

## **Marketplace 101 Webinar**

**03/17/2023**

### **Q&A**

**Q: What if I work with different speedtypes, can I use more than one in Marketplace?**

**A:** You can always add more speedtypes to your requisition. The example in the webinar just used one speedtype.

**Q: Should we use our department's physical address as the Shipping Address for paying invoices for consultants to Pls on sponsored projects?**

**A:** You must have a ship-to address listed however this is primarily for use when getting goods shipped to you.

**Q: Why would we want a smaller encumbrance than the amount of the total contract?**

**A:** For this example, say you have a 5-year contract, and you did not want to encumber the full amount. In this example, this is a \$500,000 contract over a 5-year term. Every year, your budget re-ups so you really want to submit a change order to have only \$100,000 available each year. That way you do not need to encumber the full dollar amount of the contract over the life of the contract.

**Q: What attachments are required for the SPO?**

**A:** It depends on what you are purchasing. If you are purchasing off a contract, you will just need a quote from your supplier, not the SSPR form. If your purchase is a one-off, then you will need the SSPR – Source Selection Price Reasonability form – that can be found on our website under the forms page. More specifically, if you are procuring something for IT and there is going to be a data exchange or something to do with accessibility software, depending on your campus, you're going to need a security review – either from an ICT office or RAQ office.

**Q: Will there ever be a consideration to add multiple lines to an SPO?**

**A:** From an invoicing perspective, we have an SPO allocation form which allows AP to allocate invoices correctly. If you start adding multiple lines, the encumbrances can get confused. If you have one more than one open line on an SPO, an expense may not be invoiced correctly against your SPO because AP will automatically invoice against the first open line that has not been fully invoiced. The only exception is for subcontract SPOs.

**Q: Why doesn't the box on the right show the total amount of the SPO, which is 30k?**

**A:** The box on the right is only the encumbered amount. The encumbered amount is the only field that goes to the finance system. If you have a multi-year contract and you only want to encumber one year's worth, then you can put that amount instead.

**Q: How can I pay if there is no PO?**

**A:** You can use the Payment Voucher form for some purchases. For more information about what is allowed on the Payment voucher, please refer to the policy:

<https://www.cu.edu/psc/policies/psc-procedural-statement-payment-voucher->

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[authorization](#). Otherwise, a purchase order is required in advance of purchases made through CU Marketplace.

**Q: If I'm not sure which catalog to search within, is there a feature where you can search ALL catalogs for a specific item?**

**A:** On every dashboard, wherever there is a catalog tile, such as Staples, Fisher, etc., there is a search box above that section where you can search by products, item#, etc.

**Q: Follow up on searching all catalogs: how do you know which Item Number to search, is there a master list of item numbers?**

**A:** You do not have to know the item# to search either by individual catalog or in the search box mentioned above. There is no master list.

**Q: Is there a way to ask Marketplace not to send the PO to a vendor?**

**A:** We cannot turn off sends to the suppliers. If a supplier has an email set up in their supplier record, all emails will be sent to that email address listed. The exception is if you use the Payment Voucher form. For more information about what is allowed on the Payment Voucher go here: <https://www.cu.edu/psc/cu-marketplace-how-creating-payment-vouchers-cu-marketplace>.

**Q: When I have an existing SPO, do I need to upload an invoice against the SPO to Marketplace, or just send it to APInvoice?**

**A:** For any noncatalog PO/SPO, the invoice should be sent to APInvoice@cu.edu with that PO number indicated on the invoice document. Uploading to the SPO is unnecessary.

**Q: If I accidentally over or under receive on a receipt can I edit or delete a receipt?**

**A:** Over-receiving will not affect the outcome if it was received more than the quantity. If you need to reverse it, though, you can do another receiving for a negative amount. To correct an under-received amount, do another receipt for the difference.

**Q: Do we have a report showing match exceptions?**

**A:** There is no match exception report available. The Invoice Approver for the speedtype will get notified of match exceptions and the voucher will be stopped on that step in the workflow. You can also search for match exceptions, filter the search by payable status and choose *In Process*.

**Q: If I am sent a shopping cart, and want to assign it to another person, can I assign it to an approver for a review before further action is taken?**

**A:** Shopping carts can only be reassigned to other requestors. If the person is a requestor, you can reassign it. You cannot reassign to an approver.

**Q: Do we have a query manager in Marketplace?**

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**A:** There is no tool called 'query manager' but you can search for all items and filter your search.

**Q:** I get an invoice from a current vendor. It's for \$10K. What's the process to get it paid?

**A:** Make sure the PO# is showing on the invoice, then scan and email it to [APInvoice@cu.edu](mailto:APInvoice@cu.edu).

**Q:** Can you explain the difference between internal and external attachments when doing something like a payment voucher? I'm unsure which I should use when attaching invoices for the voucher.

**A:** In general, the difference between an internal and external attachment is that the external attachment is sent to the supplier when the PO is distributed. If you use the Payment Voucher form, however, since there is no PO to be sent to the supplier, there is no use for an external attachment.

**Q:** What is the difference between Sole Source Justification form and SPO Sole Source Request?

**A:** The difference is the type of form. The SSJ form is a non-catalog form primarily used for ed for one-time purchases. The SPO SSJ form is a standing purchase order, which is a multiple use PO over time – for example, multi-year contracts.