

Making sure iProcurement works with eInvoicing

Dear Colleagues,

The University raises thousands of purchase orders every month, and the vast majority of these are accurate, are subsequently matched to invoices and flow through our system seamlessly.

Occasionally however, issues do occur that can prove problematic for those suppliers that send their invoices to us electronically.

Whilst we all know that any system isn't perfect we would just like to remind our buyers of things they could look out for and situations to avoid in order to minimize problems .



What must we avoid when raising Marketplace Requisitions ?

Do not copy Marketplace Requisitions or Orders

Instead consider using **Favorites** and/or **Saved Baskets** for regularly ordered items from the Marketplace as these will be updated automatically if the item details/prices are changed.

Oligos

Where possible use the **Oligo module** for standard oligos or the **punch out to Sigma** web site to specify more complex ones. Both of these will allow you to copy either previously specified oligos or import from a template csv file and then will refresh the price.

Do not add a non-cat line to a Marketplace order.

Most eInvoicing suppliers either do not charge 'standard delivery' or 'packing'. If they do, it is listed as a separate item on the Market Place. The item and then the delivery charge must be added to the basket in the Marketplace.

Don't use a 'Z-marketplace' site on a non-cat order

Eg. the supplier is on the marketplace but the product isn't. Instead send the PDF version of the order to the supplier via email. If Auto-creating or approving orders from others watch out for Z-marketplace orders with either none or inappropriate supplier item codes.

Do not add an alternative product to an existing Marketplace order if the supplier advises that the original item can not be supplied.

The original line must be cancelled from the original order and a brand new requisition raised for the replacement item.

Remember not to mix VAT rates on Marketplace orders

If there is any doubt about the VAT rate of a particular item, please contact the tax team.

Do not finally close orders until after the eInvoice has been received and matched to the PO—see the **Open PO Report** .

Current eInvoicing suppliers

Scientific and Laboratory supplies

- Sigma Aldrich Co Ltd
- Fisher Scientific UK Ltd
- Lifetech Technologies Ltd
- New England Biolabs (NEB)
- Scientific Laboratory Supplies
- Qiagen Ltd
- VWR International Ltd

Office Supplies

- Office Depot UK Ltd
- Lyreco



What problems are being caused?

When Science Warehouse receive a marketplace order containing either old items/ prices or an order that contains a non-catalog line they convert it to an “off-catalog” order in their system before passing it on to the supplier. As buyers you may have received notification emails advising you of this.

CONSEQUENCE

On the face of it this does not impact on you as a buyer, but problems subsequently occur where the supplier tries to invoice your department electronically for the order received via Science Warehouse. The electronic invoice is rejected by Science Warehouse as in their system the order is now ‘Off catalog’. In theory the suppliers should then cancel this electronic invoice and raise a manual invoice for the order.

However, problems arise where either:

- the supplier fails to pick up the rejected invoice; or
- forgets to cancel the eInvoice before re-invoicing manually.

In the first case this results in missing invoices, commitments being left open against research grants and general confusion as the non-received e-Invoices often appear on the supplier’s statement despite us never receiving them. Whereas, in the second case we often receive duplicate invoices for the same order.

GOING FORWARDS

We are constantly working with all our suppliers to try and ensure that they have the systems in place to prevent the above scenarios occurring but as buyers you can play a part in ensuring that the orders raised contain the correct up to date information.

System news

Now live:

Autocreating

The Demand work bench view now includes as standard the fields:

- Requester name
- Note to Buyer

In development:

The Copy Button

We are currently developing a personalization that will physically prevent a user copying a market place requisition.

PO Format

Work has started to specify a new XML format to enable all orders to be transmitted more easily to suppliers by email.

What about my requisitioners?

As a Buyer, part of your role is to either approve and/or autocreate your colleagues requisitions into actual purchase orders. At the point of approval and/or autocreate it is often very difficult to establish whether a particular requisition line has been generated via the MarketPlace or not. Some tips on how to spot these requisition lines are:

- Look out for item lines with a Z-Marketplace site which are either missing a supplier item number or text has been entered that is clearly not from a suppliers’ catalogue eg. “as per quote”
- Know which of your requesters have previously made mistakes that affected the invoice process - we will provide you with a list .

If your department uses the autocreate process

To make the identification of the above information easier when autocreating from the requisition pool, the Autocreation view in the demand work place now has a Supplier Item and Requester column.

Approving requisitions

When approving requisitions it is important that your View the Requisition Details and drill down on each line to check the above information.

Refresher Training

We have developed a short 20 minute on-line refresher session which all requisitioners as well as Buyers with a Zero limit will be asked to complete to remind them of all of the above messages and alternatives available. Completion of this within a reasonable period will be compulsory if they are to retain their iProcurement responsibility.



