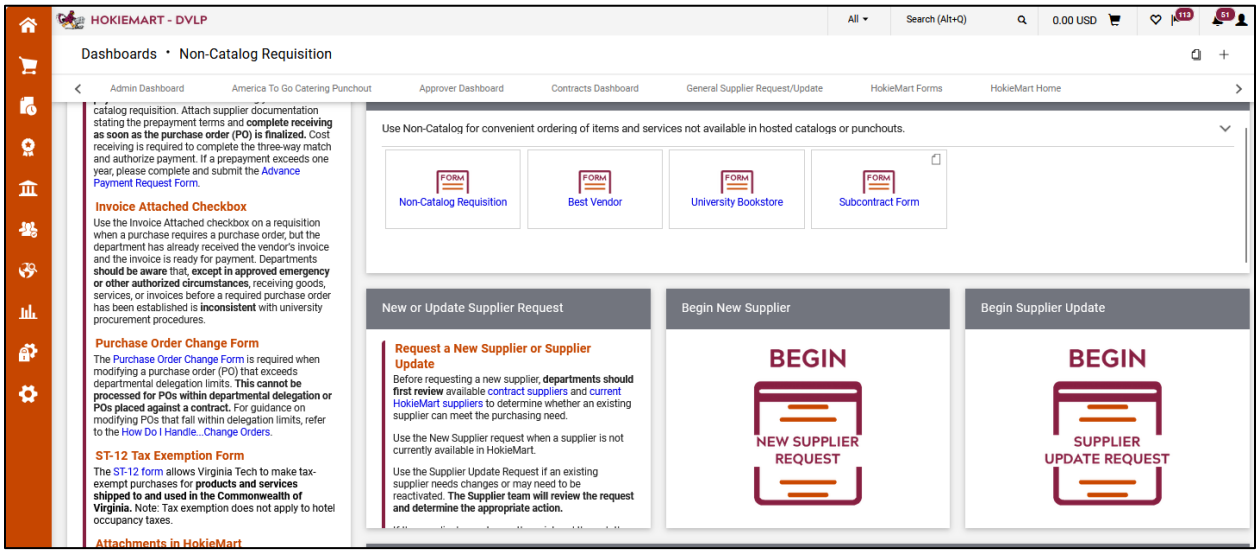
Additional Actions

Adding a New Supplier or Updating a Supplier

Departments should purchase from contract suppliers when possible, however, sometimes the need arises to use a supplier that is not currently active in HokieMart.

New suppliers can be requested using the N**ew Supplier Request** Form. Updates to existing supplies can be requested through the **Supplier Update Request** Form. These forms can be used to create or update both people and businesses. If a new internal supplier (VT entity) is needed for use on the Interdepartmental Service Request form, please contact General Accounting.

On the **Non-Catalog Requisition Dashboard**, select the tile for the action you are requesting. Use the Supplier Update Request form if you want to reactivate an existing supplier, but no other changes are needed.



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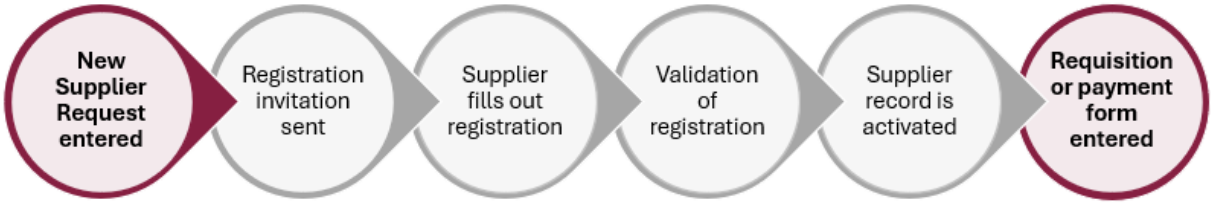
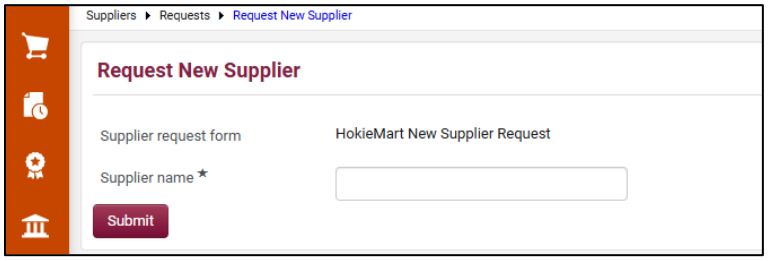
New Supplier Request

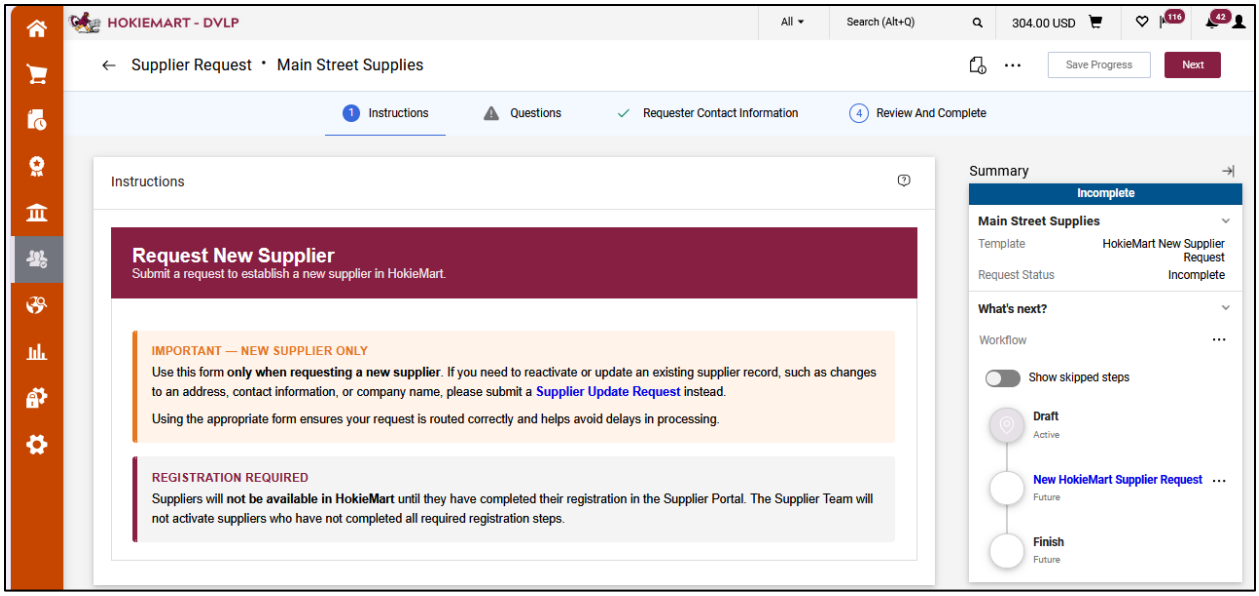
A new supplier can be requested when there is no existing supplier in HokieMart that can fulfill a department's purchasing needs. Upon submitting a New Supplier Request form, the Supplier team in Procurement will evaluate the request. If approved, they will send the prospective supplier an invitation to register. Suppliers will use the link in the invitation email to create an account within the HokieMart system. Once registration information is submitted by the supplier, the appropriate administrative areas within Virginia Tech Finance will validate the information and approve the registration. Upon approval of the registration, the supplier record will be activated for shopping.



To begin, navigate to the **Non-Catalog Requisition dashboard** and select the **New Supplier Request Form**. Requestors should then type in the supplier's name.



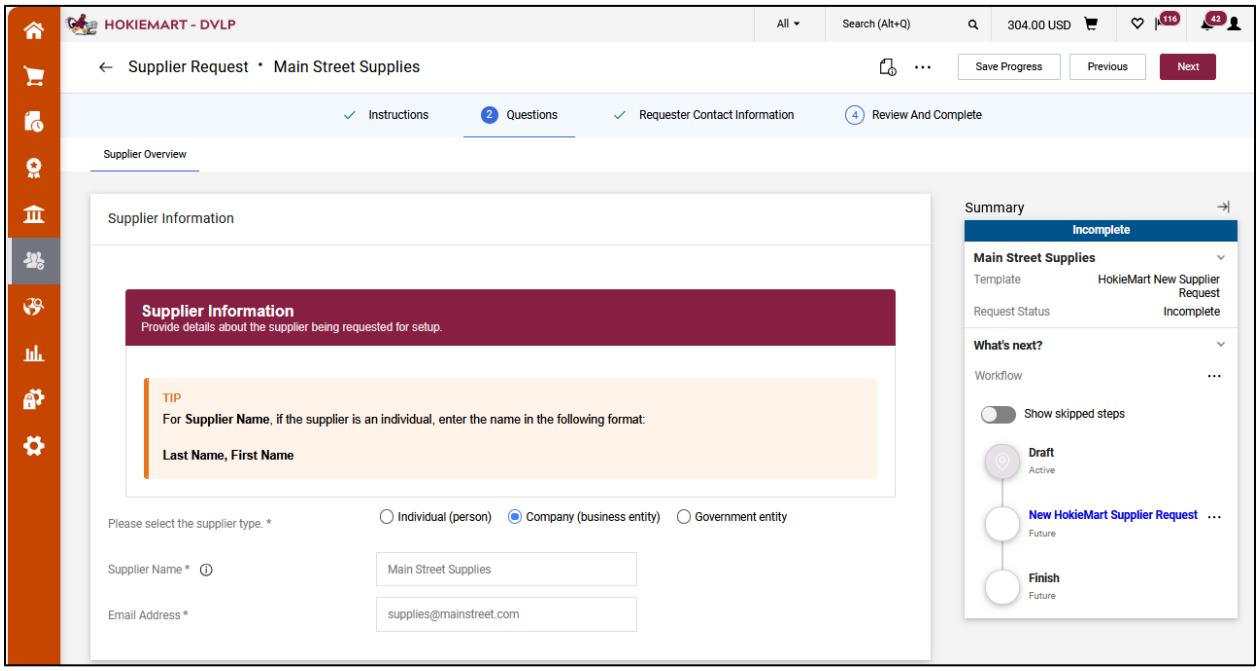
This will open the form. The first page of the form contains instructions and helpful reminders. Use the tabs along the top of the form to move through each page before submitting the request. The workflow on the right-hand side allows visibility into the status of the request.



Minimal information is needed from the department to send a new supplier request for individuals or companies. Users will provide the following information:

- The supplier name
- An email address to send the registration invitation to
- A description of the goods or services provided by the supplier

If users are requesting a government entity, additional information, such as the W8/W9 document, physical address, and payment address, will be collected on the request form.



Users will verify their contact information and review the form for completeness before submitting. Once a request form is submitted and approved by the Supplier Team, an invitation to register will be sent to the supplier.

If there are extenuating circumstances where a supplier may not be able to register, but still needs to be set up in HokieMart, departments are encouraged to enter a new supplier request form and contact Procurement at supplier@vt.edu to discuss alternative arrangements.

Users will be notified via email when their form is approved, and the registration link has been sent to the supplier. An additional notification will be sent to the user when their supplier's registration has been approved and the supplier is active for shopping.

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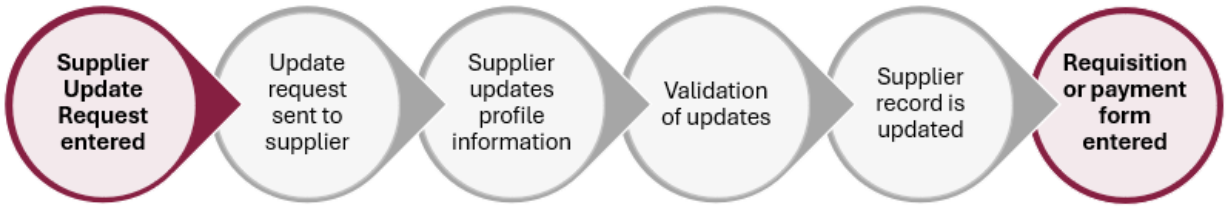
Supplier Update Request

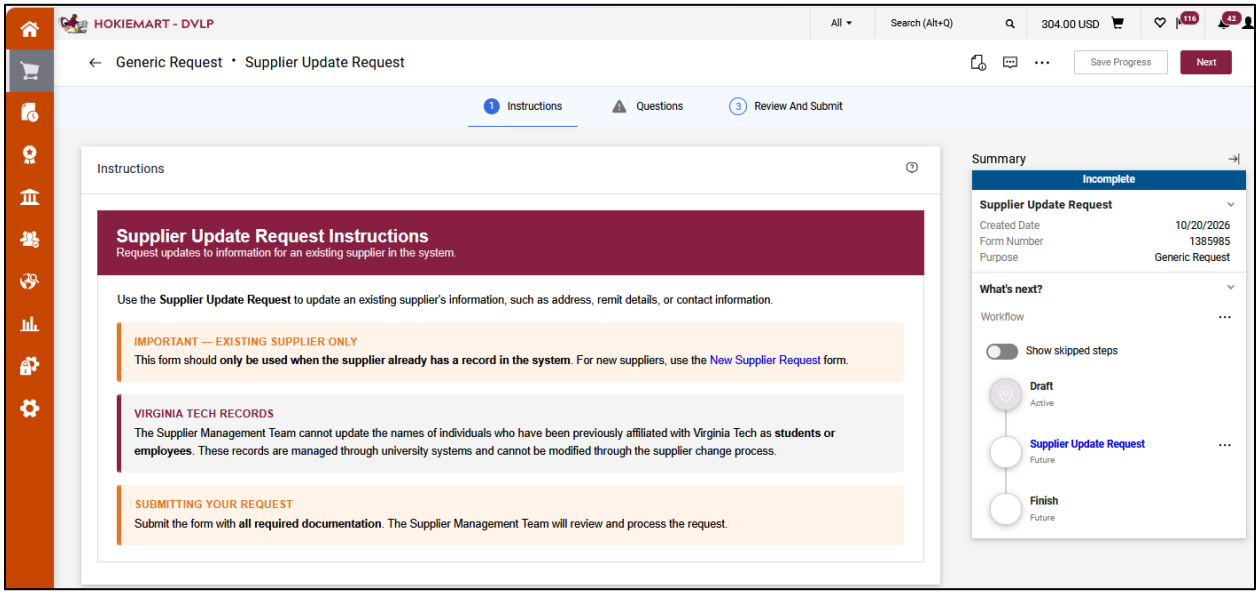
Updates to supplier records can be requested through the Supplier Update Request Form located on the Non-Catalog Requisition dashboard in HokieMart. This form can also be used to request reactivation of an existing supplier.

Upon submitting a Supplier Update Request form, the Supplier team in Procurement will evaluate the request and send a request to the supplier to update their information. Suppliers will be notified via email of the request and will be instructed to log in to their existing supplier portal and submit updated information.

Once updated information is submitted by the supplier, the appropriate administrative areas within Virginia Tech Finance will validate the information and approve the updates. Upon approval of the updated profile information, the supplier record will be updated.

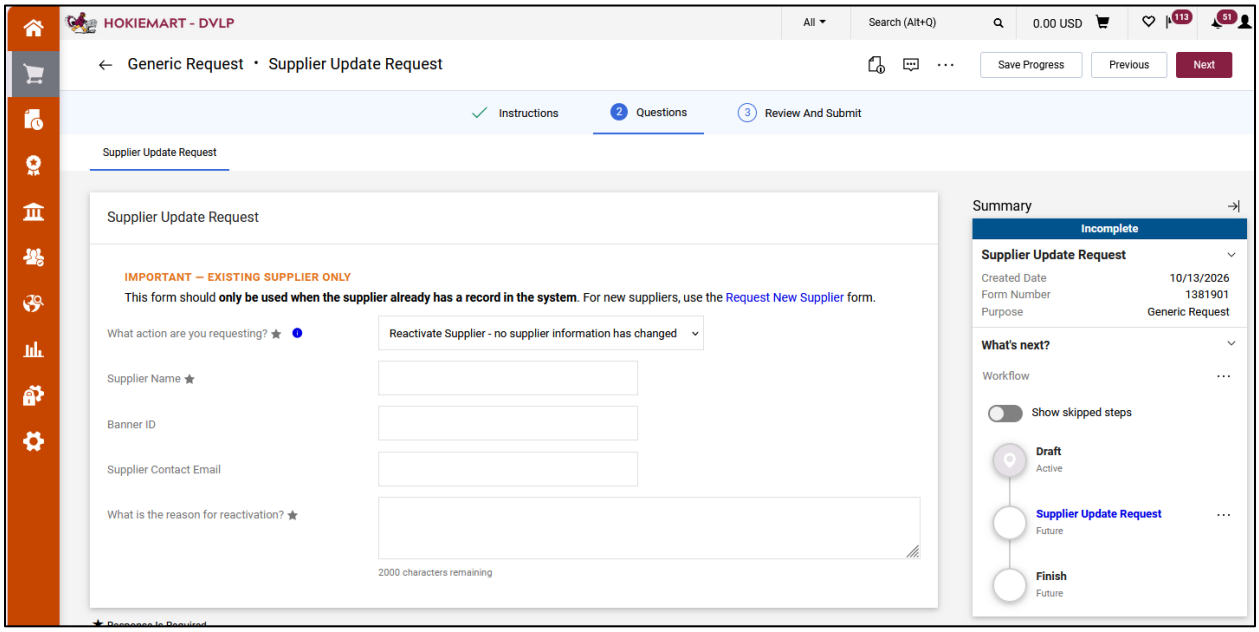


To begin, select the Supplier Update Request Form. Requestors should review the first page of the form, containing instructions and helpful reminders. Use the tabs along the top of the form to move through each page before submitting the request. The workflow on the right-hand side allows visibility into the status of the request.



Minimal information is needed from the department to send the supplier a request to update their information. Users will provide the following information:

- Request type – either Update Existing Supplier Record or Reactivate a Supplier Record
- The Supplier name
- Banner ID (if known)
- An email address to send the update to (if known)
- A description of what needs to be updated or the reactivation reason



Users will verify their contact information and review the form for completeness before submitting. Once a request form is submitted and approved by the Supplier Team, a request to update their information will be sent to the supplier.

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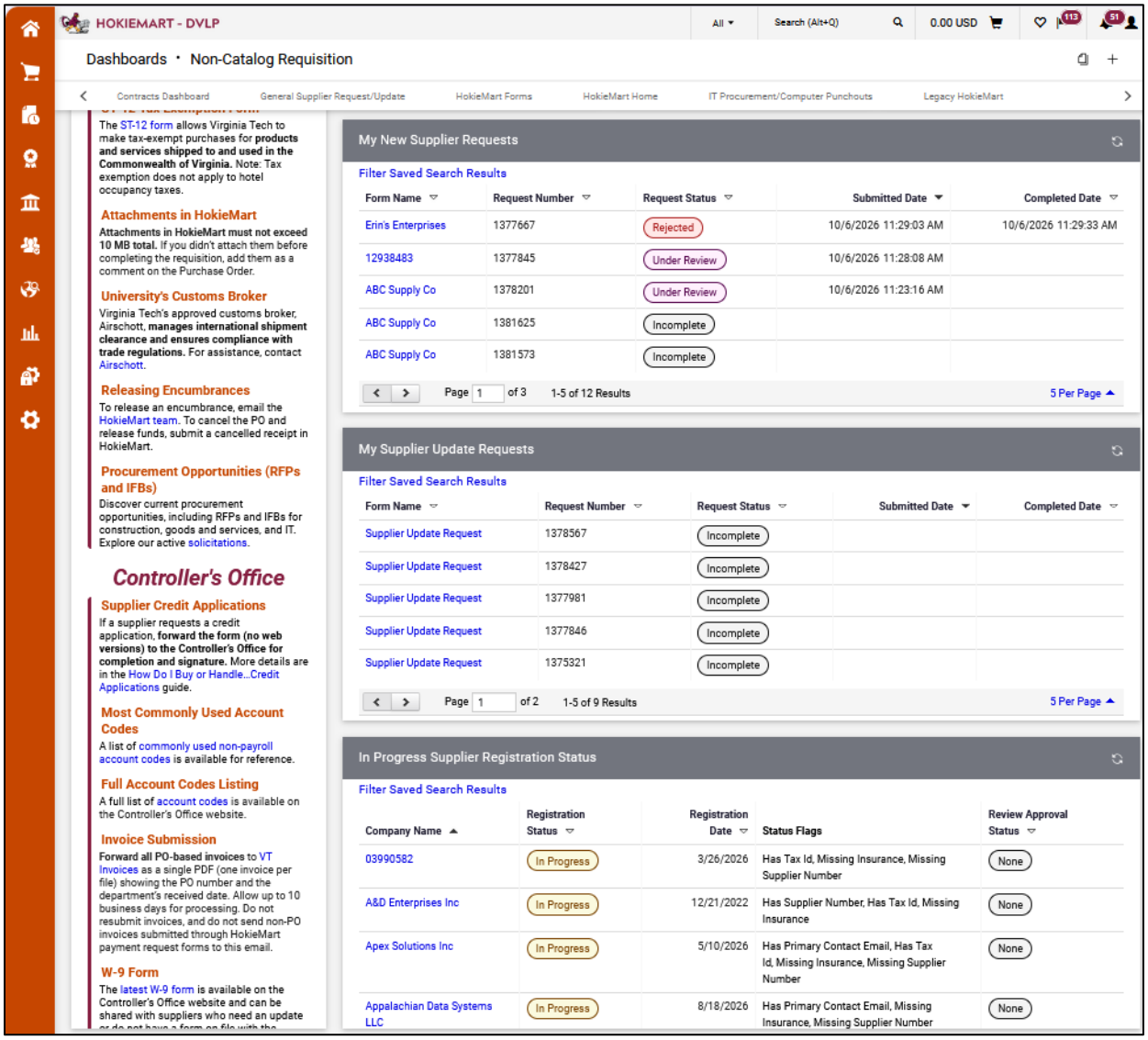
Tracking Requests

Users can track the status of their new supplier requests and supplier update requests directly on the non-catalog requisition dashboard. HokieMart users can also view all supplier registrations currently in progress, regardless of who initiated the request.



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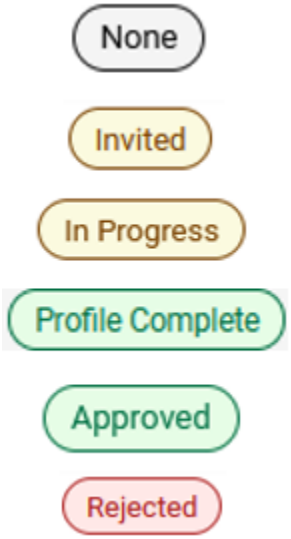
Supplier status indicates where a supplier is in the registration process and can help a user determine if they are active for shopping.



None – supplier has not yet been invited to register (all suppliers will start with this status)

Invited – supplier has been invited to register but has not begun registration

In Progress – supplier is working on their registration

Profile Complete – registration is completed but not yet approved

Approved – registration has been approved by Virginia Tech

Rejected – registration was not approved and supplier cannot be used for shopping

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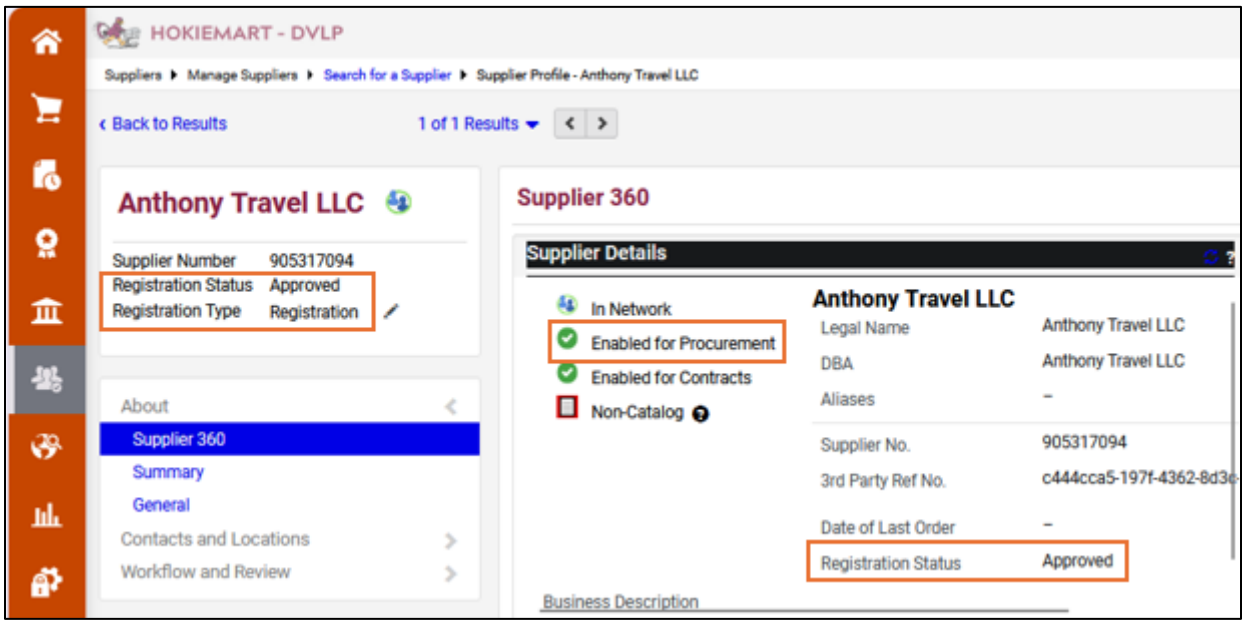
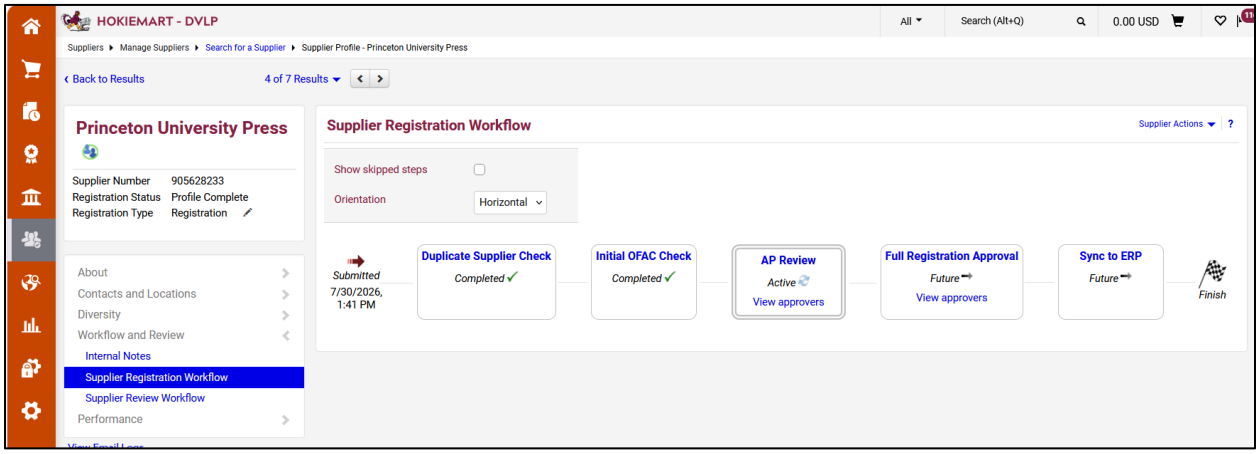
Users can view the status of a supplier by looking at their supplier profile or on the supplier 360 summary. A green check mark next to **Enabled for Procurement**, along with a Registration Status of **Approved**, means that the supplier has fully completed registration, and the supplier is active for shopping.



The Supplier Registration Workflow shows the approval steps that a registration must go through before a supplier can be made active for shopping. This workflow includes data validation and compliance approval steps, such as Office of Foreign Assets Control (OFAC) checks, Accounts Payable review, Tax Compliance review, and Supplier Team review.

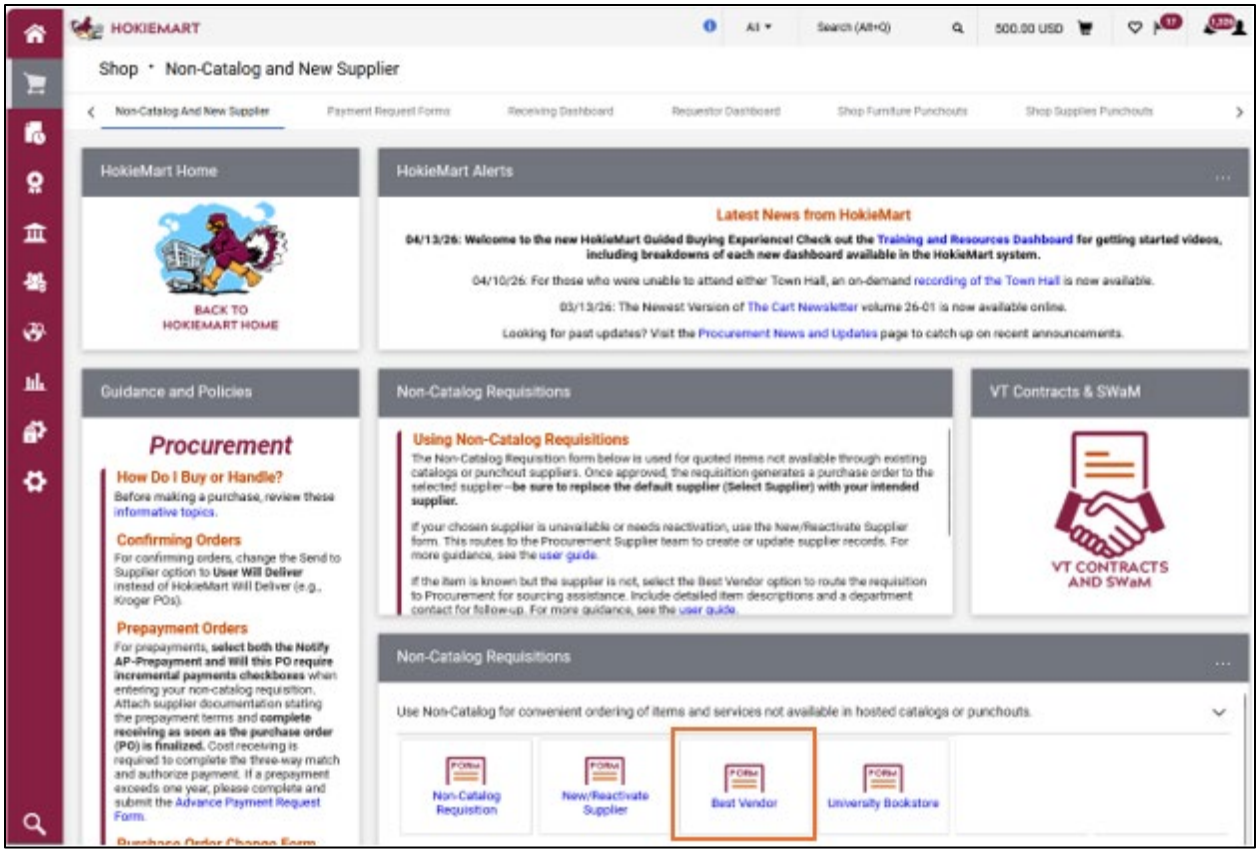
Departments can also view the Supplier Registration Workflow to see approval steps needed for updated information submissions.



Best Vendor

When a department knows the item(s) that need to be ordered but are unsure of a supplier, a buyer in the Procurement Department can assist with supplier selection. For the document to be routed to Procurement, Requestors should create a Best Vendor non-catalog requisition.

On the **Non-Catalog Requisition Dashboard**, select the tile for **Best Vendor**. This will open a non-catalog form with a supplier called “Best Vendor” preloaded into the supplier field.



Type in the line-item information and best estimate of the price. Requestors should provide a detailed description of the purchase and list an appropriate contact in their department for the Procurement Buyer to discuss the needs.

Requisitions with Best Vendor as the supplier will route to the Procurement Department in requisition workflow after obtaining all appropriate reviews.

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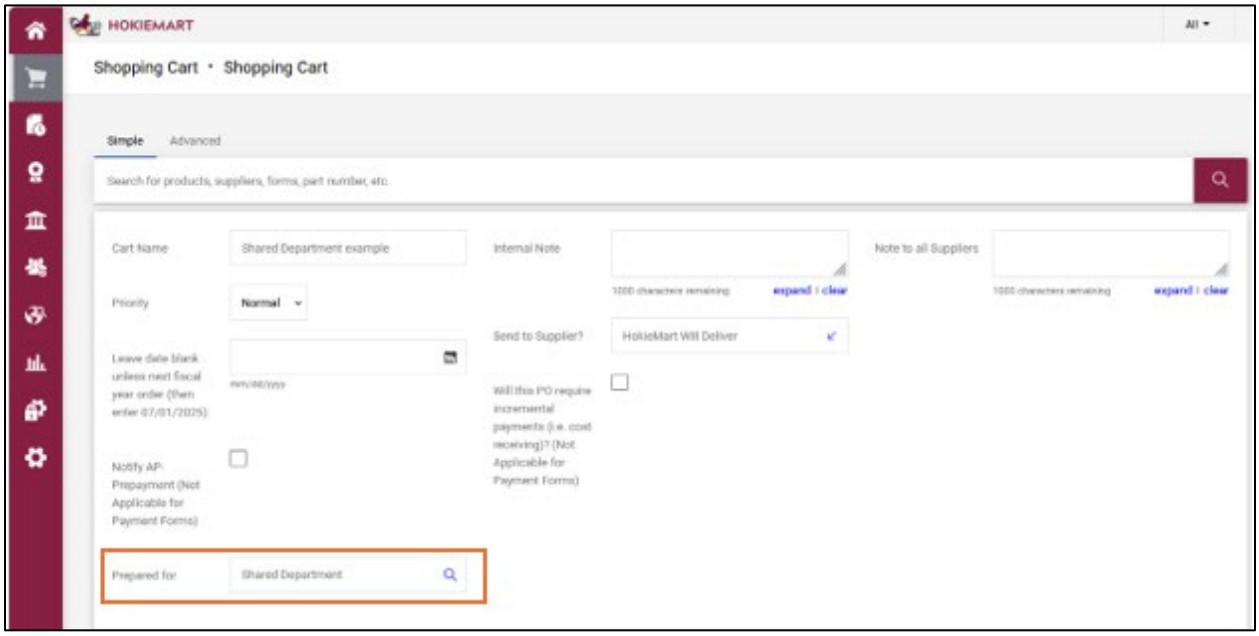
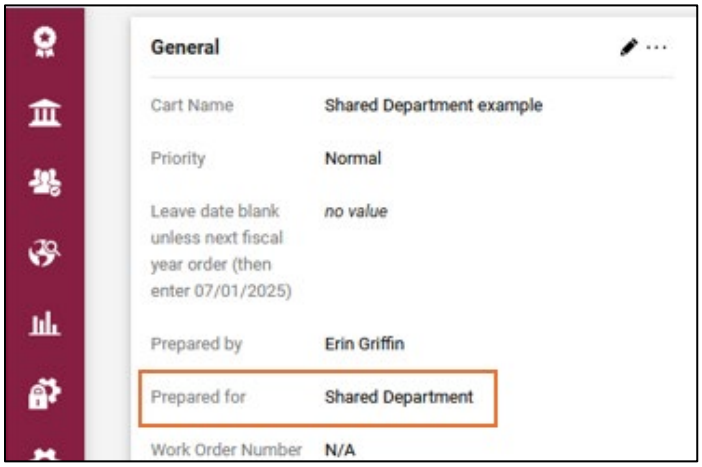
Shared Department (or On Behalf Of)

The purpose of a Shared Department requisition is to allow multiple departments to share the cost of goods or services when the Requestor does not have access to all required fund sources. Using the Shared Department option allows the Requestor to continue creating the order while ensuring the requisition is routed to the appropriate organization-level approvers for each funding source used.

If a Requestor submits a requisition for themselves using a fund source they are not authorized to access, the system will reject the requisition. To avoid this issue, the Requestor can change the requisition to be prepared on behalf of another user or select the **Shared Department** user. This can be updated in the **Prepared For** field in the shopping cart or in the **General** section of the draft requisition.





Shared department requisitions can be tracked using the **My Shared Department Completed/Rejected Purchase Orders** search widget on the **Requestor Dashboard**.

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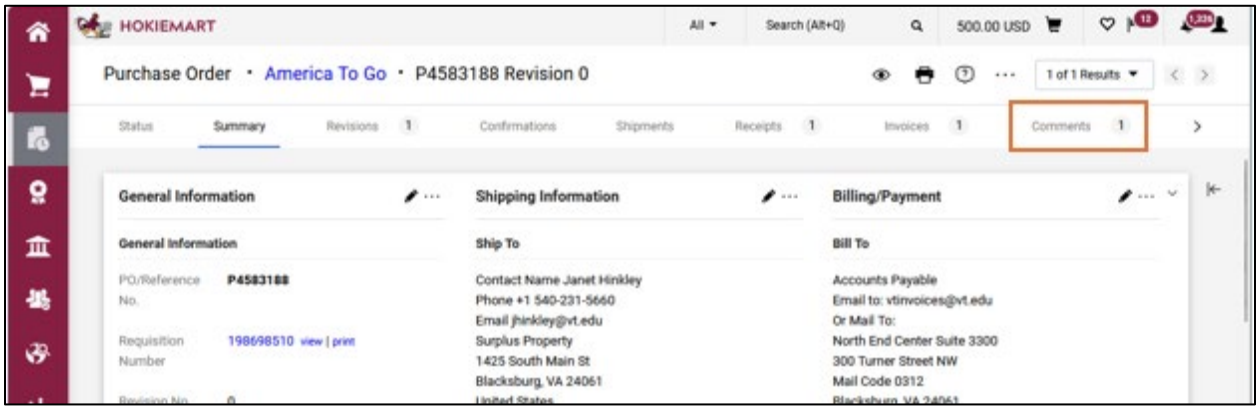
Adding a Comment

HokieMart users can add comments to documents. If designated, notification of a comment can be emailed to other selected HokieMart users. Comments can only be emailed to active users in the system.

Examples of situations where a comment might be useful are:

- To provide Accounts Payable with clarifying information on the transaction
- To add an attachment
- To remind a user to complete receiving

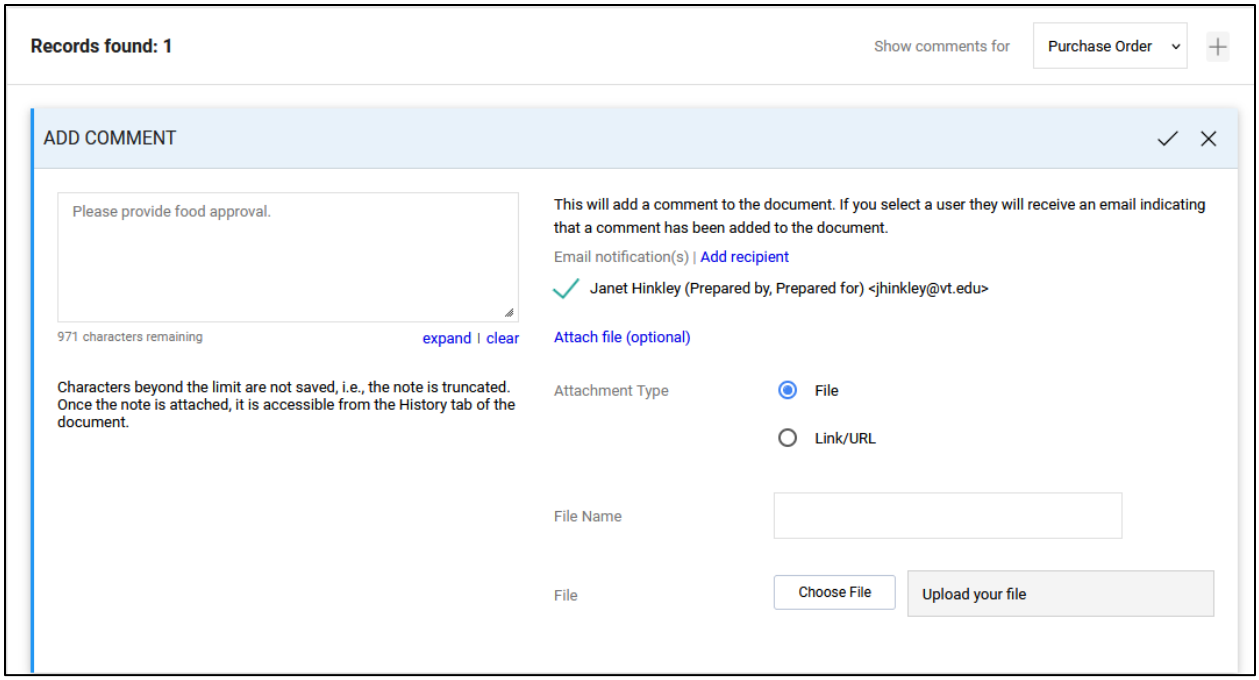
To add or view a comment, select the Comments tab on any document.



Any comments made will be listed on the **Comments** tab with the user's name, time stamp of the comment, text, and any attachments or users notified if applicable.

To create a new comment, select the **plus** icon on the **Comments** tab.

- Type in the text to display on the document.
- Select any users to notify via email of the comment. To search for additional users to notify, select **Add recipient** and search for the desired user.
- Files can be uploaded as internal attachments through the comment, or if file size is exceeded, a link to additional attachments can be added.



Select the **check mark** at the top right-hand corner of the comment to post it to the document. Comments cannot be deleted from the document once they are posted.

State Council of Higher Education for Virginia (SCHEV) Orders

The Procurement Department processes HokieMart requisitions for approved Equipment Trust Fund (ETF) equipment using the same procurement protocol for competition and acquisition as all other non-ETF equipment.

Follow the standard process for entering a requisition into the system. In the external notes and attachments field, type in ETF= and the SCHEV number.

It is critical that when entering multiple SCHEV numbers that they be entered exactly as shown below (with no spaces inserted in the SCHEV number).

- Order for one fixed asset (one SCHEV number): **ETF=2080640151**
- Order containing multiple fixed assets in a given range (the range below would account for 4015, 4016, 4017, 4018, 4019, 4020, 4021):

  ETF=2080640151,2080640171,2080640211
- Order containing multiple fixed assets not in a consistent range: **ETF=2080640151,2080640171,2080640211**

SCHEV orders to the same supplier should be consolidated to one PO if possible, rather than placing a separate PO for each item ordered on SCHEV funding to the same supplier.

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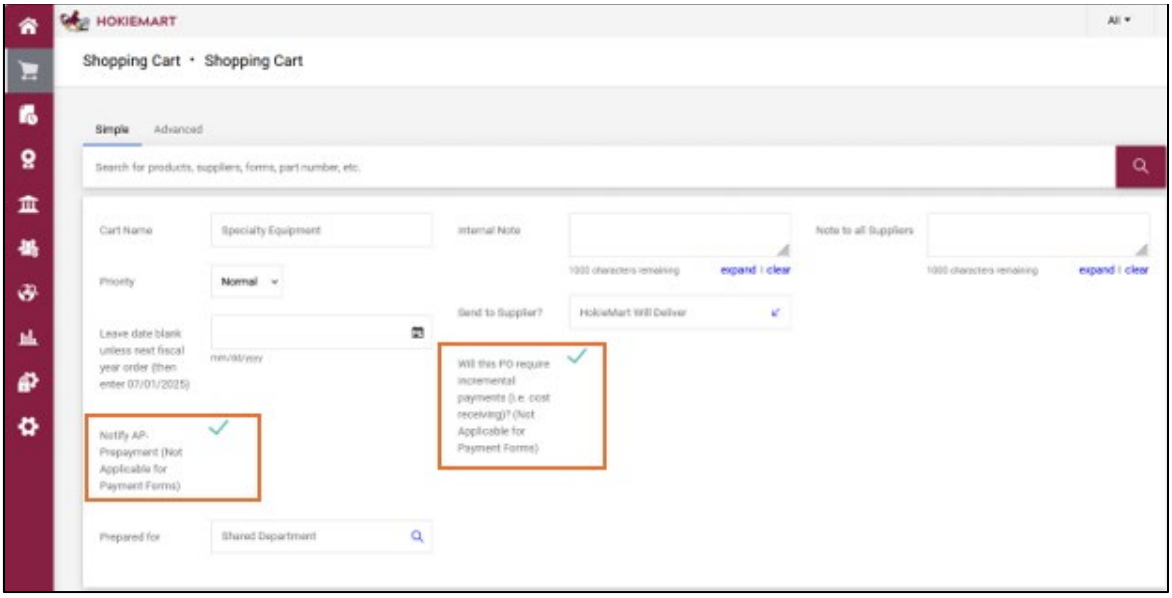
Prepayments

AP-Prepayment Notification is a feature that alerts the Accounts Payable department that a check must be issued to a supplier prior to receipt of goods and/or services purchased on a PO.

Although it is not a best practice of the university to prepay for goods and/or service, there are times a supplier must be paid in advance, such as a partial deposit payment for equipment that must be manufactured.

On the shopping cart, Requestors can select the **Notify AP-Prepayment** field to insert a step in the requisition workflow of approvals to notify Accounts Payable of the prepayment.

Prepayments require cost receipts to be performed for payment to be issued. Requestors must also select the **Incremental Payments** field to submit a requisition with prepayment.



Prepayments can only be made on non-catalog requisitions, and line items must be entered with a quantity of one.

The HokieMart system will automatically generate an e-invoice for purchase orders that require prepayment. Receivers should immediately perform a cost receipt on the purchase order for the amount of the prepayment. **This cost receipt is necessary for the prepayment to be issued.**

When the balance is due on the purchase order, the Receiver should send their invoice in to Accounts Payable and complete the receiving action for the remaining payment.