

**ABC Vendor**

100 Main Street  
San Francisco, CA 94103

Phone 415-555-5555  
Fax 415-555-5556

|             |                  |
|-------------|------------------|
| <b>Date</b> | <b>Invoice #</b> |
| 7/15/2008   | 38493973         |

**Bill to:**

UCSF / Neurology – ALS Research Ctr  
Accounts Payable Box 0812  
San Francisco, CA 94143-0812

**Ship to:**

Attn: Dr. Ravi Sharma (415) 353-2108  
UCSF / Neurology – ALS Research Center  
350 Parnassus Ave, Ste 500  
San Francisco, CA 94117

| Reference                        | PO         | Terms     | Due Date          |
|----------------------------------|------------|-----------|-------------------|
| Ordered by M Smith (415)353-2108 | 12345D1234 | Net 30    | 8/15/2008         |
| Description                      | Quantity   | Price     | Amount Due        |
| Metal Desk, item No. 3837        | 1          | \$ 325.00 | \$325.00          |
| Swivel Chair, item No. 3335      | 2          | \$ 200.00 | \$400.00          |
| Office Chairs, item No. 6544     | 4          | \$ 120.00 | \$480.00          |
| Freight                          |            | \$ 100.00 | \$100.00          |
| CA Sales tax at 8.5%             |            | \$ 117.30 | \$117.30          |
| <b>Total Amount Due</b>          |            |           | <b>\$1,422.30</b> |

**Thank you for your business!**



**Dear Vendor:**

To better serve you by making payments faster and more efficiently, we ask that you read and comply with the following information. We have compiled a list of *REQUIRED INFORMATION* and a list of *BEST PRACTICES* in invoicing. Please give us a call if you have any questions.

UCSF Controller's Office – Accounts Payable Unit  
AP Service Desk 415-476-2126 or [apservicedesk@ucsf.edu](mailto:apservicedesk@ucsf.edu)

**REQUIRED INVOICE INFORMATION**

- ✓ **SpeedChart Purchase Order** on low value invoices (\$2500 and less). Speedchart POs or "LVPO" are 10 characters in length, beginning with the Speedchart itself, which is five digits (but can be alphanumeric...such as 1X545 or 1A465) followed by an alpha character and four department-assigned characters for tracking (e.g. 12345D1234). The first five numbers are the most important to assure payment.
- ✓ **Purchase Orders or UCSF Vendor Contract** numbers for high value invoices (greater than \$2500). Purchase Order numbers (e.g. 0000123456) and UCSF Vendor Contracts (e.g.) 90000XXXXX are 10 characters and always numeric.
- ✓ **Invoice number and invoice date.**
- ✓ **UCSF Ordering and Ship-to Contact Information** is required for UCSF to pay an invoice. We need the name and telephone number of the person who placed the order, and the complete ship-to address.
- ✓ **Bill to information should always be:** UCSF Accounts Payable  
Box 0812  
San Francisco, CA 94143-0812
- ✓ **Sales Tax.** Contrary to popular belief, UCSF is not exempt from paying sales tax on taxable goods, whether or not the seller has charged such tax on the invoice. If the purchase was shipped to us from an out-of-state vendor and does not reflect sales tax, then use tax will automatically be accrued.
- ✓ **Credits** – clearly identify as a "CREDIT" and provide reason for credit. Reference invoice number if a return.

**BEST PRACTICES (nice to have, not required)**

1. Use 8 ½ X 11 size, white paper with black ink. No colored paper.
2. No dot matrix printing.
3. Portrait orientation (not landscape).
4. No spaces, characters, or letters in the invoice number (all numeric).
5. Never handwritten.
6. If taxable and non-taxable items included on same invoice, separate the total taxable and total non-taxable.
7. Include vendor contact information and remittance information.
8. Include vendor EIN or TIN.