



APICS PHOENIX CHAPTER

POLICY NUMBER: 04-050

POLICY TITLE: Ordering from APICS Society - Procedure

REVISION NUMBER: A

DATE: 31 August 2004

1. PURPOSE

The purpose of this procedure is to document how to order materials from APICS Society and have it billed to the Chapter. The purpose is also to document how to make sure the Chapter charge account number (per the Chapter Chart of Accounts) appears on Society invoices to facilitate our bookkeeping.

2. PHILOSOPHY

None required.

3. SCOPE

This procedure applies to Chapter VP's and their designees who order materials from APICS Society. Most items that Society can supply are listed in their Chapter Materials Support Catalog (Stock # 82032) and/or the Educational Resources Catalog (Stock # 01041) which are updated annually. The catalogues can be ordered at no cost from Society.

4. POLICY/PROCEDURE

a. You must do three things before you order.

- 1) Make a list of the items you want and their stock numbers.
- 2) Determine what charge number you are going to use in our Chart of Accounts. This charge number should also match the budget you submitted. You can only have one charge number per order.
- 3) The Chapter billing number. The Chapter billing number is not documented here for security purposes. Ask another VP if you don't know what it is. Usually the VP Education and VP Membership do a lot of ordering.

b. Call APICS Society 1-800-444-APICS (2742) to place the order.

c. Society will first ask you for your APICS membership ID number so have it available. This is for ID and shipment purposes. However, you can request the order be shipped to a different address, if you wish.

d. Next, Society will ask for the Chapter billing number, so that the invoice comes to the Chapter.

e. Finally, Society will complete the order, which provides them with an order number.

f. After you receive the order number, ask the Society representative to put a note into the bill-to address field. There is a note capability in this field but, if you get a new person, he/she may not know about it. Be persistent. Also, this field is not editable to them until AFTER the order number is determined. The note you want

the Society representative to enter is the Chart of Accounts charge number you are charging for the order. For Certification Review courses, you will use the class code (also explained in the Chart of Accounts Policy).

- g. You cannot charge different line items on one order to different accounts. You only have one field in the order for a comment. If you need materials charged to different accounts, you must put them on separate orders.
- h. The individual doing the bookkeeping for the Chapter will get the Society invoice in the mail and see the charge number and won't have to call you for it.
- i. If you are only ordering FREE materials, you don't need to provide a Chart of Accounts charge number.

5. ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

a. Attachment(s)

None

b. Related Policies/Procedures.

04-030 Chapter Chart of Accounts Policy.

6. RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- VP Finance