

The Cart



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Purchasing Department

<http://www.purch.vt.edu>

Processing Dell Orders

All Dell orders should be placed using the HokieMart Dell Punchout. **Only if the product(s) desired is not in the Dell Punchout or you have received a “quote” from Dell** should Dell orders be processed on a Non-Catalog Item form selecting the address below:

Supplier Name/Address	Select
Dell Marketing LP *★ Order Address 1: 1 Dell Way Round Rock, TX 78682 US	Select

We do not recommend using the consumer division of Dell (Dell.com) for the following reasons:

- Dell.com does not accept purchase orders, only credit cards.
- Tax and shipping will be applied to consumer orders.
- Educational tech support offers higher level tech support representatives.
- Dell.com does not offer a direct point of contact with any order issues (customer care, sales, tech support escalations, etc.).

You will find directions on processing Dell Punchout orders on page 2, Vol. 08-2, of the April, 2008 issue of the HokieMart newsletter (The Cart) - <http://www.purch.vt.edu/HokieMart/cart/cart.html>.

Warning Message – Non-Catalog Item

User will receive a warning message when processing a Non-Catalog Item. This message is asking the user to confirm whether they want “HokieMart Will Deliver” the PO or “User Will Deliver” the PO.

Warning: Verify delivery method in "Send to Supplier?" field

Save

-04-22 scrunkil 01 Internal Note add note... Note to all Suppliers

Send to Supplier? HokieMart Will Deliver

Select from profile values...

Select from all values...

If you wish to change the “default” delivery method in the cart:

- Click on “Select from profile values.”
- From the drop-down menu, choose the desired delivery method.
- Click “Save.”

The warning message **will not disappear**, but continue processing the Cart as usual.

PO Cancellations/Changes/Removal of Encumbrances

HokieMart continues to receive emails to cancel PO's when the cancellations can be processed by the department. Please review the instructions below.

CANCELLING ITEM(S) ON PURCHASE ORDERS

- Create a cancelled receipt in HokieMart for all cancelled item(s) or the entire PO. Add a statement in the receipt notes with the reason for the cancellation.
- | | |
|-----------------------------|----------------------|
| Notes
(1,000 Chars. Max) | <input type="text"/> |
|-----------------------------|----------------------|
- If HokieMart cancellation is done correctly, no further action is required. Notice of cancelled receipt will automatically be sent to the Purchasing Department (i.e., **DO NOT email HokieMart to cancel the PO**).
 - A cancelled receipt must now be processed for **all purchase orders**: Non-Catalog Item, ISR's, IPR's, TAA's, Reimbursements, and Direct Pays if encumbrance needs to be removed in Banner. There will no longer be an email notification of the cancellation.
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CHANGING ITEM(S) ON PURCHASE ORDERS PROCESSED BY PURCHASING DEPT.

If the PO was created by the Purchasing Department (PO over \$2,000 processed on a Non-Catalog Item form) a Request for Purchase Order Change form is required to:

- increase or decrease item quantity
 - add a new item(s) to the PO
 - change unit price
-

REMOVING OUTSTANDING ENCUMBRANCES AFTER PAYMENT IS PROCESSED

Continue to send an email to HokieMart@vt.edu when an outstanding encumbrance needs to be removed from a purchase order (i.e., item invoiced is less than PO).

We strongly encourage the department to run a monthly encumbrance report to verify their outstanding encumbrances.

PO Receiving/Cancellation Actions

<u>Form</u>	<u>PO Receipt Action</u>	<u>PO Cancellation Action</u>
Punchout/Hosted Catalog Forms	Required	Required
Non-Catalog Item	Required	Required
Direct Pay	Required	Required
Prepayments on All Forms	Required	Required
IPR's and ISR's	Not Required	Required
Reimbursement Request	Not Required	Required
Travel Agency Authorization	Not Required	Required

Warning Message – Punchouts

When processing HokieMart orders to Punchout suppliers, user cannot “Copy the Cart” or use “My Favorites.” User will receive a warning message which will prevent the order from being processed.

⊗ The supplier of the punch-out item does not support reordering from a previous punch-out request. (Line 1)

Whenever possible, repetitive items should be saved on the supplier's Punchout website. This will allow the user to access current prices which would not be possible if “Copy the Cart” or “My Favorites” were used. Both of these methods would include out-of-date prices.

Addresses in HokieMart

Please do not request that “remit to” addresses be added in HokieMart. The Controller's Office will obtain the “remit to” information directly from the invoice.

New Price Agreement

A price agreement has now been reached with DOT Scientific. This is an additional supplier in the science catalog that has agreed to discount all or part of their product offerings. Their catalog is annotated with a “PA” (★) icon.

Improved Punchout Supplier

TIG (minority supplier) now has a new and improved Punchout. Please take a moment to check it out.

Revised/New HokieMart Guides

The revised HokieMart Requestor Guide may be found at:
<http://www.purch.vt.edu/HokieMart/UserGuides/requestor.pdf>.

HokieMart Quick Guides (20) may be found at: <http://www.purch.vt.edu/HokieMart/ug.html>. Click on the desired guide.

Contract Corner

The Contract Corner is used to provide future new/additional information on Contract Module issues.

Catering Services

The university now has contracts for catering services with the following companies:

Baker's Best Catering LLC
Beltway Supply Inc
Blue Ridge Mountain Catering
Catering by Jill Inc
Champs Sports Bar and Café
Custom Catering
Due South BBQ LLC
Log Cabin BBQ
Professional Catering Inc

Procedure 20310a: Business Meals and Refreshments (<http://www.co.vt.edu/Procedures/p20310a.pdf>) applies to these contracts – **pre-approval from Accounts Payable is required for these services.**

Please review/print the Quick Guide for the Non-Catalog Item. Users continue to have questions on the “select contract” and Delivery Warning messages. The Quick Guide can be found at:
http://www.purch.vt.edu/HokieMart/QuickGuides/Requestor/NonCatalog_Item.pdf

The Bulletin, the publication that was specifically written to give directions, explanations, and instructions for the new HokieMart Contract Module which went into effect on March 21, may be found at:
<http://www.purch.vt.edu/HokieMart/bulletin.pdf>. Users are continuing to ask about the Contract-Payment Purchases form which is no longer in use.

Reminders

- Punchout suppliers **cannot** view External Notes or Attachments. These PO's are transmitted via CXML (computer-to-computer). If users wish to include notes/attachments for the supplier, use the Non-Catalog Item form and place the note/attachments in the External Notes and/or External Attachments sections.
- **UPS Payments** – process on the Non-Catalog Item form.
- **FedEx Payments** – process on the Direct Pay Form (Category C1).

- **Reimbursement for a non-VT individual** for goods/services purchased at personal expense for use by the university (not to exceed \$2,000) should be processed using the Direct Pay form with a Category of KK. Provide full legal name of the reimbursee; do not include the Social Security number. Follow the Quick Guide - Adding a New Supplier if the reimbursee is not in HokieMart:
http://www.purch.vt.edu/HokieMart/QuickGuides/Requestor/Adding_New%20Supplier.pdf
- **Printing HokieMart forms:** While **in the form** use one of three options to print desired form:
Right click on the mouse, choose the print option
Ctrl P
Alt Print Screen
- **HokieMart Classes** – Requestor classes are being taught twice each month. Approver and Receiver classes are being taught once each month. The registration form and dates may be found at:
<http://www.purch.vt.edu/HokieMart/training.doc>.
- **Credit Memos** – Credit memos cannot be entered into HokieMart. If the department receives the original credit memo, please send it to the Controller’s Office with the applicable PO number written in the upper right-hand corner.
- **Direct Pay** – Do not use the Direct Pay form unless the purchase/payment is for item(s) **specifically** listed on the Direct Pay Policy. The Direct Pay policy and categories may be found at
<http://www.policies.vt.edu/3220.pdf>.
- **Shipping as a separate line item** – when preparing a HokieMart cart, please include shipping costs as a separate line item and do not use \$0 as the amount. Estimate the costs as close as possible or check with the supplier.

The Cart

The Cart is distributed on an “as needed” basis and we would appreciate your input. Please send an email to hokiemart@vt.edu or phone 540-231-2020 with any suggestions that you might have.