

Finance Forms – Mobile Phone

Finance Forms can be found via the AskOtago login at

<https://otago.custhelp.com/app/forms/finance>.

This factsheet takes you through submitting a Purchase Form for purchasing a new Mobil Phone.

Choose the form type you require and submit using the "Submit Request" button at the end of the form

Your Details: These sections auto-populate when you login



Finance forms

Your details

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Department	Supply Chain

Your request

Form type

<input type="radio"/> Purchase goods	<input type="radio"/> General invoice
<input type="radio"/> Purchase services	<input type="radio"/> Sundry invoice
<input type="radio"/> International travel	<input type="radio"/> Research invoice
<input checked="" type="radio"/> Mobile phone	<input type="radio"/> Donation invoice
<input type="radio"/> Quote request	<input type="radio"/> Credit note

Your Request:

1. Form type - select "Mobile phone"
2. Mobile Device Policy - see link in info section
3. Order on Behalf of - if this is for another person, or you can use your own details, a mandatory field
4. Supplier – is always Vodafone

Mobile phone

 Ensure you are familiar with the University's [Mobile Device Policy](#).

Order on behalf of *

Mobile account type *

Existing account New account Move an existing personal mobile number into a new account

5. Mobile account type – Depending on your requirements each of these selections will request specific details Vodafone require to proceed with your request

Mobile account type *

Existing account New account Move an existing personal mobile number into a new account

Mobile model *

Existing mobile number *

6. Existing Account – you currently have a Mobile phone account with Vodafone, your phone requires replacing
Mobile Model– a drop down list will provide you a list of phones currently available from Vodafone and the prices including GST
Existing Mobile Number – your current university Vodafone mobile phone number

Mobile account type *

Existing account New account Move an existing personal mobile number into a new account

Mobile model *

 Please specify your current extension if you would like your new mobile number to match it (021 279 xxxx).

Existing extension number

Email to send statements to *

Account codes *

Account code for purchase

GL

PL

e.g. 10.XX.A01

e.g. 3241.00

Account code for billing

GL

PL

e.g. 10.XX.A01

e.g. 3241.00

7. New Account – a new Vodafone account needs to be set up for you with a new number
Mobile Model– a drop down list will provide you a list of phones currently available from Vodafone and the prices including GST
Existing Extension – if available Vodafone for will load the last 4 numbers of your new Mobile phone using your extension
Email to send statements – this is the account you want your monthly statements to be sent to
Account codes – the first is where the your new phone will be paid from, the second where the monthly charges need to come from if different

Mobile account type *

Existing account New account Move an existing personal mobile number into a new account

Mobile model *

Email to send statements to *

Account codes *

Account code for purchase GL
 PL e.g. 10.XX.A01 e.g. 3241.00

Account code for billing GL
 PL e.g. 10.XX.A01 e.g. 3241.00

i Please specify your personal mobile number to be moved into a University account.

Personal mobile number *

Current provider *

Plan *

Prepay On account

- 8. Move an Existing personal mobile number – you have a personal mobile phone number you wish to move over to Vodafone for university purposes
Mobile Model – a drop down list will provide you a list of phones currently available from Vodafone and the prices including GST
Email to send statements – this is the account you want your monthly statements to be sent to
Account codes – the first is where the your new phone will be paid from, the second where the monthly charges need to come from if different
Personal mobile number – your personal number which will is now to become your university mobile contact details
Current provider – i.e. Spark, 2 degrees etc.
Plan – is this number on a plan or has it been prepay

i Start typing your cost centre code or address to choose a delivery point.
You can also specify the address in full.

Delivery address

Notes for purchasing team

Notes for Vodafone

- 9. Delivery Address – start typing department name or cost code and select from dropdown box. You can also manually enter an address
- 10. Notes for Purchasing Team – special notes to the Purchasing Team
- 11. Notes for Vodafone – special notes you want to put on the request being sent to Vodafone

12. Authority – choose how this purchase order has been approved. If you select “Approval attached” or “Budget holder approval via workflow” a field will appear to select the Budget Holder. Each selection will provide a separate Information box providing details

 Please indicate whether you have the appropriate authority to make this purchase.

Authority *

I have authority Approval attached Budget holder approval via workflow

Attach documents (if required)

No file selected.

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13. Attach documents – attach any relevant documents here, they can be any format
14. Submit request – click to submit to the Purchasing Team to process the request. You will receive confirmation that it has been submitted
15. Once the Finance One order is completed and Purchasing have submitted to Vodafone, you will receive an email with the Purchase Order attached and confirmation that it has been sent to Vodafone if that was what you requested
16. Once you have received delivery please advise the Purchasing Team as there is further work they need to do in Finance One for the completion of this request this can be done by simply replying to the email that was sent to you or by updating your request in the AskOtago portal.
17. Upon completion in Finance One, the Purchasing Team will close this Incident.