

Step-by-Step Guide

Solutions for PVs That Can't be Processed in CU Marketplace

In This Guide

There are several reasons for a Payment Voucher (PV) to not be processed. This guide discusses:

- ✓ Some of the main reasons and how to avoid them in the future
- ✓ Corresponding solutions so your current request can be processed

If your PV cannot be processed in its current state, the PSC Payable Services technician will add a comment to your PV voucher within CU Marketplace indicating why. The Requestor will receive an email notification that a comment has been added.

Reason #1: PV is not the appropriate method of procurement

The PV is a highly-restricted method of procurement used to process invoices when a purchase order or other commitment voucher is not applicable. The PSC Procedural Statement [Payment Voucher/Authorization](#) details allowable PV goods and services, including documentation requirements and allowable conditions.

The Payment Voucher form in CU Marketplace has a dropdown list of allowable PV uses. If your purchase isn't in the list, the PV is not the appropriate method of procurement.

Solution: Create a shopping cart using the Non-Catalog Form. Step-by-step instructions are available on the [PSC website](#).

Once you have a PO # for your non-catalog purchase, note the PO # on the invoice and email the invoice to APIInvoice@cu.edu.

Reason #2: Multiple invoices attached to one PV

There should be only one invoice attached per Payment Voucher Form.

Solution: Start over. Create and submit one PV for each invoice. Refer to the Step-by-Step Guide [Creating Payment Vouchers in CU Marketplace](#) for further information on the PV process from start to finish.

Reason #3: Incomplete information or documentation

Documentation requirements are detailed in the PSC Procedural Statement [Payment Voucher/Authorization](#).

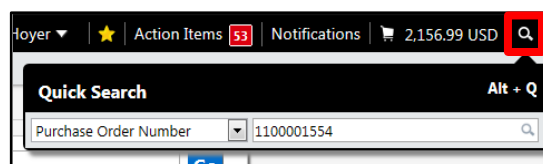
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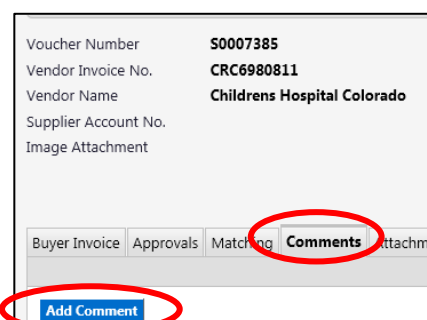
Solution: Provide the additional information/documentation by adding a comment within CU Marketplace to your PV **voucher**.

To do this:

1. Locate your PV voucher within CU Marketplace. One way to do this is to use the Quick Search located in the upper right corner of your screen. Click the Quick Search icon. Use the dropdown to select *Voucher Number* and enter the voucher in the next field; click the **Search** button.



2. Once the voucher is displays, go to the **Comments** tab.
3. Click the **Add Comment** button.



4. Enter a comment to provide further information and, if needed, attach documentation.

Be sure to check the box next to the Payable Services technician's name so he or she is notified when you add the comment.

5. Click the **Add Comment** button.

If the needed information/documentation isn't added to the voucher in the appropriate timeframe, you will need to submit a new PV. Refer to Reason #4, below, for step-by-step instructions on copying a Payment Voucher Form for resubmission. Remember to include the information/documentation missing from the first submission. *This also holds true if the Payable Services technician isn't notified when the comment is added to the voucher.*

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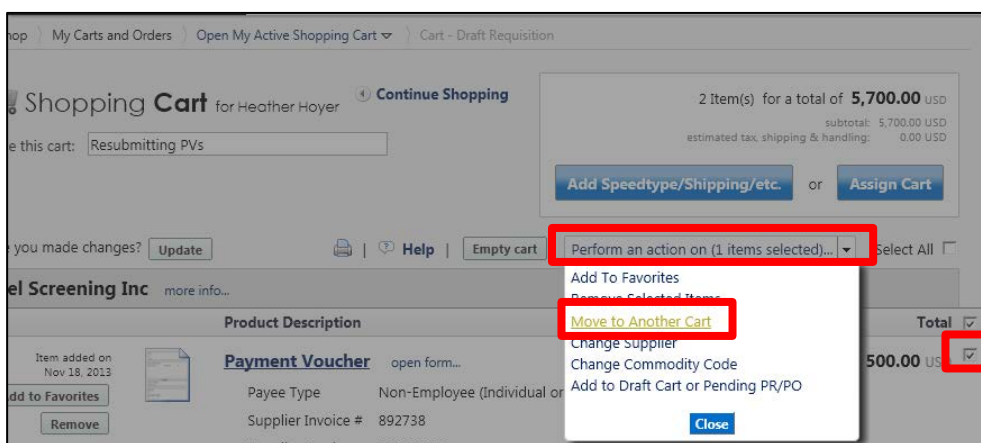
Reason #4: Multiple PVs in one shopping cart

There should be only one Payment Voucher Form per shopping cart.

Solution: Copy each Payment Voucher Form into its own shopping cart and resubmit.

To do this:

1. Locate the requisition that contains your PVs. One way is to use your side navigation bar to go to **Shop > My Carts and Orders > View My Orders (Last 90 Days)**. A list of your requisitions over the past 90 days will appear – select the appropriate requisition from the list.
2. Once your requisition is displayed, use the **Available Actions** dropdown (located in the upper right corner of the page) to select *Copy to New Cart*.
3. Click the **Go** button.
4. The items and information from the original requisition are added to a new shopping cart.
5. Scroll down to the first PV listed and check the box on the right side of the line.
6. Use the **Perform an action on** dropdown to select *Move to Another Cart*.

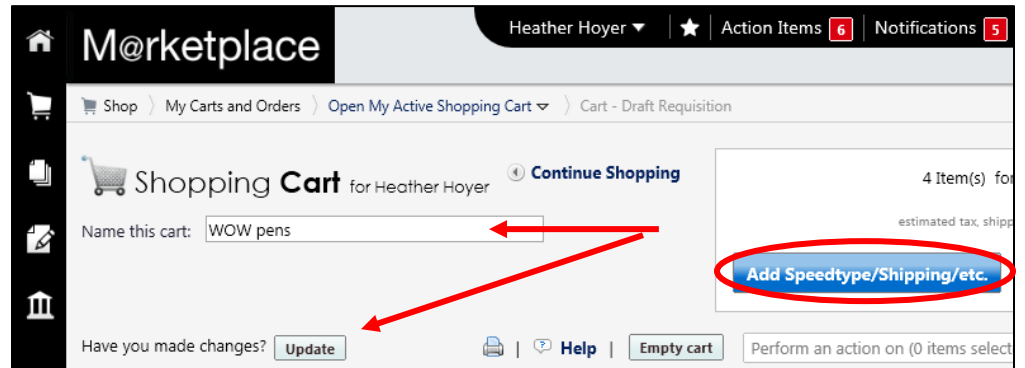


7. A pop-up window appears. Select *Move to new cart* and click the **Move** button.
8. Repeat steps 5-7 until only one PV remains in this cart for resubmission.
9. Each PV is now in its own shopping cart ready for submission. Use your side navigation bar to go to **Shop > My Carts and Orders > View Draft Shopping Carts**. Select a draft shopping cart from the list.

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10. We recommend that you enter a unique shopping cart **Name** to easily identify or search for your shopping cart. If you do, click the **Update** button to save your shopping cart's new name.



11. Finalize the shopping cart. For more information, visit one of the following Step-by-Step Guides:
- Shoppers – [Assigning Shopping Cart to Requestors](#)
 - Requestors – [Finalizing Shopping Carts \(Adding SpeedTypes, Shipping, etc.\)](#)

12. Repeat steps 9-11 to submit each shopping cart containing a single PV that was created from your initial shopping cart.