**TIPS:**

- When ordering stationery through the catalog, make sure you approve your proof or the order will not go anywhere.
- Get your Tax Determination Form approved by the Tax Office before submitting an order through SS.
- Get your Client Relations Category Manager involved with your project at the genesis of the idea. This will help speed up the contracting process and we can get all of the University’s resources involved early.
- If a vendor calls you asking about payment status, refer them to their supplier portal. If they have never registered, they are in the portal and can reach out to **smartsource@drexel.edu** so we can invite them and they can track their own POs and payments.
- NSF checking is turned to warning in Smart Source. Everyone needs a process for items in transit to avoid going over budget. Just because the system will allow you to put in an order doesn’t mean you should. Ditto for making purchases with PCard or arrangements for catering, doc-u-vault, etc. Budget matters.
- Utilize Procurement Services website—Purchasing Policies, job aids, trainings, etc.
- Telrose Orders – orders over $200 get a 2% discount; downside of that is that leaves dangling encumbrances. Manage to that by using Web*Financials Outstanding Encumbrances and email **procure@drexel.edu** to have any encumbrances that are no longer valid closed.
- !00XXXXX Payment tracking number means no check was cut but payment was sent electronically.
- Net 30 invoices pay on day 23 so that, if a check is mailed, vendors get that by 30 days.

**TRICKS**

- When searching for a vendor, use the icon of the Little Man with the Clipboard (Supplier Management), instead of the magnifying glass at the top of the webpage. It brings, back better search results.
- If you mix vendors on an RTP and one vendor has to be invited to be a supplier, then the entire RTP is on hold until that supplier has been registered. Don’t do this if you are in a hurry! This is also true if any part of the order needs additional documentation.
• You can order copy to save time! This is good, even if you only order something once a year.

• When placing a comment in Smart Source, select only the individual or individuals who need to be included. When an action is needed, please address it to a specific individual and refer to the name of the supplier. This allows those who were copied to know who is doing what to assist you.

• Before returning or rejecting a cart, put a comment into the person to whom you will be returning the cart. Copy that and then when you return/reject, in the pop-up box, you can paste it. In this way the recipient will know exactly why his/her cart has been returned and that it is not the system returning their order. (The information in the pop-up box is not distributed to anyone.)

• Updates to approval queues, once entered by my team, occur overnight. If you need to get the order out the door before that cycle completes, check the Validate FOMPROF box – that will route your order to an approver in Procurement Services who can verify that the update has been made and expedite the approval on your behalf.

• Looking at an order in Smart Source? Go to comments and select drop down ALL to get you a complete story. Some notes are Requisition, Invoice or Purchase Order.

• Job Aids can be found on the Procurement Services webpage. I google Drexel Procurement to get to http://drexel.edu/procurement/ go to Training presentations then Smart Source Trainings. 18 trainings from Overview to problem details created based on Hot Line call activity.

• Look up a document with the Magnifying Glass icon at the very top right on the main page of Smart Source Procure to Pay. Enter Requisition and get all documents related to that requisition (Requisition, Purchase Order, Invoice(s)) PO also, Invoice also, vendor invoice also... all linked.

TRAPS

• On a Confirming Order form, if you don’t check the Pay Vendor box, Accounts Payable will not receive your invoice to pay.

• If you are Requestor Plus, and you submit an RTP for less than $5K, your order will go straight out. This is important because if there is a contract to be signed it
won’t make a stop for us to review/sign it. To avoid this, assign your cart to Carmen Spears

• You cannot put multiple invoices into a Confirming Order, only the first one will get paid
• You can’t mix a non-catalog order with a catalog order in one requisition.
• You can’t mix assets (ACCT 6xxx) with non-assets (ACCT 3xxx) on the same RTP
• Attaching W9s in Smart Source
• Having vendors send you their invoices; attaching invoices to non-catalog orders
• Writing emails to edmamericas.com
• Assigning a request to an approver rather than allowing the workflow to deliver it to the approver.
• There is a delay between Banner and Smart Source when updating Smart Source Invoice Paid.
• Attaching a Quote won’t work as an invoice, while the amount may be the same, auditors want us to pay from an Invoice, not a quote.
• Invoices sent to drexel_university@edamericas.com aren’t read by a person like an email. The attachment is worked by edamericas matching a Purchase order to the correct vendor with their invoice number and dollar amount.