

UNIVERSITY OF DELAWARE[®] EXCHANGE

Contacting Procurement Help in UDX vs. procurement@udel.edu

What's the difference?

Tagging Procurement Help in a comment on a UDX Purchase Order:

UDX users can add a comment to a Purchase Order in UD Exchange and tag Procurement Help as the recipient

Tag Procurement Help on a comment in a document to request **an action on the document** that needs to be made by a system administrator.

Emailing procurement@udel.edu to open a help ticket:

UDX users can send questions about UDX that will be turned into a help ticket and assigned to a Procurement staff member to research and answer.

Send an email to procurement@udel.edu to **ask questions** about UDX processes, forms, training, policy, and anything else you may need clarification and help with!

When to tag Procurement Help in a UDX comment:

- You need to *close* a Purchase Order
- You need to *cancel* a Purchase Order
- You need to *change the owner* of a Purchase Order
- You need to *increase a closed* Purchase Order (restrictions apply)

There is a difference between closing and cancelling a PO! Please see next slide for details.

Details and instructions regarding the actions listed above are available in the [UDX Troubleshooting Tips Guide](#)



Closing or Canceling a Purchase Order

- Closed purchase orders **can** be reopened. **Close** a purchase order when:
 - A supplier is finished invoicing the PO and a balance remains
- Canceled purchase orders **cannot** be reopened. Cancellations send a revision to the supplier via e-mail to cancel. **Cancel** a purchase order when:
 - You are revoking the order and need to revise the purchase order
 - Include the verbiage you want sent to the supplier with cancellation
- For catalog orders where one or more items have been canceled, you must attach PDF documentation that this has been completed by the supplier with your request to close the purchase order.



When to tag Procurement Help in a UDX comment, continued:

- You need to respond to an inquiry from Procurement Help such as:
 - The PO dispatch failed and you are asked to provide a new email address for dispatch
 - Voucher failed because a duplicate invoice number was detected
 - Request for clarification or documentation related to your comment
- The voucher is pending approval by someone no longer with the University or otherwise unavailable and you want to provide authorization to pay



Procurement Buyers will generally tag Procurement Help when:

- PO terms or clauses need to be changed after dispatch
- The supplier requires a revision with additional attachments or clarifying verbiage on the external notes area of the PO
- Changes are necessary to the quantity/amount combination (e.g., the user entered 10 at \$100 each but checked the multi-invoice box and AP needs to be able to invoice in amounts other than in \$100 increments, so the PO must be changed to quantity of 1 at \$1000 to invoice as multi-invoice)

For assistance with these types of changes please communicate with the buyer named on the purchase order first!



When **NOT** to tag Procurement Help in a UDX comment:

- You need help understanding a process or action
 - Instead, email procurement@udel.edu or come to a drop-in help session.
- You want a document returned or rerouted
 - Instead, tag the current workflow approver to return, forward, or add an ad-hoc approver.
- As a copy of an action item for someone outside of Procurement
 - Tagging Procurement Help is *only* for **Procurement** action items and should *not* function as a cc.
- You have a question for a specific Procurement team member
 - Instead, tag that person individually (e.g., the buyer in the requisition workflow, or the AP team member who created the voucher).
- You have received an invoice aga from a vendor that needs to be paid against an existing PO
 - Instead, send the invoice to accountspayable@udel.edu.



In Summary ...

- Think of Procurement Help as an IT desk with specific technical abilities in UDX; it is staffed by users who understand the system and integration but not necessarily the policy or processes behind it.
- The email address used by Procurement Help is also used for technical failures in UDX but is not staffed to answer questions.
 - If you are receiving a persistent error message you may receive an email letting you know how or when the error can be resolved, but any training questions received by Procurement Help will be forwarded to procurement@udel.edu for resolution.



Resources

[Procurement Services](#)

procurement@udel.edu

[Troubleshooting Tips](#)

[Auto-Return Troubleshooting Tips](#)

