Yo-Mart Hints, tips and suggestions
September 18, 2014

1. Please keep us informed as personnel change, especially your approver. Your new approver will need to submit a Yo-Mart User Profile form. Departments are no longer required to have more than one approver.

2. If you are submitting a requisition with an attached invoice and/or do not want the purchase order to be sent to the supplier, please check "Confirming Order" in the General block of your requisition.

3. Changes to ship to addresses must be made by purchasing personnel in Banner. If your address has changed or is not in Yo-Mart, please email that information to Vickie Young at youngvc@appstate.edu.

4. If you are using your pcard please use the "Pcard Only" Billing Address. Likewise, if you are using a purchase order choose "Controller's Office."

5. When setting up or editing your pcard information DO NOT check "apply the default card" or all your orders will be charged to your pcard.

6. If accounting information needs to be changed after a purchase order is issued, the lines must be canceled and re-entered against the new FOAP information. It may be easier to issue a new purchase order or do a journal entry.

7. If you get a quote from a punch-out supplier, make sure that pricing is better than the catalog pricing before you enter as a non-catalog item. Usually quotes from CDW-G are for the same price as the catalog and using the catalog expedites ordering and invoicing because it all takes place electronically.

8. There is much information that can be found in the vendor's punch out catalog pages. Usually customer service contacts, sales reps, past orders, etc. Copies of invoices can be obtained in some.

9. If ordering toner, especially remanufactured or HP toner, please check pricing established with W. J. Office equipment. Information including search and order options are outlined in the link provided on the home page message board.

10. Please read the home page message board or new messages as they are sent out!

11. Invoices received after the order is placed can be sent to asu-invoices@appstate.edu.

12. If changes need to be made to a purchase order, please enter as a comment and address the comment to either Dwayne Odvody, Chad Hicks or Vickie Young (but only one, not all).

13. Remember, history is the best place to look for actions or changes to your requisition or purchase order. If you need to know if an invoice has been paid, first check the settlement status and then click on the invoices tab. If the status is payable, click on the invoice number and then the History tab. If the note says "The invoice has been successfully sent to the ERP" that means it has been sent to Banner to be paid. Please be aware the check will not be cut until the invoice due date.

14. When receiving, clicking the "Complete" button does not mean the order is received in full, it means the receipt you are keying is completed. Please read any warnings that may appear to prevent duplicate receipts. Purchasing can delete duplicate receipts but only if no invoices have been entered.

15. When looking at comments, you can choose "All" from the "Show comments for" and see comments attached to requisitions, purchase orders, receipts and invoices.

16. If a requisition is withdrawn by the requestor, they must copy it in order to resubmit.

   If a requisition is rejected by the approver, the requestor must copy it in order to resubmit.

   If a requisition is returned by the approver, the requestor can edit and resubmit the requisition. Before an approver can return a requisition, the approver must assign the requisition to themselves.

17. Follow these instructions to submit an attachment through Yo-Mart for requisitions already in process:
    a. Open the document
    b. Click on the Comments tab.
    c. Click on Add Comment
    d. Browse and attach the file.
    e. Note: if you are attaching a document such as an invoice to a purchase order, you must send an email notification to Vickie Young or Dwayne Odvody. Yo-Mart will <u>not</u> automatically notify us it has been added.