REAL Journey Academies

Procurify SOP & Instructional Guide

Last Updated: [6/18/25]

This document outlines the standard operating procedures (SOP) for using the Procurify platform to manage purchases, approvals, invoices, and spending cards across all REAL Journey Academies (RJA) school sites.

1. Account Access & Setup

- Confirm with Finance that your account has been set up correctly.
- After confirming your account is active, go to https://www.procurify.com/login/ to access the platform.
- When prompted, enter the company domain: realjourney
- Use the Gmail-prompted login to sign in with your RJA credentials.

2. Purchase Requests (Requisitions & PO Purchase Orders)

- Select the name of the school or site the purchase order is for first.
- Then select the grant associated with the purchase.
- Navigate to 'Requests > New Request'.
- Fill in the following:
- - Vendor (search existing or type 'NEW VENDOR')
- - Quantity & Price
- - Account code (the best description of the item you are trying to purchase or the account code that is in your routing group to allow the approval to trigger)
- - Grant Code: If not using one, enter '0000' unless instructed otherwise
- Add reason or event details in the memo field.
- Attach supporting documents (event flyer, quote, approval forms).
- All coding is important as it determines your approval routing. If you do not see your direct supervisor as your approver, your coding may be incorrect, and you will need to reach out to finance.

3. Approval Routing

- Requisitions automatically route based on site and amount thresholds.
- Supervisors/Principals approve first, then finance if item amount is over a designated threshold.
- If a request is returned, users must revise and resubmit.
- Use the comments section for internal communication.

4. Purchase Orders (POs)

- After approval, a PO is auto-generated.

- Download the PO under 'Orders > Purchase Orders'.
- Email PO and invoice to the vendor if required.
- For Amazon & ODP, items are auto-approved—no manual PO needed.

5. Invoice Submission & Bill Payments

- Submit invoices to realjourney-12405d@invoices.procurify.com and CC e.fieboh@realjourney.org.
- Must include: invoices in PDF format only, PO (if applicable), and event info.
- If a grant, please mention it in the purchase.
- Payments are fulfilled within 10 business days of approval.

6. Spending Card Usage & Reconciliation

- Cards issued must follow this SOP:
- - Use only for pre-approved purchases.
- - Upload the receipt and code the transaction in Procurify within 7 days.
- - Use the grant code or enter '0000' if not applicable.
- Lost or compromised cards must be reported immediately.
- Misuse may result in suspension or disciplinary action.

7. Grant-Coded Transactions

- All grant-related purchases must use the correct code.
- If unsure, contact your supervisor or finance.
- Codes impact state and federal compliance reporting.
- If you cannot find the grant you are looking for, please reach out to finance.

8. Adding New Vendors & ACH Request Tab (For Website Update)

- For new vendors, please reach out to Finance so they can be added to the system.
- When possible, include the ACH information and a non-PO address associated with the business for faster processing.
- Type 'NEW VENDOR' in the email request.
- Email e.fieboh@realjourney.org with:
- - W-9
- - Vendor Name & Contact Info
- - Purpose of Request
- Finance will confirm once added.

9. Mobile App & Field Usage

- Download the Procurify app (iOS/Android).
- Allows quick approvals, receipt uploads, and spend tracking.
- Ideal for staff on field trips or offsite events.

10. Coding for Routing Groups

- Each account code is tied to a specific routing group that determines the path of approval.
- Using the correct account code ensures that your request is reviewed by the appropriate approver.
- If the incorrect code is used, your requisition may route to the wrong individual or stall in the workflow.
- Always verify the correct account code with your supervisor or finance.
- If you're unsure of the routing group tied to your code, contact e.fieboh@realjourney.org for clarification.

11. Support & Help Resources

- RJA Finance Team: e.fieboh@realjourney.org
- For tech issues: support@procurify.com