



## **Finance Transformer**

### **Purchase to Pay**

#### **Automated Email Issue of Purchase Orders**

## Introduction

New functionality has been introduced to MyFinance from 29 April 2020 that enables an approved non-catalogue purchase order (PO) to be emailed automatically to the relevant supplier, using either the default address attached to the account or a specific address entered by the requisitioner. This replaces the previous multi-step process and reduces the administration attached to processing 125,000 purchase orders per annum.

E-Marketplace catalogue orders are unaffected by this new functionality; they are already automatically sent to the relevant supplier following approval.

This guide explains how to use this new functionality. It assumes you have the iProcurement responsibility within MyFinance and are a key member of the project code you wish to charge (if you are not a key member, please liaise with your Departmental Administrator who can request you are given access if appropriate).

## Automated Email Issue of PO

1. Go to your iProcurement responsibility in MyFinance and select non-catalogue request. A new PO Email Address field has been added to this form. If the email address populated against the supplier record is ok, proceed with the standard requisition process and a PDF of the PO will be emailed to the supplier following requisition approval. An email notification will be sent to the requisitioner confirming that the PO has been sent and the email address it has been sent to.

The screenshot shows the Oracle iProcurement 'Non-Catalog Request' form. The 'PO Email Address' field is highlighted with a green box. The form includes fields for Item Type (Goods billed by quantity), Item Description (Laboratory Coats), Category (Medical & Laboratory cog), Quantity (10), Unit of Measure (Each), Unit Price (100), and Currency (GBP). The Supplier Name is ANACHEM LTD and the Site is NON-CATALOG REQ. The PO Email Address field contains sales@anachem.co.uk. A shopping cart is visible on the right side of the page.

2. The standard supplier email address can be updated to a UCL email address if you do not want the PO to be sent directly to the supplier. Following requisition approval a PDF of the PO will be emailed to the UCL email address and an email notification will be sent to the requisitioner confirming that the PO has been sent and the email address it has been sent to. Please note this is PO specific and will not be retained in the system against the supplier record. If you need to change a PO email address permanently, please email [newsuppliers@ucl.ac.uk](mailto:newsuppliers@ucl.ac.uk)

The screenshot shows the Oracle iProcurement 'Non-Catalog Request' form with the 'PO Email Address' field updated to a.smith@ucl.ac.uk. The field is highlighted with a green box. All other form fields and the shopping cart remain the same as in the previous screenshot.

- If the PO email address field is blank it can be populated with the supplier email address. If the field is left blank and the requisition submitted, a PDF of the PO will be emailed to the requisitioner. We recommend entering a supplier email address wherever possible as this reduces the administration attached to the requisition process.

Please note this is PO specific and will not be retained in the system against the supplier record. Accounts Payable will be gradually adding email addresses to supplier records starting with suppliers with the highest volume of transactions, therefore, there will be several suppliers without a PO email address until the database is updated.

The screenshot shows the Oracle iProcurement 'Non-Catalog Request' form. The 'PO Email Address' field is empty and highlighted with a green box. The form includes fields for Item Type (Goods billed by quantity), Item Description (Laboratory Coats), Category (Medical & Laboratory cos), Quantity (10), Unit of Measure (Each), Unit Price (100), and Currency (GBP). The Supplier Name is ANACHEM LTD and the Site is NON-CATALOG REQ. A tooltip for the PO Email Address field states: 'When a requisition is approved the PO will be sent to this email address if populated. If this field is blank or incorrect, please enter or overwrite with the email address you wish the PO to be sent to. This can be a UCL email address if you want to prevent the PO being sent directly to the supplier.'

The screenshot shows the same Oracle iProcurement 'Non-Catalog Request' form, but the 'PO Email Address' field is now populated with 'sales@anachem.co.uk' and is highlighted with a green box. All other form fields and the supplier information remain the same as in the previous screenshot.