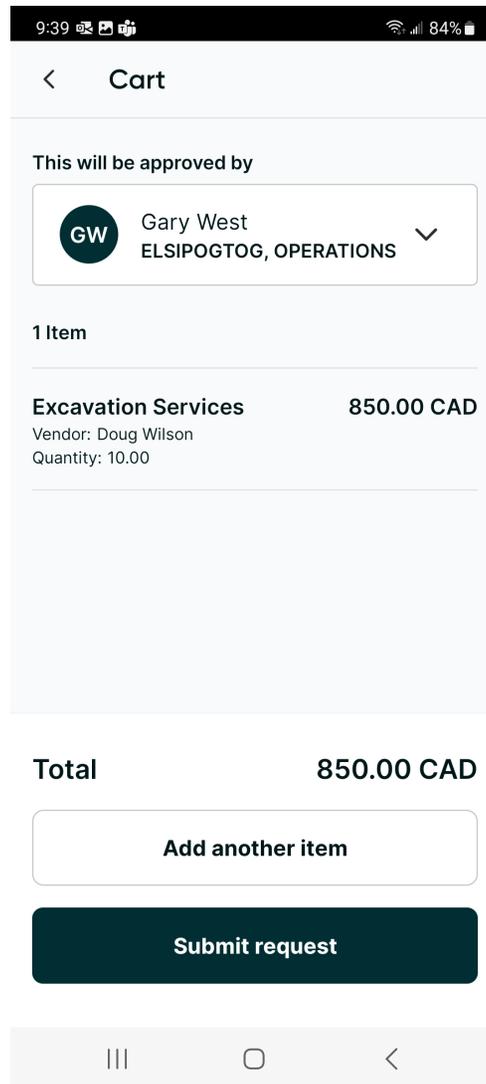
PURCHASE ORDER REQUESTS – PHONE VERSION

- This screen shows who the approver is and allows you to add an item.
- Enter the details of your purchase.
- Click Add to cart.



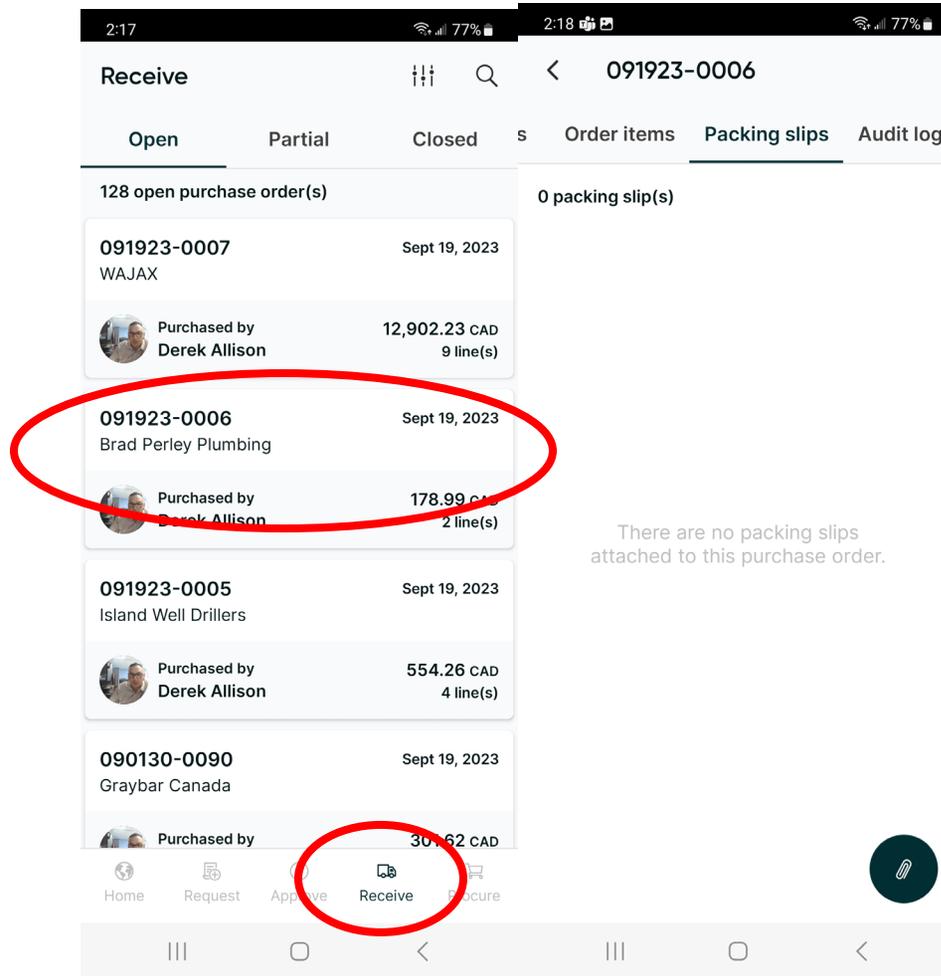
PURCHASE ORDER REQUESTS – PHONE VERSION

- When you are done entering the items for your purchase, click “Submit request”.
- If you require the corporate services department to forward a purchase order to a vendor on your behalf, please indicate that in the notes/comments section. These purchase orders will not be forwarded automatically.



PURCHASE ORDER RECEIVING – PHONE VERSION

- If you requested an item or service for purchase, and it is being sent/performed to your location, you have the ability to “Receive” the item in Procurify.
- From the “Receive” area on your app, you will see all Open, Partial, Closed Purchase orders. Click the one you would like to complete. You can attach the packing slip if it’s goods received.



PURCHASE ORDER RECEIVING – PHONE VERSION

- You can choose to receive all items on the order or select how many items were received.

