

PROCURE-TO-PAY NEWSLETTER

William & Mary Procurement Services & Accounts Payable

November 2021

buyW&M Updates

SPCC or buyW&M? Here are some tips:

Question	Purchase/ Payment Type
Is the vendor active in buyW&M? ESI = quarterly invoices (blanket PO)	buyW&M
Point of Sale Purchase with no guidance yet from buyW&M core team?	SPCC
Recurring purchases but vendor still not active in buyW&M?	SPCC (for now)

buyW&M Shopping News

FedEx / UPS Process

- Both Vendors are Active for Shopping in buyW&M
- Create a blanket PO for the invoices for FY22 to process invoices in buyW&M
- Both vendors have been advised of the change in processing

ESI copy charges

- Blanket PO – invoices issued QUARTERLY instead of monthly

Questions? Email buywm@wm.edu



Procure-to-Pay Forum Available in Cornerstone

The virtual Procure-to-Pay Forum held on 11/3/21 is now available in [Cornerstone](#) and can be found by searching "fall 2021 procure-to-pay forum" in the search bar. Video, PowerPoint, and Q&A are included. Questions or comments? Email procure@wm.edu



SPCC Reminder

SPCC requests and usage should be minimal as buyW&M will be utilized for the purchase of goods and services. Procurement Services will review all card requests, which is why it is advisable to reach out to the Program Administrator *before* completing training or an application to ensure a card request will be honored. Frequently used vendors should be invited to buyW&M if they have not already so they are ready for use when needed.

Visit us online at www.wm.edu/offices/procurement or email procure@wm.edu

Recent Contract Activity

For a list of current solicitations, [click here](#).

In Progress

- E-Learning
- Highland Exhibit Design Services
- Ventilation and Duct Cleaning

Coming Soon

- Vessels—Term Maintenance & Repair
- Lodging & Conference Events
- International Student Recruitment Services

Guidance on Gift Policy

Under state law, a university employee may not accept any gift, even of nominal value, that tends to influence an employee in the performance of their university job. It is prohibited to accept gifts from current or potential vendors. Gifts from other sources (colleagues, professional networks) may be permitted if the gift is valued at less than a specific dollar amount. Disclosure of the acceptance of non-vendor gifts to you as a university employee to the Conflict of Interest Committee is required under the Conflict of Interest Policy.

Questions? Email procure@wm.edu

buyW&M Invoices Paid to William & Mary (Disbursements Issue)

Due to space limitations, addresses are not being created for each department on the W&M Vendor Profile in buyW&M. Since a W&M check will have the PO Box address, it is necessary for a W&M check to be treated as a special handling request. An example of how to complete the Special Handling Request on a check request is below. *If the dept info is not provided, check will be sent to invoice owner.

▼ Special Handling Request

Do you need the check held for pick up (this cannot be requested for vendor enrolled in e-payables)? *

Yes No

Reason for check pickup: *

Please send by campus mail to Student Accounts in Blow Hall

1941 characters remaining

Request for AP to Reject or Return an Invoice

If an invoice needs to be returned or rejected, please use the comments section of the invoice to communicate to AP. Be sure to tag an AP team member directly (example below)

Records Found: 0

Show comments for: Invoice

ADD COMMENT

Please return invoice for correction

184 characters remaining expand | clear

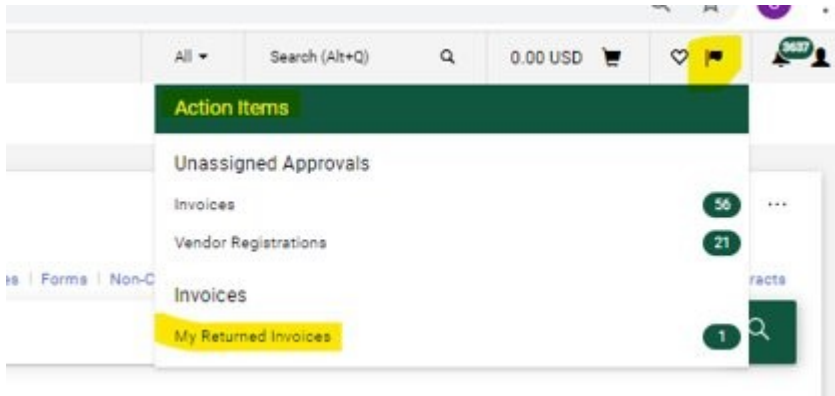
This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

Email notification: **add recipient**

- Adrienne Tillman (Approved) <avashington@wm.edu>
- Cathleen Calk (Prepared by: Prepared for) <ccalk@wm.edu>
- Emily Rivest (Approved) <erivest@wm.edu>
- Joe Cope (Approved) <jcope@wm.edu>
- Lisa Young (Approved) <lyoung@wm.edu>
- Marisa LaForge (Approved) <miforge@wm.edu>
- Regina Burrell (Approved) <rbur2@wm.edu>

Returned Invoices

If an invoice needs to be corrected, additional documentation is needed or the receiving has not been entered, it may be necessary for AP to return the invoice. An email notification is sent when an invoice is returned, however the returned invoice can be located under the Action Items Flag – Invoices – My Returned Invoices



Click on the invoice and view the Comments tab to identify why the invoice was returned. Once the issue has been resolved, the invoice must be resubmitted into the workflow for processing. Click the Complete button at the top right of the invoice.

WILLIAM & MARY | BUYERS

Invoice 114720486

Summary Matching Vendor Messages **Comments** Attachments History

Records Found: 2

Show comments for: Invoice

Amber Brown - 10/29/2021 3:38:02 PM

Please attach the vendor invoice and resubmit

Complete

Draft	
VWR International, LLC	
Vendor Invoice No.	8806474084-0
Total (-403.64 USD)	
Subtotal	-403.64
Balance	0.00