



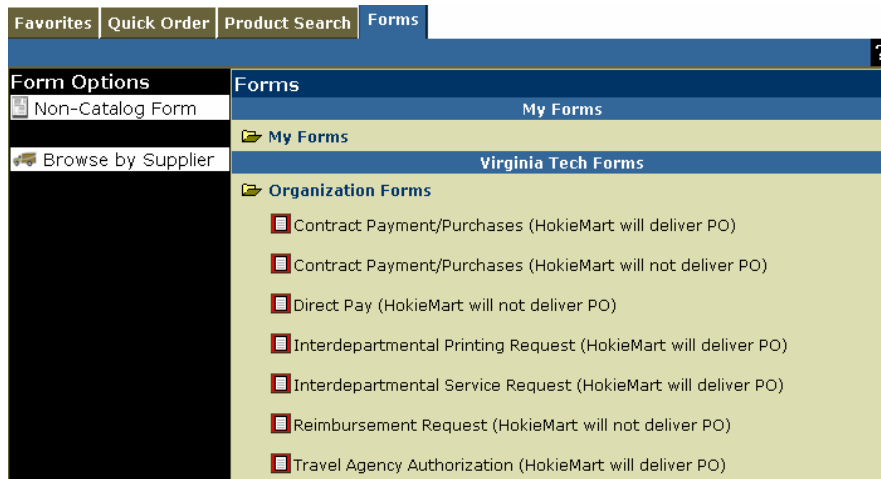
Welcome to the first edition of **The Cart**, the HokieMart newsletter. The Cart will be published on an “as needed” basis and will contain new features/changes in the HokieMart and will serve as a reminder of any functions which may continue to be problems for current/new users. We ask that you read it carefully and print it for your use. The Cart can also be found on the Purchasing website.

New Contract Payment/Purchases Forms

Effective immediately, **two** Contract Payment/Purchases forms will be used in the HokieMart - one form if the **HokieMart will deliver** the PO and another form if the **HokieMart will not deliver** the PO.

CONTRACT PAYMENT/PURCHASES FORM	(HokieMart WILL deliver PO) To <u>purchase</u> new contract items
CONTRACT PAYMENT/PURCHASES FORM	(HokieMart WILL NOT deliver PO) <ul style="list-style-type: none"> • Special Pricing/Quotes from Contract Vendors • Special Delivery Delivery Instructions/Availability with Contract Vendors OR To <u>pay</u> for contract items already received

NOTE: All Virginia Tech Forms now display the HokieMart PO delivery information.



Split Funding Between Multiple Departments

The departmental Requestor enters the order in the HokieMart and populates the “prepared for” field in the cart with the “Shared Department” Requestor. Populate the “prepared for” field by clicking on “select a different user” and then search for the last name of the “Department.”

This PR will be assigned to the “Shared Department” in the HokieMart. It will not be under the Requestor’s department. All Receivers have access to the “Shared Department.”

The PR will be routed to all department Approvers for review. The PR will require an approval for each department that provides funding.

New Contact

For all profile changes – name, phone number, email address, department, and user name, please contact Tina Lawrence at tinalaw@vt.edu or 231-9260. Tina is also the contact if users need to have their roles (Requestor, Receiver, Approver) updated.

New Supplier Issues

There continues to be confusion about how to add a New Supplier. Additional information is provided below for your assistance.

To request a **single** New Supplier please provide the following information:

- Complete Supplier Name
- Supplier Address
- Supplier Phone Number
- Supplier Fax Number
- Supplier FIN Number
- Banner ID Number (for VT Employees/Students)
- Supplier Website (when available)

To request **multiple** New Suppliers:

If you need to process POs to a group of suppliers on a **one-time basis**, you may fax the information in a spreadsheet to 231-1177. Please provide the same information requested above.

Miscellaneous New Supplier Tips

To place more than one order to a single New Supplier, please submit an initial request for New Supplier **before** processing subsequent orders for that supplier. This will greatly reduce the processing time.

Information for MAC Users

Firefox is the preferred browser for MAC users. This browser will insure that the HokieMart Punchouts will function properly. The Firefox preference is **not** a HokieMart restriction but rather a restriction of some HokieMart Punchout suppliers.

Reminders

Account Codes

Account Codes continue to be a problem with both current and new users. Departmental liaisons are asked to create a list of the “most-frequently-used” Codes for their area and distribute to all Requestors and On-Behalf-Of Requestors. We ask that you review the list of Account Codes established especially for the HokieMart in Appendix 5 of the Requestor Guide. A full listing of Account Codes may be printed from the Controller’s Website: www.co.vt.edu. Should you have questions on the use of the Codes please phone Accounts Payable at 231-5244 (Jeanie Quesenberry) or 231-8616 (Donna Nichols).

Cost Versus Quantity Receiving

Ninety-nine percent of the time Receivers will use a Quantity Receipt for goods. A Cost Receipt is used for contractual services which are invoiced in incremental payments (consulting, etc.) in which payments are made at the end of each period that the service is completed. If you have questions, please contact Michelle Reinhart-Pochick at mpochick@vt.edu or 231-9308.

Punchout/Hosted Catalog Forms	Receiving Needed
Contract Payment/Purchases Forms	Receiving Needed
Non-Catalog Form	Receiving Needed
Direct Pay	Receiving Needed
Prepayments on any HokieMart Form	Receiving <u>NOT</u> Needed
IPRs and ISRs	Receiving <u>NOT</u> Needed
Reimbursement Request	Receiving <u>NOT</u> Needed
Travel Agency Authorization	Receiving <u>NOT</u> Needed

Procedural Change for Canceling a HokieMart Purchase Order

Departments can send an email to the Purchasing Department (hokiemart@vt.edu) to cancel a PO in its entirety or to cancel an entire line item. See the updated procedures at the following web link (Process 5). <http://www.purch.vt.edu/html.docs/hokiemart/userguides/processes.pdf>

Banner Purchase Orders Now Imported Into HokieMart for Receiving

Purchase orders (except for unencumbered blanket orders) created by the Purchasing Department in Banner are now imported into the HokieMart so that departmental receiving can be performed. These POs are for actions which exceed the delegated departmental purchasing authority and **only the requisition** is created in the HokieMart.

To find the Banner PO in the HokieMart, perform a history query by PO number, select filter, select time frame and the userid that entered the PR (enter “prepared for” userid if On-Behalf-Of Requestor). This query will provide the PO number, the original HokieMart PR number, vendor name, etc. and provide the link between the HokieMart PR number and the Banner PO number.

The department will receive a paper copy of the PO after it is created in Banner. The department will perform the electronic receiving in the HokieMart for the PO.

Email Address for **Prepayments** in the HokieMart

The Controller's Office has established a new email address to be used by departments when there is a **prepayment** in the HokieMart that needs to be processed. An example of a prepayment is a conference registration being paid for an employee prior to attendance. After entering the **prepayment** in the HokieMart, email APVT@vt.edu with the PO# in the subject line of the email. For **prepayments** that need to be paid the next day, please send the email before Noon. All required documentation for the **prepayment** should be attached to the Direct Pay form in the HokieMart. The department does not need to submit paper copies to the Controller's Office for these **prepayments**. Controller's Office staff will monitor the email throughout the day and process **prepayments** as the emails are received. This email address is for **prepayments** only. Departments can continue sending paper copies to the Controller's Office to initiate the payment if they do not want to use the email process; however, **please do not do both**. Receiving is not required for prepayments.

Newsletter Suggestions

If you have positive suggestions/changes or other topics of interest for the The Cart, please send an email to Sherry Crunkilton at scrunkil@vt.edu.

