



PROCURE-TO-PAY NEWSLETTER

William & Mary Supply Chain Services

July 2022

Purchase Order Updates in buyW&M

Purchase Order Cancellation Request Form: All Purchase Order cancellations now need to be requested using the Purchase Order Cancellation Form found on the Shopping Dashboard under Procurement Forms. The reasoning behind this change is to eliminate PO edits without a change request. Unfortunately, the permission that is associated with PO edits ties to the cancellation permission. To reduce the risk of having PO edits without a change request we need to inactivate this permission. A request ticket resides with Jaggaer to separate these two permissions so we can control the two functionalities separately in the future.

Department Purchase Order and Invoice Searches: There are two new search reports to help Departments capture Purchase Order and Invoice submittals along with accounting information within buyW&M. These searches were generated with the help and feedback of various departments. In order to access these reports you will need to go through the “Manage Searches” option under the user’s profile. A user guide for full instructions can be found in the link below or via the Documentation link on the buyW&M Website (wm.edu/buywm): <https://wm1693.app.box.com/file/981837767455>

New Punchout Vendors in buyW&M



CDW-G, a VASCUPP contracted Value Added Reseller which features information technology products, expertise, and customer support, recently went live with a punchout in buyW&M. Please use this method for ordering from CDW-G to streamline ordering and provide you with electronic invoicing for the punchout orders.



Lowe’s is also now available for punchout ordering! For Lowes purchases, you can utilize the new punchout found on the shopping dashboard, which will allow for either store pick up or delivery. For a how-to guide to using the Lowe’s punchout, see page 2 of the [July buyW&M Announcements](#).

Supply Chain Services Forum & ATG Tasting Event



Join us **Thursday, September 15, 2022, from 9:00a.m. - 11:00 a.m.** in the Sadler Center Commonwealth Auditorium to hear the latest from Procurement Services & Accounts Payable. Following the Forum, attendees are invited to move to Sadler Center Chesapeake A from 11:00 a.m. - 1:00 p.m. for a menu tasting featuring America To Go caterers. We are looking forward to the opportunity to meet on campus for this event!

Recent Contract Activity

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

In Progress

- E-Learning
- Lodging & Conference Events
- Special Events Rentals
- Strategic Services
- Landscaping Maintenance

Coming Soon

- Vessels—Term Maintenance & Repair
- Admissions Recruitment Software

America To Go Updates

ATG has updated the ordering process as follows:

1. Immediately upon placing an order an email will be sent with a copy of the order attached. It includes a reminder of the next steps: approval process and confirmation by the vendor.
2. If an order remains in draft status for more than 24 hours a second notification is sent to the customer reminding them that the order has not been approved and sent to vendor for confirmation.

ATG Reminder: The full name and affiliation is required to be included on the ATG order for business meals for 10 or less attendees.

Flower Purchases

The limit amount for flower purchases under the local fund policy has been increased. Using Local Funds, flowers/plants for public or common areas are allowable, flowers/plants for non-employees up to \$150 per person are allowable, and flowers/plants or donations for the death of an employee's immediate family member up to \$150 are allowable. For more information, see the "Flowers/Plants" section of the [Procure to Pay Matrix](#).

Enterprise Update

William & Mary, as well as all the VASCUPP institutions, has been notified by Enterprise that due to *"the effect of several industry headwinds coupled with this global emergency has had a significant impact on the economics of our business"* the pricing under the E&I agreement has increased by 5%, effective July 15th, 2022. Until our website is updated, vehicle renters may notice that pricing may be different than what is currently posted on our website. As an example, the cost of an economy car will increase from \$31.75 to \$33.34.

IT Headset Ordering in buyW&M

If you purchase headsets from IT via buyW&M, the PO does not get encumbered, received or invoiced. IT will take the money from the index used on the order. After the order is placed there is nothing left to do in buyW&M.

buyW&M Virtual Office Hours

For help with a specific scenario in buyW&M, stop in during the buyW&M Zoom office hours on Wednesdays from 2:30 - 4:00 for assistance. Zoom link: <https://cwm.zoom.us/j/...EU3FicWVJNTJoNEFjUT09>

New buyW&M CR Reimbursement Vendor Request Process

We heard your feedback and now have a new process for individuals needing to be reimbursed via Chrome River that allows you to securely obtain the vendor's tax document and complete the vendor request on the individual's behalf. All of the User Guides regarding the process, including the DocuSign links to obtain an electronically signed W9 or W8-BEN from the individual can be found in Box under the buyW&M Documentation—Vendor Request and Update Processes folder (Individual links are listed below). Special thanks to the law school for their insight and collaboration!

Step 1: DocuSign W9_W8 Dept Staff Instructions

<https://wm1693.app.box.com/file/983309523750>

Step 2: DocuSign W9 or W8BEN Vendor Instructions

<https://wm1693.app.box.com/file/983307292182>

Step 3: buyW&M CR Reimbursement Request User Guide

<https://wm1693.app.box.com/file/983340756139>

Speaker/Presenter Requests

The Speaker/Presenter/Performing Artist Agreement Contract Request can be accessed via the buyW&M Shopping Dashboard. A guideline and video are available via the P2P Matrix: <https://procuretopay.wm.edu/index.php#row%22136.%22> Please utilize the Speaker Contract Request to generate a speaker/presenter/performer contract. Your request will be processed by Procurement and a contract will be sent directly to the speaker for signature from buyW&M. You will receive confirmation and the executed contract back via buyW&M. Please feel free to contact Procurement with any questions at procure@wm.edu.



SWaMfest is BACK!

Announcement from SWaMfest: The premier networking conference for **Small, Woman-Owned and Minority-Owned businesses** is back (at the perfect time too.) Join us at Main Street Station in Richmond Virginia on October 26 and 27 for SWaMfest VERSES: Unleash Untapped Potential.

As business owners and leaders everywhere prepare for an economic slowdown, now is the time to make new contacts and expand your network. The past two years have greeted the world with *shifting dynamics* that have **tor**n the fabric of **how business has traditionally been done**. We now have the unique opportunity to create an alternate reality, unlike any previous generation. An *opening in this time continuum* allows organizations of all sizes to **reassess and refocus** on how they operate. **Let's embrace it.**

[Watch the event trailer here!](#)

[View the event website here.](#)