

**Draft Requisition:** Draft requisitions are orders that have been checked out of UT Market and transferred to FRMS by a departmental buyer. The buyer will then create official requisition documents from the draft requisitions. When requisitions are final approved, purchase orders are electronically dispatched to the suppliers. Departments should not call, e-mail, or fax UT Market purchase orders to suppliers as these actions will create duplicate orders.

## Procurement Tab in FRMS

### eCommerce

- **Shopping** – Vendor Listing, click on UT Market Logo
- **UT Market Cart Search** – **Checked out by (EID): >>List Carts**  
displays carts that departmental buyers have checked out of UT Market
- **UT Market Cart Details** – **Cart ID [input] >> Get Cart Details**  
displays draft requisitions and requisition docs Dept buyer (checked out carts) creates requisitions from draft carts.

### Requisition

- **UT Market Document** – **Document ID [input] >> View Document**

### PO (Purchase Orders)

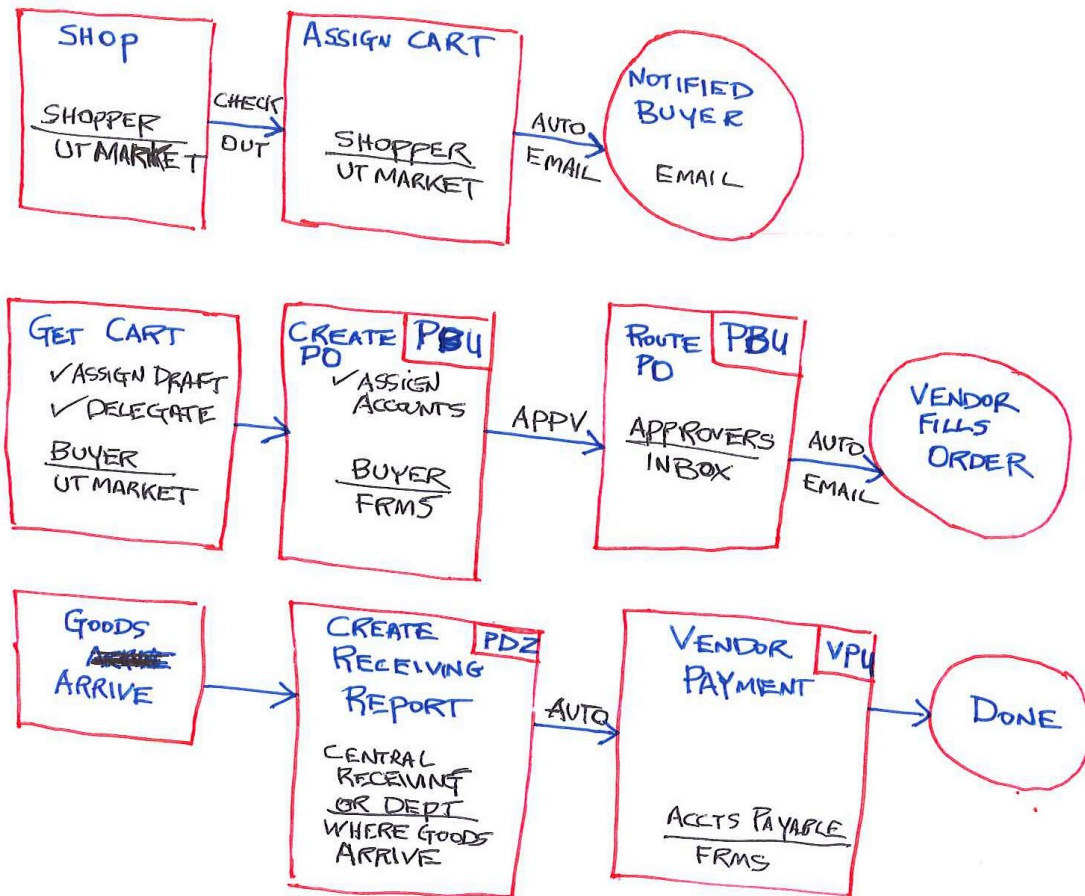
- **UT Market PO Details** – **PO Number [input] >> View PO**

### Receiving

- **Search Receipts** – **PO Number [input] >> View Receipt**
- **Receipt Details** – **Receipt ID [input] >> View Receipt**
- **Create UT Market Receipt** – **PO Number [input] >> Create**

Process for purchasing goods in UT Market.

Shoppers start in UT Market to pick the items for purchase. This becomes a shopping cart that the person then assigns to the department's buyer who then completes the process by creating the purchase order (becomes PBU doc in FRMS). This PBU document then routes for approval. The vendor then gets the final order and fills the purchase order. Next the goods arrive to the office (or central receiving). A receiving report document must be created once the items arrive to confirm the office has received the goods. Once that step is done, the FRMS system will automatically pay the vendor.



### How do I find a shopping cart assigned to me?

To search for a UT Market cart created by you or assigned to you, go to UT Market and click the carts tab and then the draft carts subtab. This page will show up to three sections:

- **My Drafts** displays the carts you have created and that are still assigned to you.
- **Drafts Assigned To Me** displays carts created by other users who assigned to you.
- **My Drafts Assigned to Others** lists carts you created and then assigned to someone else.

### Shopper Role: How can I reassign it to someone else?

A cart created by you and assigned to someone else can be recalled up until the time it has been checked out of UT Market. To recall a cart:

1. Click the **carts** tab in UT Market and then the **draft carts** subtab.
2. **My Drafts Assigned to Others section** displays carts created by you and assigned to others.
3. Click the **Recall** button (far right column) to recall the cart. It will then be assigned to you.

Once the cart is assigned to you, you can edit it, assign it to someone else, or delete it.

### Buyer Role: Ex: Out of Office: How to switch current buyer duties to another?

View Video: <http://www.utexas.edu/business/erp/frms/training.php>

1. Click the **carts** tab in UT Market and then the **draft carts** subtab.
2. Choose **Assign Substitute** button (top left)
3. Choose desired **User** from listing
4. Stays in effect until you (buyer) goes back in and chooses **End Substitution** button.

### How do I modify or cancel a UT Market Purchase Order?

To view a purchase order, type the purchase order number in the PO Number field and click View PO. Then, when viewing the purchase order, choose the Modify/Cancel button in upper right corner to create the correction document (PXU).

Two tips for changes:

- user must be a member of the desk on which the original to make changes
- Current status of the order needs to not already have been filled by vendor
- PO cannot have any receipts (in process) pending finalization.

### How do I cancel a purchase order (PO)?

To cancel a UT Market purchase order:

1. Click the **Procurement** tab in FRMS.
2. Click the **PO** tab.
3. Type the purchase order number in the PO Number field.
4. Click **View PO**.
5. Click **Cancel** to create a cancellation document.

### How do I record the receipt of items I ordered in UT Market?

Receipts for items delivered to Central Receiving (U-110) are entered by Central Receiving. Items shipped to other locations must be electronically received by the department in FRMS. To create a receipt:

1. Click the **Procurement** tab in FRMS.
2. Click the **Receiving** tab.

3. Click the **Create UT Market Receipt** tab.
4. Type the PO number in the **PO Number** box.
5. Click **Create Receipt for PO**.

### **How do I return an item purchased through UT Market?**

Follow the steps below to return an item purchased through UT Market:

1. Gather vendor contact information from the purchase order.
  - Go to FRMS, click the **Procurement** tab, and then click the **PO** tab.
  - Type the PO number in the **PO Number** field and click **View PO**.
  - Retrieve contact information from the Supplier Information section of the purchase order.
2. Notify the vendor of the item being returned, obtain a return authorization from the vendor, and return the item.
3. If the receipt has not been finalized (usually within 3 days after entry):
  - Adjust any departmentally-entered receipts in FRMS or contact Central to adjust a Central Receiving receipt.
  - After the corrected receipt has been finalized, process a change order to reflect the quantity being kept.

If the receipt has finalized (usually 3 days after entry): Request a credit from the vendor for the returned item (if allowed), because a change order cannot be processed to reduce the quantity.

### **How do we process the payment to the supplier?**

Departments are not responsible for processing payments to suppliers; payments for all UT Market orders are processed centrally by Accounts Payable, regardless of whether they are delivered to the department or to Central Receiving. Entry of a departmental receiving report in FRMS is the last action required by the department for orders that are delivered directly to the department.

### **PIN number for Office Max website?**

[https://austin-utexas.custhelp.com/app/answers/detail/a\\_id/1160/](https://austin-utexas.custhelp.com/app/answers/detail/a_id/1160/)



Exmample:

Cart Number: **25125416, 24774664**

**Purchase Order(PBU):** X0PBU987800

**PO Nbr:** 2012U03875 (needed for receipt step)

**Receiving Report (PD1):** X0PD1975082

**Vendor Payment(VPU):** X0VPU985572

Cart Number Email: **A UT Market cart has been assigned to you**

**Cart Name: 2011-10-10 eid-name 01**

## UT MARKET TIPS AND TRICKS

- Shopper Role:  
Profile >>User Settings/Purchasing/Cart Assignees
- Searching for goods (multi vendors, hosted only, not punchout):  
Shop: \_\_Search button
- When finishing a cart, can specify preferred accounts in the “Pay-from” comments box (middle of page) or “Add notes” (right side)
- Favorite: Items, (page 11)
- Multiple suppliers per car (pg. 12)(ask if really useful in practice)
- Shopper: Final Review >> Attach document can be useful
- Shopper: Final Review >>History (changes to cart)

Buyer Role:

- Get Cart from Draft Carts tab, assign a DTN number, pick correct desk, purchasing center, desk/view combo.
- Add accounts to document .. page 21

Suppliers Listing:

<http://www.utexas.edu/business/erp/frms/help/utmarket/suppliers.php>



# TEXAS Liberal Arts

The University of Texas at Austin  
College of Liberal Arts

## Liberal Arts - Training Presentation - Fall 2011

\*DEFINE                      TRANSACTIONS BY ENCUMBRANCE NUMBER - GT3                      Year 11 12  
Command: GT3              Account:                      Misc: 2012U03875                      Month: NOV

Transaction Status: C

Rec-Date	Voucher	Description	Obj	AC/RT	Amount	S
Document-ID	DTN	P.O.Number	Chk.Nbr	T-Code	Prc-Date	Account
_ 10/10/11	O848179	Hi-Ed Inc		0200 EN EN	1,591.03-	C
X0PBU987800		2012U03875		0200 10/10/11	14-1686-2050	
_ 10/20/11	L014637	HI-ED INC		0200 EN EN	24.01	C
X0VPU985709		2012U03875		0200 10/20/11	14-1686-2050	
_ 10/20/11	L014637	HI-ED INC		1846 EX DI	24.01-	C
X0VPU985709		2012U03875	F654395	0800 10/20/11	14-1686-2050	
_ 10/25/11	L016997	HI-ED INC		0200 EN EN	1,567.02	C
X0VPU985572		2012U03875		0200 10/25/11	14-1686-2050	
_ 10/25/11	L016997	HI-ED INC		1847 EX DI	783.51-	C
X0VPU985572		2012U03875	F653777	0800 10/25/11	14-1686-2050	
_ 10/25/11	L016997	HI-ED INC		1847 EX DI	783.51-	C
X0VPU985572		2012U03875	F653777	0800 10/25/11	14-1686-2050	