

UGAmart Frequently Asked Questions

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Why is my vendor taking so long to be added to the vendor database?

Procurement and Accounts Payable share the vendor database and work closely together when adding new vendors and making changes to existing ones. It is important for users to know when to contact Procurement and when to contact Accounts Payable regarding vendors.

Accounts Payable handles the payment side of vendors. So, when a check request needs to be done immediately, new vendor forms should be sent to Accounts Payable at vendor@uga.edu. The vendor will be entered faster when you have a pending check request and you send the completed form to Accounts Payable for processing.

Procurement handles the purchase order side of vendors. So, when a purchase requisitions needs to be done immediately, new vendor forms should be sent to Procurement. The vendor will be entered faster when you have a pending purchase requisition and you send the completed form to Procurement for processing. Vendor Profile Forms should be emailed directly to Christy Bailey at christym@uga.edu, or a member of the Procurement staff.

Helpful Hint: Check Requests = Accounts Payable
Purchase Requisitions/Orders = Procurement

We appreciate that some purchase requisitions are emergencies and/or simply that you would rather not wait for a vendor to be entered before initiating your purchase requisition. When this is the case, please use **Vendor TBD via Bid** as your vendor for your non-catalog items. You'll find this "vendor" using the same search method you would for other vendors:

Non-Catalog Item

Enter Vendor
 Vendor TBD via Bid

Type "vendor" in the Enter Vendor field and UGAmart will auto populate with the Vendor TBD via Bid option

Item Description	Catalog/SKU Number	Product Size (optional)	Quantity	Price Estimate	Packaging (UOM) Unit of Measure
<input type="text" value=""/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	EA - Each

Why isn't my vendor showing up in UGA^{mart}?

A vendor will only be added to UGA^{mart} when a UGA Vendor Profile Form has been completed by the vendor that includes a purchase order address, and either a fax number or email address where a vendor would like a purchase order sent. Further, the vendor **MUST** accept purchase orders in order to be added to UGA^{mart}. This is indicated on the form by checking "Yes" to the question:

Please provide your Legal Business Name as used on your Tax Return

Legal Business Name*: _____ FEI /EIN# _____ - _____

D/B/A Name: _____ SSN # _____ - _____ - _____

Do you or your company accept purchase orders Yes No

Purchase Order Address _____ City _____ ST _____ Zip _____

Purchase Order e-Mail _____ Purchase Order Fax # _____

Some companies only provide copy of a W-9 tax form - this alone is not sufficient for UGA^{mart}. If only a W-9 can be provided, and a Vendor Profile Form cannot be filled out, the company must also submit, in writing: 1) confirmation that they will accept a purchase order; 2) a fax number or email address where a purchase order can be sent; and 3) the purchase order mailing address so Procurement may correctly address the electronic copy of the purchase order.

Welcome Vendor!

In order to comply with various Federal and State reporting requirements regarding the collection and reporting of correct taxpayer identification numbers (TIN), the University of Georgia Procurement and Accounts Payable departments require individuals, companies, and organizations that anticipate receipt of a purchase order or a payment from the University of Georgia to submit a vendor profile form. If for some reason the electronic form can not be completed please complete the form found at the [University of Georgia Accounts Payable web site](#) and fax to 706-542-6767.

If you are already a recipient of purchase orders or payments from the University of Georgia and need to update your vendor profile please use the form found at the [University of Georgia Accounts Payable web site](#)

A vendor profile form is needed only one time for each vendor paid by the University.

Business Type

Do you (individuals) or your company accept Purchase orders ?

Reset Next

This is the screen vendors see when using the online process for registering to do business with UGA.

Answering "Yes" to accepting purchase orders will then prompt the vendor to provide the required data: Address, and a Fax or Email

Why can't I view a particular document (requisition, purchase order, receipt, invoice) in UGAmart?

Most likely, you do not have access to the initiating department's documents within UGAmart. Check the name of the person who initiated the cart/requisition. This person is listed in the General section of the purchase requisition, and is typically the listed Shopper. If you do not share the same home department with this person, or if you have not been granted access to this department, you will not be able to view the order. If there is no Shopper on the order, only a Requisitioner, the Requisitioner is the cart initiator.

Requisition	
PR Approvals	
Comments (1)	
Attachments	
History	
Summary	
Shipping	
Billing	
Accounting Codes	
Hide header	
General ?	
Status	✓ Completed (8/1/2013 4:16 PM)
Submitted	8/1/2013 4:12 PM
Cart Name	Rainin Test Cart
Description	<i>no value</i>
Purchase Order	E001067 view print
Priority	Normal
Requested Delivery	<i>no value</i>
Ship Via	Best Carrier-Best Way
Requisitioner	Regina Requisitioner
Shopper	Skylar Shopper
Buyer	20 Bobby Buyer (Jan 2013)
Status	<i>no value</i>

Helpful Hint:

Even if an account number belonging to your department was used on the cart, you cannot view the cart unless you have access to the cart initiator's home department.

Cart approvals always route to the corresponding department from each account number used on a cart, but visibility of that cart after approval is limited.

If you need to view an order that you do not have access to you must contact the Responsible Person for the department you are trying to access. The Responsible Person must grant you access to their UGAmart documents by contacting Procurement. Procurement keeps the updated list of Responsible Persons for UGAmart – please contact the [UGAmart Site Administrator](#) for questions regarding this list.

When a user is granted viewing permission to additional departments' documents in UGAmart, the permission cannot be applied to individual requisitions or purchase orders. Once a user has been granted access to a department in UGAmart, that user has access to view all of that department's UGAmart history. Access cannot be granted by document number.

What activities may I perform in UGAmart with the role(s) I am assigned?

Here is a chart with some of the basic functions in UGAmart. If additional roles are needed, please contact the Responsible Person for your department, who may approve additional roles by emailing the [UGAmart Site Administrator](#).

	Shopper (Default Role)	Receiver	Requisitioner	Approver
Shop for items in catalog and punchout	Yes		Yes	Yes
Create non-catalog items	Yes		Yes	Yes
Assign a shopping cart	Yes		Yes	Yes
Add account number and object code to requisition			Yes	Yes
Submit requisitions for approval			Yes	Yes
Create receipts		Yes	Yes	
Approve requisitions				Yes

The Receiver role is not recommended to be used by itself. The Receiver role is intended to be assigned to a user who already has the Shopper role. The combination of Shopper + Receiver roles allows a user to create a cart and also verify receipt of the items or services when they arrive or have been performed.

Why won't the system let me approve this order? (for those with the Approver role)

Most likely, you "touched" the order before it routed to the Department Approval step. If you acted in the Shopper or Requisitioner capacity before the requisition was submitted for approval, you cannot also approve the order.

The most common cause for this issue: a Requisitioner pressed the "Assign Cart" button instead of the "Submit for Approval" button. "Assign Cart" means you want to assign the cart to a Requisitioner to further review the order. "Submit for Approval" means you want the department approvers to approve the order so it may continue on in the approvals process.

In the below example, if your name is on the left-hand side of the PR Approvals workflow (e.g., UGA Approver and UGA Shopper), you cannot act as an Approver for this requisition.

University of Georgia Procurement System Interface

Allen Approver | Action Items 20 | Notifications 1 | 0.00 USD

Orders & Documents > Document Search > Search Documents > Approvals - Requisition 1041167

Return to Search Results | 1 of 1 results | Document Number(s) 1041167 (Requisition)

Available Actions: Add Comment Go

Requisition **PR Approvals** Comments Attachments History

Orientation: Horizontal

Submitted
Allen Approver
On behalf of:
Skyler Shopper
12/5/2013 1:11 PM

Account/Budget Check
Completed ✓
System ✓

Department Approval
Active
view approvers

Travel and Encumbrance
Future →
view approvers

Final Account/Budget Check
Future →
view approvers

Create PO
Future →
Finish

Workflow Step Approvers (Department Approval)

Approver Group : Department Code: 053 (053 - PROCUREMENT): (All Values)

Allen Approver	chadcox@uga.edu	+1 (706) 542-7109
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Close

This example shows where Allen Approver is the designated approver for this department. However, since the cart was "assigned" to Allen instead of submitted for approval this is preventing Allen from accessing the approvals option for this cart.

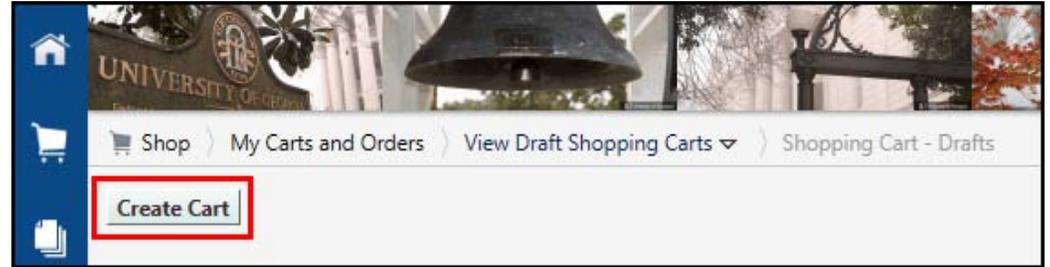
I need to redo a requisition, but I don't want to type out all those line items again – HELP!

First, make sure that you have an empty cart.

This can be done in several ways.

One way is to go to:

Shop > My Carts and Orders > View Draft Shopping Carts, and then select “Create Cart”.



Now, once you have an empty cart, search as you normally would for the requisition you would like to copy. Select all the line items you would like to copy to a new requisition by selecting the check boxes to the right of each line item. Pull the drop-down box and select “Add to Active Cart”. Click Go. The Items will be copied over into your shopping cart.

Vendor / Line Item Details

Hide line details

WORLDWIDE MEDICAL PRODUCTS INC [more info...](#)

Fulfillment Address 1
2521 Kuser Road, Hamilton, NJ 08691 US

**Note: This feature is specific to non-catalog items.
Do not use it with Punchout or Catalog items.**

For selected line items: **2**

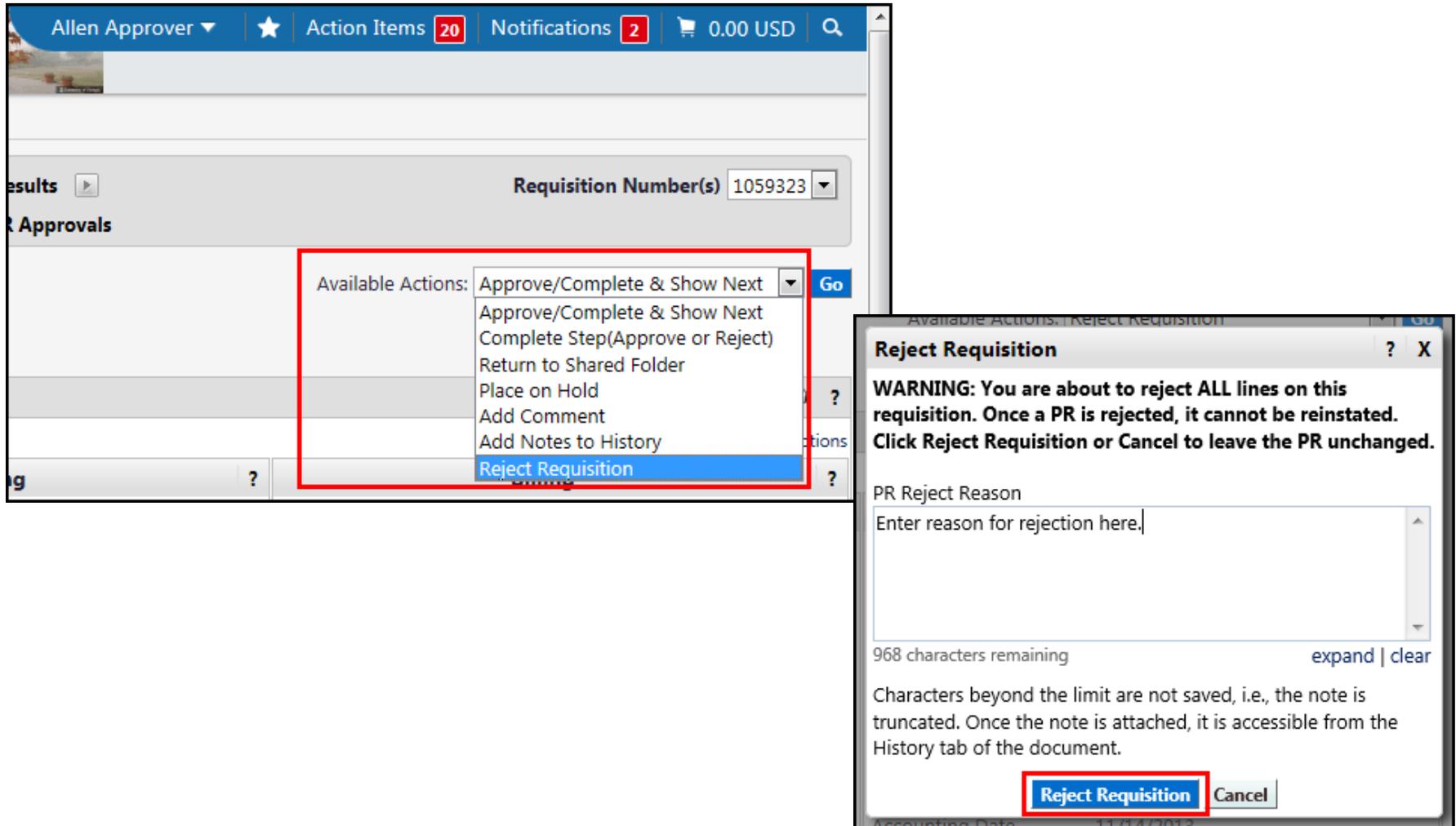
Contract
PO Number
Quote Number 4101
PO Clauses
no clause

View/edit by line **1**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input checked="" type="checkbox"/>
1 MAGic Clamp™ universalplatform for flasks & tube racks more info...	50021169	EA	250.00	1 EA	250.00 USD	<input checked="" type="checkbox"/>
Taxable	x	Internal Note	<i>no note</i>			
Commodity Code	<i>no value</i>	Internal Attachments				
UGA Part Number	<i>no value</i>	External Note	<i>no note</i>			
WCD Code	<i>no value</i>	Attachments for vendor				
B Number	<i>no value</i>					
2 MAGic Clamp™ magneticclamp, 3000ml Erlenmeyer more info...	50021190	EA	64.00	4 EA	256.00 USD	<input checked="" type="checkbox"/>
Taxable	x	Internal Note	<i>no note</i>			
Commodity Code	<i>no value</i>	Internal Attachments				
UGA Part Number	<i>no value</i>	External Note	<i>no note</i>			
WCD Code	<i>no value</i>	Attachments for vendor				
B Number	<i>no value</i>					
3 Incu-Shaker™ 10LR with non-slip rubber mat- Refrigerated ShakingIncubator- 115V more info...	50021217	EA	6,334.00	1 EA	6,334.00 USD	<input checked="" type="checkbox"/>

How do I cancel/reject a requisition that has been sent to me for approval?

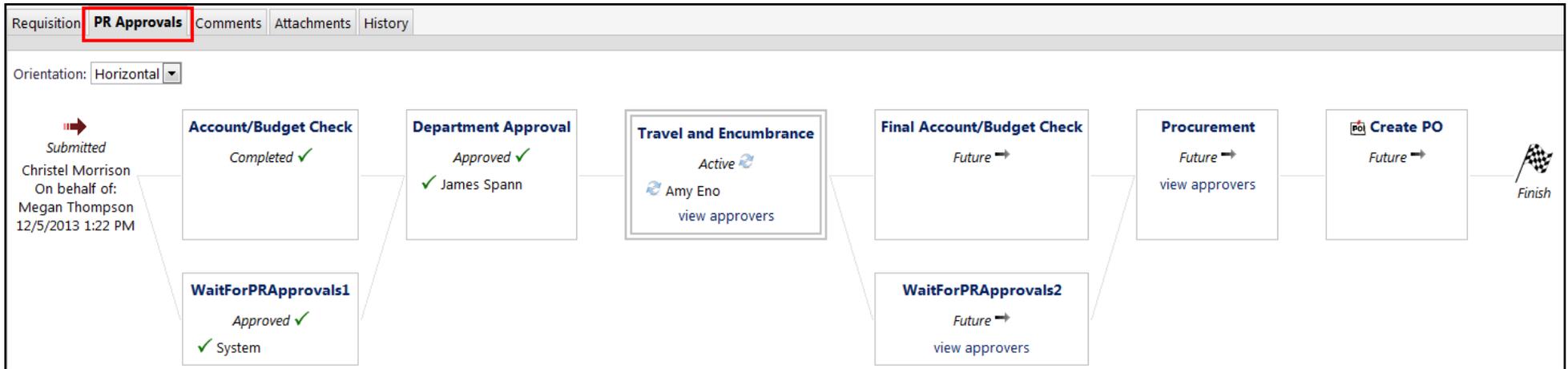
First, make sure the requisition is assigned to you. Pull down the drop-down list in the top right-hand corner of the requisition; select “Reject Requisition” and click Go. A smaller window will open. Here you may enter the reason for rejection, although this field is not mandatory. Click “Reject Requisition.” The requisition is rejected. Only those with the Approver role have this functionality. Also, remember that once a requisition is rejected, it cannot be un-rejected.



The screenshot displays a web interface for requisition management. At the top, a navigation bar shows the user's name 'Allen Approver', a star icon, 'Action Items 20', 'Notifications 2', and a shopping cart icon with '0.00 USD'. Below this, a search bar contains 'Requisition Number(s) 1059323'. A dropdown menu titled 'Available Actions:' is open, listing several options: 'Approve/Complete & Show Next', 'Approve/Complete & Show Next', 'Complete Step(Approve or Reject)', 'Return to Shared Folder', 'Place on Hold', 'Add Comment', 'Add Notes to History', and 'Reject Requisition'. The 'Reject Requisition' option is highlighted in blue. To the right of the dropdown is a blue 'Go' button. A dialog box titled 'Reject Requisition' is overlaid on the right side of the screen. It features a warning message: 'WARNING: You are about to reject ALL lines on this requisition. Once a PR is rejected, it cannot be reinstated. Click Reject Requisition or Cancel to leave the PR unchanged.' Below the warning is a text input field labeled 'PR Reject Reason' with the placeholder text 'Enter reason for rejection here.'. Below the text field, it indicates '968 characters remaining' and provides 'expand | clear' links. At the bottom of the dialog, there are two buttons: 'Reject Requisition' (highlighted in red) and 'Cancel'.

What is the status of my requisition?

At any time during the procurement process, you may open up a pending requisition to check the status by clicking the PR Approvals tab on the requisition. The workflow steps shown must each be taken before the purchase order can be issued. Keep in mind that every PR approval workflow may be different depending on many factors. For example, if the account being used is a grant account, the PR must also travel through Contracts & Grants for approval. The example shown below is a simple and very basic workflow process.



When your requisition reaches Procurement, you may check the status by first looking in the “Cart Name” field of the PR. Procurement staff utilizes the “Cart Name” field as a way to communicate where the PR is in the procurement step approval process. In this example, the buyer has indicated the most recent activity on the PR. The immigration and security form has been requested from the vendor.

If the “Cart Name” field is blank or if you have further questions regarding the status, you may always leave a comment for the buyer assigned to the requisition. The Procurement staff member can be found in the “Buyer” field on the requisition.

Requisition	PR Approvals	Comments (4)	Attachments (3)	History
Summary				
Shipping Billing Accounting Codes Vendor				
Hide header				
General				
Status	Pending Buyer Assigned			
Submitted	11/12/2013 9:30 AM			
Cart Name	Requested Immigration Form 11/12/13; 2013-11-11 makins 02			
Cart Description	no value			
Priority	Normal			
Requested Delivery	no value			
Ship Via	Best Carrier-Best Way			
Requisitioner	Melissa Archer			
Buyer	26 Charles Nixon			

The final invoice has been paid. How do I unencumber funds from the PO and return them to my account?

Open the purchase order and add a comment for a representative of Accounts Payable. Indicate the amount to be unencumbered.

The screenshot shows a purchase order system interface. At the top, the PO/Reference No. is E162373 Revision 0, and the Vendor is OFFICEMAX INC. A red box highlights the 'Available Actions' dropdown menu, which has 'Add Comment' selected. A red arrow points from this menu to the 'Comments' tab in the navigation bar. A yellow callout box with the text 'You can use either option to add a comment' is positioned over the 'Comments' tab and the 'Add Comment' option in the dropdown menu. Below the navigation bar, there are sections for 'General Information' and 'Document Status'. The 'General Information' section includes fields for PO/Reference No., Revision No., Vendor Name, Purchase Order Date, and Total. The 'Document Status' section includes fields for A/P status, Workflow, and Distribution.

General Information		Document Status	
PO/Reference No.	E162373	A/P status	Open
Revision No.	0	Workflow	✓ Completed (12/10/2013 3:34 PM)
Vendor Name	OFFICEMAX INC more info...	Distribution	The system distributed the purchase order using the method (s) indicated below the last time it was distributed: view cXML (Electronic Integration)
Purchase Order Date	12/10/2013		
Total	44.59		

I left a comment in UGAmart. Why hasn't anyone responded?

Ensure that when leaving a comment, you have selected the check box next to each person's name who you want to receive an email notification that the comment was added. If you do not select anyone to receive the email notification, then no one will be notified. Although the comment will be still be added, no one will see it until they pull up the document in UGAmart.

The screenshot shows the 'Add Comment' dialog box in UGAmart. The dialog box contains a text area for the comment and a list of email notification recipients. The list includes Bobby Buyer (Approved), Chad Cox (Approved), Regina Requisitioner (Prepared by), and Skyler Shopper. The 'Skyler Shopper' entry is checked, and a red box highlights it. A yellow callout box with the text 'In this example, Skyler Shopper is the only person who will receive an email that the comment was added to UGAmart.' is positioned over the 'Skyler Shopper' entry. At the bottom of the dialog box, there are 'Add Comment' and 'Cancel' buttons. The dialog box also shows '1000 characters remaining' and 'expand | clear' options.

Add Comment

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification(s):

- Bobby Buyer (Approved) <chadcox@uga.edu>
- Chad Cox (Approved) <chadcox@uga.edu>
- Regina Requisitioner (Prepared by) <chadcox@uga.edu>
- Skyler Shopper <chadcox@uga.edu>

add email recipient...

In this example, Skyler Shopper is the only person who will receive an email that the comment was added to UGAmart.

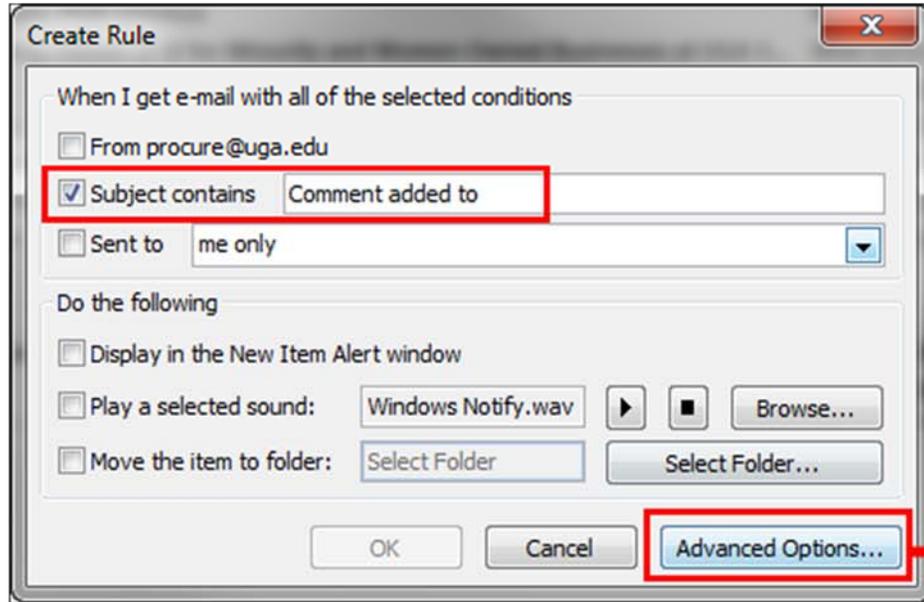
1000 characters remaining [expand](#) | [clear](#)

[Add Comment](#) [Cancel](#)

When a comment is sent to a user who is away, is there any way to have UGAmart send an auto out-of-office reply?

Currently, there is not an auto-reply feature in UGAmart. We are hopeful that this may be something SciQuest implements in a future upgrade. In the meantime users can set up a rule within their email system to *Forward* emails to someone else while they are away from the office.

The screenshots below are from Microsoft Outlook.



All email notifications from UGAmart start with the subject line "Comment added to". Use this rule to then forward your emails to one or more individuals so they can take action during your absence.

Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives with Comment added to in the subject forward it to people or public group

Do not use the Reply option because that will send your email to the procure@uga.edu email address.

Is payment information (check number and check date) viewable in UGAmart?

Yes. Check number and check date are displayed in the "Payment Information" box on each invoice within UGAmart.

The screenshot displays the UGAmart interface for a Vendor Invoice. The breadcrumb trail is: Accounts Payable > Invoices & Receipts > Search For Invoices > Summary - Vendor Invoice No. IN-132094 (Doc. No. 10250722). The invoice details include: Invoice Number 10250722, Vendor Invoice No. IN-132094, and Vendor Name SOUTHERN COMPUTER WAREHOUSE. The 'Payment Information' section is highlighted with a red box and contains the following data:

Payment Information	
Accounting Date	10/28/2013
F.O.B.	no value
Payment Method	Check
Check Number	688063
Record Date	10/28/2013

Could you create a “reference guide” with step-by-step instructions on how to do a quantity receipt?

Log into UGAmart.

In the top right hand corner, make sure the Quick Search field is defaulted to Purchase Order Number. In the box to the right of that field, enter the applicable PO number. Click the search icon.

Your search will redirect you to the PO status screen for your purchase order.

From the available actions drop down (far right under the Action Items and Notifications area) select “Create Quantity Receipt.” Click “Go.” Your selection will redirect you to the New Quantity Receipt page.

Under Header Information, enter the receipt date (click on the calendar). Packing slip no. is not a required field, but entering the information is a best practice. Other delivery information can be added as well, such as carrier, etc. Attachments can also be uploaded in the Header section in the event that you wanted to attach the packing slip, etc.

The receipt lines section will return the items on your PO. Scroll over to the right and update the quantity field to the quantity that you received. Leave the line status defaulted to received. If a line item is appearing that was not included on the shipment, you can select remove line here and it will remove the line from this receipt only. Removing an item from a receipt does not cancel the item from the order.

When you have updated the quantities, review the receipt and make sure everything is correct. When you are ready to submit, click the “Complete” button.

[Click here to view the UGAmart receiving demo](#) or [Click here to see a list of all the UGAmart training demos](#)

Could you create a “reference guide” with step-by-step instructions on how to return an item? (Last Updated on 11/28/2016)

Log into UGAmart.

In the top right hand corner, make sure the Quick Search field is defaulted to Purchase Order Number. In the box to the right of that field, enter the applicable PO number. Click the search icon.

From the available actions drop down (far right under the Action Items and Notifications area) select “Create Quantity Receipt.” Click on “Go.” Your selection will redirect you to the New Quantity Receipt page.

Under Header Information, enter the date that you are returning the items (click on the calendar.) You can also enter carrier information under the Delivery section for tracking the return of the item.

Next scroll down to the Receipt Lines section.

Remember, the draft receipt will automatically populate with all outstanding line items and quantities on the purchase order. Users will need to update the quantities accordingly for all PO line items.

Go to your line item that you are returning. Update the quantity to the quantity being returned. Under line status, click on the drop down menu and select “Returned.” Utilizing the “Returned For” drop down menu, select why you are returning the item. Enter the applicable RMA No. information. Each line item also provides you with the opportunity to add attachments if you have documents that are associated with the return. Remove any other PO items that are not applicable to the return. This can be done by clicking on the “Remove Line” button on that particular line item.

When you have updated all the applicable information and reviewed the document, click on the “Complete” button.

**If you are returning an item and expecting replacements, be sure to add comments to the purchase order so Procurement, Accounts Payable, and Mail & Receiving Services are aware. Comments should be sent to Dwayne Weaver in Mail & Receiving Services and to Procurement (by either selecting the buyer who processed the PO or searching for the buyer who is responsible for that commodity via [Procurement Commodity Assignments](#).)

[Click here to view the UGAmart receiving demo](#) or [Click here to see a list of all the UGAmart training demos](#)

How should I notify Accounts Payable that I have received an invoice?

If a departmental user receives an invoice directly, they should scan the invoice into their computer and save the image. The user should log into UGAmart, and scroll down to the “Important Information” section on the bottom left of the home page. Users should open the Accounts Payable Contact Information document to see what payment processor to assign the invoice to. Users should search for the applicable PO and click on the “Comments” tab. The invoice image can be uploaded as a comment. Users should search for the appropriate AP processor to add as the recipient of the comment/image.

Who should I call to follow up on an unpaid invoice?

Users should log into UGAmart, and scroll down to the “Important Information” section on the bottom left of the home page. Users should open the Accounts Payable Contact Information document to see which payment processor would handle the particular vendor in question. The Accounts Payable website also contains a list of responsibilities for each employee and can be viewed at: http://www.busfin.uga.edu/accounts_payable/apstaff.htm

How do I know when to do a quantity receipt and when to do a cost receipt?

Cost receipts are generally used when services are being rendered; for example, if you have a consulting agreement that is encumbered. You have a certain amount that is encumbered for fees for services rendered and another amount for reimbursable expenses. When you process receipts for this order, you will want to do cost receipts since you will be authorizing Accounts Payable a specific amount to pay and there are no true quantities associated with the line items.

If a purchase order is set up for delivery to Mail & Receiving Services, but it gets directly delivered to our department, what should we do? (Last Updated on 11/28/2016)

Please email Dwayne Weaver at ldweaver@uga.edu in Mail & Receiving Services. A representative of Mail & Receiving Services will create the receipt for the purchase order.

If I have an issue with a vendor, what should I do?

Contact Procurement and speak with the staff member who is responsible for the contract or commodity. You will find the list of commodities and contracts assignments here: <http://www.busfin.uga.edu/procurement/pdf/CommoditiesandContracts.htm>.

Procurement will document the concerns and take the appropriate actions necessary. If the vendor in question is a statewide contract vendor, Procurement will file a vendor performance report through DOAS State Purchasing Division to update the State regarding the vendor's performance.