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Some catalog suppliers allow you to return to the cart you assembled on their website and make changes by adding, removing items or quantities, and the links take you to that shortcut.
Modifying Catalog Orders

However, other catalog suppliers do not let you access your cart once it has been brought back into UD Exchange. Removing an item can be done in the cart, but any other changes, including increasing quantity of an item in your cart, will have to be modified through a new punchout session.
I added items to my cart, but there is already information or other items in it

Possible causes:
• You previously added items to a cart and did not submit it for approval and it is still your Active Cart.
• You submitted a previous cart for approval but it was returned to you and it is now your Active Cart.
• You previously added items to a cart and named it, you may have deleted the items from the cart if you changed your mind, but you did not delete the empty, named cart. It is still your Active Cart.
If you shop and add items to your cart, and then see that there are already items in your cart from a previous shopping search, you can either:

• Select the previous items and choose **Remove Selected Items** from the Items menu if you no longer want them.

OR

• Select the previous items and choose **Move to Another Cart** from the Items menu. Note this does not work for punchout catalog items (an error message will appear in the new cart).
The error message says I can’t add something to my cart ("contains a ‘do-not-mix form’")

Possible causes (see also previous slide):

• Carts can contain a mixture of catalog and non-catalog items, but form requests, such as subawards, non-PO payment requests and waiver of bid requests need their own carts.

• To resolve, get into the habit of fully completing carts by assigning the cart, placing the order, or deleting the cart.

• If this is not possible, create a new cart before you begin a new form or punchout session.
Go to Shop>My Carts and Orders>View Carts. You have at least one cart there, with one cart indicated as Active and you cannot add a different type of requisition to it.

Click **Create Cart**. This will become your active cart and you can proceed. However, you may have already lost your punch-out session. Your draft form request should be saved in Orders>Search>Procurement Requests to continue adding to an empty cart.
Another trick that may help is duplicating your browser tab so that you can resolve the cart issue there while keeping your form open.

Then navigate to previous and repeat your steps to Add and Go to Cart.
Alternatively, if you see there’s already something in your cart then instead of “Add and Go to Cart” choose “Add to new Cart” instead. You will have to access this form from within your draft carts.
I submitted my shopping cart, but it’s back in my draft carts

Possible causes:

• There are multiple reasons that a shopping cart could be returned to your draft carts after you submit it.
• A shopping cart could be returned to your draft carts by an Approver, or as part of the automated checks performed by UD Exchange.
• Possible return reasons for the automatic return include:
  – Combo edit, invalid commodity code, expired project date, supplier issues, budget restrictions. These are covered in more detail in the “Auto Return Troubleshooting Tips” guide.
To identify why a shopping cart was returned to your draft carts, open the requisition and click **History**.

Review the **History Window** to identify the issue that needs to be addressed. The **History Window** will contain a date stamped record of all approval and return steps that were performed by the system or manual approvers.

For additional assistance, please see our guide on “Auto Return Troubleshooting Tips”
I can’t find the Account Code I need ...

Possible causes:
• The account code has been replaced by a new one for use in UD Exchange
• You are used to using an incorrect account code for this type of purchase
• The item is purchased in a different area of UD Exchange.

Solution:
• Revisit the Commodity/Account Code Crosswalk, Non-PO Payment Matrix and Guided Buying references linked from the UD Exchange Home Screen
• Think about what the item IS, not what it is FOR
I changed the commodity code, but I can’t find the right account code

Possible causes:

• You did not save the new commodity code to the item before searching for a new account code.
• The commodity code does not match the account code you want. Remember, account code use is regulated in UD Exchange with new codes created by VP Finance and other codes restricted to where they should be used.
After searching for and selecting the correct commodity code for the item, click **Save before** clicking the Account Code magnifying glass to search for the correct account code. These account codes belong to the old commodity code description, not the new one entered!
Also, remember that the Commodity Code-Account Code Crosswalk is available for download from the Shopping Home Page. For NP-codes, download the Non-PO Payment Matrix.
I can’t find the SpeedType I need.....

Possible causes:
• The SpeedType you are searching for may have expired or there may not yet be a Cost Object Approver listed for it with the Controller’s Office.

Solution:
• Contact coa-finance@udel.edu in the Controller’s Office for assistance in adding a primary COA or confirming that it is active.
I want to recall my requisition

• Users can withdraw their requisition, but this is the equivalent of a “self-reject” – the requisition cannot be submitted back into workflow. Withdrawn requisitions can be copied to a new cart and resubmitted, but punchout orders will need to be re-added in new punchout sessions.

• If you want to have the requisition returned to you in draft mode to make changes and resubmit, please see Having a Requisition or Voucher Returned starting on slide 66.
Withdrawing a Requisition

As long as the Requisition is still in workflow, the submitter can withdraw it from Document Actions. However, once Requisition has completed workflow and a PO has been created, the requisition cannot be withdrawn.
Withdrawing a Requisition

Once the requisition is withdrawn it will indicate withdrawn in requisition history. It can only be copied to a new cart, not resubmitted into workflow.
I want to close a purchase order

- Purchase orders will auto-close when they have been fully invoiced. Orders “soft close” for a period of time during which they can be reopened to issue credits, after which they move to fully closed and update PeopleSoft.

- If a PO has not been fully invoiced and should be closed to release the obligation in PeopleSoft/UDataGlance, this can be accomplished with a comment tagging Procurement Help. As always, all modifications to a requisition, purchase order or invoice must be requested from within UDX for audit purposes – we cannot change any document as a result of a help ticket sent to procurement@udel.edu.

- This is most frequently used for a blanket purchase order. Standard POs should have lines canceled if they are not going to be invoiced.
I want to close a purchase order: Blanket

• This is most frequently used for a blanket purchase order. For instance, a blanket amount was opened because we did not know precisely how much a repair would cost, or how long services would be engaged.

• Blanket orders can be closed with a comment once the user determines that all invoices have been paid.
Choose **Add Comment** from the dropdown menu in that purchase order or navigate to the Comments tab and click +.
1. Choose Add Recipient
2. Search on last name Help
3. Select Procurement Help from the available options.
1. Type a comment requesting closure of the purchase order once the Procurement Help email address is checked.
2. Click **Add Comment**.
I want to close a purchase order: Standard

- Standard purchase orders should be set up by quantity – the order would be precise as to what we are ordering, and once that line/quantity is invoiced, the line is closed.
- A standard purchase order closes once all quantities have been invoiced, regardless of price.
- Therefore, standard purchase orders should normally include a reason why we are not going to fully pay for all items ordered, such as a cancellation by the supplier.
- For catalog orders, you MUST attach documentation that you have already completed the cancellation with the supplier. For other orders, we can cancel as part of the process.
Choose **Add Comment** from the dropdown menu in that purchase order or navigate to the Comments tab and click +.
1. Choose Add Recipient
2. Search on last name
3. Select Procurement Help from the available options.
1. Type a comment requesting closure of the purchase order once the Procurement Help email address is checked.
2. Attach documentation using Choose File.
3. Click Add Comment.
I have multiple invoices on a standard PO

• Standard (UDS) purchase orders can invoice once per quantity per line – all catalog purchase orders should be standard.

• Blanket (UDB) purchase orders will change the quantity in PeopleSoft to 1 and then allow multiple invoices against that line as an amount-only (declining) purchase order.

• If you do not set up a multi-invoice/payment PO but need to pay multiple invoices against a quantity of one on one line, you will need to amend the line using the PO Type Override Box. **This can only be done if the line has not been invoiced.** Please refer to the POTO Box Guide on this topic for more detail.
I can’t find my order!

- Your home screen has quite an array of saved searches, including “My Requisitions” and “My Purchase Orders.”
- These are the documents on which you are the owner, or “Prepared For” user. If you are a Requester processing a cart for a Shopper, they remain the PO owner and they will see the order on THEIR home screen.
- The “Prepared By” is always the one who places the order and cannot be manually changed. The “Prepared For” can be changed and is really the one who is the driving force behind the order and who will know whether it’s been fulfilled.
- If there is a lot of collaboration in your department, it is possible you originated a requisition and assigned it, but you are neither the Prepared For or Prepared By user.
Scroll down the Shopping Home Page to "Requisitions on Which I Am Participant." Here you will see requisitions which involve you in some way—as approver, or in another capacity.

This requisition was initiated by this user but has a different "Prepared For" and "Prepared By" user.

Note that if they are in a department to which you do not have access, you may not be able to view the requisition you created.
Owner Changes for a Purchase Order

• Occasionally, it may be necessary to change the Owner of a PO
  — Example: the Owner has changed departments
• To change the owner of a PO, someone should post a comment in the PO tagging Procurement Help naming the new PO owner
• Department Access will also change based on the new PO owner’s department.
• Changes affect vouchers created after the change is complete – if there are vouchers pending, please see the “Approving Vouchers in UD Exchange” guide for options to handle pending vouchers.
Choose **Add Comment** from the dropdown menu in that purchase order or navigate to the Comments tab and click +
1. Choose Add Recipient
2. Search on last name Help
3. Select Procurement Help from the available options.
1. Type a comment requesting change of the purchase order PO owner once the Procurement Help email address is checked.
2. Click Add Comment.
I can’t find my supplier’s address

• In webforms, you could choose a supplier’s address no matter what kind of address or payment method was used. This resulted in a lot of manual review by AP to adjust to the right payment method for that supplier.

• In UD Exchange, you see the Fulfillment Center for the supplier – this is where the order is sent.

• As long as the payment method is correct, AP can adjust the remit address ... it just has to exist or the supplier will need a new W9.
In this situation, I know my invoices from ADT say 500 Ross St., Pittsburgh, but I can only choose Campus Parkway, Wall Township. This is where the PO will be sent. If they have an update, they will need to do a new W9!
Search on ADT in the Suppliers on the left, then click on the supplier returned.
In the Supplier profile, Click on Addresses under Contacts and Locations, and you will see that the Remittance address is here and can be used by AP.

Requesters can also see Fulfillment Centers, and DPSes can also see Payment Methods in supplier profiles.
Did my invoice pay? How can I tell?

- Payment Activity is not recommended for UD Exchange; more information is visible in UDX than Payment Activity.
- Additionally, if there is a problem with the voucher, AP will comment on the voucher for documentation purposes.
Navigate to Accounts Payable > Vouchers > Search for Vouchers to see all vouchers you have access to. Click on a voucher number.

Filter by due date, paid status, etc., and save your searches!
In the voucher, scroll down to Payment Status. This information is similar to what you would see in Payment Activity and updates after paycycle each day.
If something is not paid, check:
1. Is it still awaiting an approval step?
2. Has the due date (according to the terms) passed yet?
3. Is there a comment about this voucher from an Accounts Payable staff member, explaining further?

Remember – wires pay outside our systems with coordination from Treasury, and the update is done last, after any currency conversion.
I need to increase a closed PO

- When purchase orders are fully invoiced, they soft close to await any credits and for vouchers to move to paid status. After 15 days, they close fully in UD Exchange and PeopleSoft (assuming all vouchers are paid).
- Fully invoiced purchase orders cannot be updated with a change request – even if reopened from soft close status. The option is just not there.
- On occasions, it may be necessary to add funds AFTER it is fully vouchered, such as in a subaward where funds have not yet arrived. **This scenario should be extremely rare** – generally speaking, all POs should be set up for the full amount before any invoices arrive, and increased before fully vouchered, if needed. In most cases, a new PO is more appropriate.
In this scenario, the subaward is fully invoiced and **Create Change Request** is not an option from the Purchase Order Dropdown.
Add a comment tagging Procurement Help to request the PO be reopened with a penny on line 2 (153300) to allow a change request.
The $0.01 increase will NOT sync to PeopleSoft. The PO will only be open and available to increase in UD Exchange.

Procurement Help will reply when complete and the Change Request will be available for that line.
Proceed as normal for the increase, which will go through all required approvals as usual.
I forgot my attachments

- Attachments are required for every type of requisition
  - On NPOP, the required attachment is outlined on the NPOP matrix
  - On purchase orders, you must have at least a quote; competitive quotes are required per the Guided Buying matrix in many circumstances
  - If you are attaching invoices to a PO, you are outside compliance policy – please ensure you are obtaining your PO prior to any engagement!
- Approvers should not approve without review of the attachments. They may hold review and ask you to upload the attachments – return is not necessary.
This requisition did not include any attachments. You can tell by the missing number to the right of the Attachments tab.

Clicking on the Attachments tab shows no Attachments.
The approver will likely insert a comment to let you know that you are missing an attachment. You will get an email letting you know there is a new comment.

Do NOT reply to the email you receive from UD Exchange – replying will send a reply to the person who created the comment but not update the comments here. You must attach the document in the requisition for the audit trail.
First, click the reply arrow next to the comment.

You can also click the + symbol to create a new comment, but then you would have to manually tag the person you want to notify.
1. Enter your comment in the box.
2. Click Choose File.

Pro tip – although you could tag multiple people, only tag those who need to take an action as a result of your comment.
Follow the prompts until your file is showing in the file field.
When finished, click the check mark at the top of the comment.

You may name your attachment, but it is not required.
The attachment is now part of the document for all to see, and the Approver has received a comment to let them know it has been attached and they can review.
What was sent to the supplier?

- You can view the PO that was sent to the supplier if it was a non-catalog or waiver of bid order.
  - Nothing is sent to suppliers for NPOP's or subawards
  - Catalog orders are sent electronically directly into the suppliers' ERPs
- To view the PO, save it, resend it, etc., navigate to the Purchase Order itself and click on the Revisions tab.
The Revisions tab is only on the purchase order, and will have at least the original version, as well as any revisions to that purchase order.
Click on HTML Body Email PO. This will open a new window with the exact format and layout sent in the body of the email to the supplier.
Important Billing Information

Please send all invoices via email attachment to accountspayable@udel.edu, referencing the PO number on the invoice and in the subject line. Invoices sent via postal mail or to any other email address will delay payment. Invoices without a PO number will be discarded.

You can create a PDF from this if you wish to send it to someone else at the supplier.
If attachments are referenced, do not assume that these were sent with the document.
Instead, click on the Attachments tab and determine whether they were Internal or External before sending the attachment outside UD.

If there was an external attachment, it will also be referenced on the Purchase Order.
The Summary screen of the Purchase Order will show where the purchase order was sent under Distribution Information.
If you need the PO redispached, please tag Procurement Help in a comment with the email for this PO. If it should be changed for ALL purchase orders, please ask the supplier to complete a new online W9.
Having a requisition or voucher returned

- A requisition or voucher can only be returned if it has not completed workflow.
- If return of a requisition is required in order to make a substantive change (e.g., increase the amount), please tag the current approver in a comment request to return.
- If a minor change is needed (e.g., check the multi-invoice box), please tag the Procurement approver to make the change at their approval step.
- Documents cannot be returned to the previous approver, only to the beginning/draft form.
- POs do not go through approval workflow, so this applies only to requisitions and vouchers.
Status shows as Completed, this cannot be returned and would have to be amended to make changes.
Document shows as Pending, so it can be returned.
Clicking on the Active Approval step shows the name of the pending approver; this person should be tagged in a comment requesting return.
Approvers cannot make changes, only return, reject or approve. Buyers can make changes, so for minor changes that don’t affect approval, tag the buyer to approve at their approval step.
PRO TIP: To quickly find the buyer’s name, search on Role: Buyer.
Similarly, vouchers showing as pending approval can be returned by an approver.
Vouchers in Payable status have not yet paid and *may* be able to be stopped if workflow is complete but Pay Status is Payable. Comment to the Invoiced By user and Procurement Help if there is an urgent need to stop payment on a completed, payable voucher.

Many catalog orders pay via credit card and will show as Payable until the transaction is reconciled.
Once the voucher shows as Paid, nothing further can be done; you will have to work with the supplier to obtain a credit memo for processing.
Paid vouchers include information about the payment if the supplier needs details.
Vouchers in Payable status have not yet paid and **may** be able to be stopped if workflow is complete but Pay Status is Payable. Comment to the Invoiced By user and Procurement Help if there is an urgent need to stop payment on a completed, payable voucher.

Pending Approvers are not always obvious if more than one are required on a step (see next slides for more).
Who is the pending approver?

- Expanding the “What’s Next” area will show you a preview of workflow steps.
- It is easy to identify the Active workflow step, which will also have the name of an approver associated with it.
- Depending on the type of workflow step, the current approver may or may not be automatically shown.
- When more than one approver is required, the workflow step will not show all approvers until you click to expand the workflow step.
- Details can also be found in the document history.
The active workflow step is the DPS approval. At first glance, it appears that the current approver is Dottie DPS.
However, clicking on the Workflow step to expand shows that Dottie DPS is in the Completed Approval Group and that the actual pending approver is Alice Approver.
Remember! The History also will show you who approved the requisition, when, and how (if by email).
Resources

Do you have suggestions for additions to this guide? Please email us at procurement@udel.edu