

Yo-Mart Hints, tips and suggestions
January 18, 2017

1. **Please read comments sent to you by Yo-Mart.** Many are being ignored. If you have set up filters for Yo-Mart and/or are getting too many emails, you need to adjust your notification preferences in your profile.
Click drop-down beside your name, View My Profile, Click Notification Preferences.
2. 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.
3. 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. Please note that Purchasing can no longer create receipts.
4. 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.
5. 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."
6. 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.
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. 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.
11. Invoices received after the order is placed can be sent to asu-invoices@appstate.edu. Or you can enter a comment, attach the invoice and address within Yo-Mart to "AP Invoices."
12. If changes need to be made to a purchase order, please enter as a comment and address the comment to the buyer listed on the purchase order. If the buyer is no longer employed here, you may direct them to any of the buyers.

13. Please read history (click on history tab). It will tell you why a requisition or purchase order has been rejected.

Remember, history is the best place to look for what actions were taken or changes made to your requisition or purchase order.

14. 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.

To find out check number and date paid, go to Banner Self-Service>Finance>View Document
Choose type of purchase order and enter purchase order number. Click on "View Document", scroll to the bottom of the page and check under "Related Documents."

15. 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.

16. When looking at comments, you can choose "All" from the "Show comments for" and see comments attached to requisitions, purchase orders, receipts and invoices. Please use comments to request changes to any orders so that we will have a record of your request.

17. 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.

18. Do not enter Dell items as non-catalog items. They must either be selected from the punch-out catalog or retrieved from a quote or e-quote.

19. Please click on the "New Supplier Form" on the shopping page to submit a request for a supplier (vendor) to be added to Yo-Mart.

20. If an item is going out to bid and you don't know who the vendor will be, you can use Supplier TBD (to be determined). Click on the Supplier TBD on the shopping page and then non-catalog item OR you can select it from a supplier search. Do not use this to request a supplier be added to Yo-Mart. Those requests route differently.

21. You can receive an email or notification when your requisition completes workflow and a purchase order is created.

Go to View my profile

Notifications Preferences

Shopping, Carts & Requisitions

Click on the "edit section" in the upper right hand corner

Click the "over-ride" button beside "PR Workflow complete/PO created" and choose Notification, Email or Both