

eBuy Quick Guide to Using PO Correction and SAA Escalation Feature (March 2021)

How to Use the “PO Correction” Feature

When action is required by a Department Transactor and/or Receiver to enable payment of an outstanding invoice, the Accounts Payable staff will initiate a PO Correction communication via eBuy. This action will result in an email to all eBuy Transactors in the Accountability Structure associated with the PO and an item will display in the Transactor eBuy Menu labeled “PO Correction”. A number will display indicating the number of issues outstanding for the user.

Transactor Options

[Create Order](#)

[View Requests \(2\)](#)

[Search Orders](#)

[Create Emergency PO
\(2 available\)](#)

[eCatalog Shopping](#)

[PO Correction \(1\)](#)

When the Transactor clicks on the PO Correction, a grid will display of the open outstanding issues.

eBuy - Purchase Order & Requisition System

PO Correction Invoices


Please click on the invoice link for additional information

Accounting Operator		Vendor	Invoice	PO #	Invoice Dt	Invoice Total	Accountability Structure	Transactor Correction History		
Name	Date E-mail Sent							Transactor Name	Transactor Last Comment Date	Transactor Last Comment
Bobbi McCracken	03/21/2021 08:51 PM	ABC	6043208258	11081510	02/22/2021 12:00 AM	\$27,338.74	D01004			

When the invoice link is clicked, the following screen will appear with information on the Accounting User that sent the request. The Transactor can 1) click on the Invoice Number to view an image to the invoice, 2) click on the “View” link to see additional information on the correction request, 3) add a comment, 4) upload an attachment, and 5) click on “Close” to exit from the page. **Transactors are asked to evaluate the situation communicated and immediately take the required action to resolve the situation.** If the situation cannot be immediately resolved, the Transactor is asked to enter a comment explaining the reason for the delay using the “Add” link next to Comment History. Note: Please remember it is the Transactor’s responsibility to ensure the DAPO/PO is generated and finalized in advance of receiving goods and/or services being performed and a copy of the DAPO/PO must be provide to the vendor at the time of the order.

PO Correction Invoices

PO Correction Invoices

Invoice Number: 6043208258  1

Invoice Date: 02/22/2021

Vendor Name: ABC

PO Number: 11061510

Invoice Total: \$27,338.74

[Close](#) 5

Correction Requested From			Accounting Contact		Action	User	Date E-mail Sent	Email Selection	View
Name	E-mail	Phone	Name	Phone					
Bobbi McCracken	BOBBIB@ucr.edu	(951) 827-3303	Bobbi McCracken	(951) 827-3303	Sent Correction Email to eBuy Transactors	Bobbi McCracken	03/21/2021 08:51 PM	Insuff	View 2

Comment History [Add](#) 3

Uploaded Documents [Add](#) 4

Once the invoice is processed for payment or cancelled as appropriate, the item will automatically be removed from the grid.

SAA Escalations

When action is required by a Department Transactor and/or Receiver to enable payment of an outstanding invoice, the Accounts Payable staff will initiate a PO Correction communication via eBuy. When there is no response or action taken within a reasonable timeframe, a communication will be initiated to the Department SAAs associated with the Accountability Structure referenced on PO. The Department SAAs will receive an email and an item will display in the eBuy Menu under SAA Options under "Escalations". A number will display indicating the number of issues that have been forwarded to the SAA for resolution.

SAA Options

Escalation (3)

When the SAA clicks on the Escalation item, a grid will display of the open outstanding issues by Accountability Structure.

eBuy - Purchase Order & Requisition System

Escalated Invoices

Please click on the invoice link for additional information

Accounting Operator		Vendor	Invoice	PO #	Invoice Dt	Invoice Total	Accountability Structure	SAA Escalation History		
Name	Date E-mail Sent							SAA Name	SAA Last Comment Date	SAA Last Comment
Bobbi McCracken	03/22/2021 02:48 PM	ABC	6043208258	11061510	02/22/2021 12:00 AM	\$27,338.74	D01004			
Bobbi McCracken	03/25/2020 10:03 PM	DEF	4003935	10661914	09/30/2015 12:00 AM	\$71.11	D01054	JIM	04/17/2020 10:13 AM	Revised Invoice pending
Bobbi McCracken	04/17/2020 10:07 AM	GHI	9755864	10603745	01/09/2015 12:00 AM	\$3,393.63	ORG21	BOB	09/30/2020 12:06 PM	test


Done

When the invoice link is clicked, the following screen will appear with information on the Accounting User that sent the request. The SAA can 1) click on the Invoice Number to view an image to the invoice,

2) Add Comments to the History, 3) Upload documents, 4) click on the PO Correction Section to “View” the link to see additional information on the correction request, 5) View previous comments added by the Transactor, 6) See documents uploaded by the Transactor, 7) See approvals for invoices over \$10K as applicable, and 8) click on “Close” to exit from the page. SAAs are asked to evaluate the situation and communicated with the Transactor regarding the action required to resolve the situation. If the situation cannot be immediately resolved, the SAA is asked to enter a comment explaining the reason for the delay using the “Add” link next to Comment History. If necessary, the SAA should establish another eBuy Transactor to take action of the request. Note: It is the SAA’s responsibility to ensure that all eBuy Transactors receive the appropriate training to perform their job including the following on-line courses in the LMS: Purchasing: Obtaining Goods and Services at UCR, Purchasing: Transactor A Training, Purchasing: Transactor B Training, and Purchasing: Transactor C Training. In addition, there is a link to eBuy coding standards within the Transactor purchase order page. Transactors are responsible for generating and finalizing a DAPO/PO in advance of receiving goods and/or services being performed and providing the vendor with a copy of the DAPO at the time of the order.

Invoice Escalation

Escalation

Invoice Number: 6043208258  1 PO Number: 11061510
 Invoice Date: 02/22/2021 Invoice Total: \$27,338.74
 Vendor Name: ABC Accountability Structure: D01004-Electrical & Computer Eng 8 [Close](#)

Escalation Requested From			Accounting Contact		Action	User	Date E-mail Sent
Name	E-mail	Phone	Name	Phone			
BOBBIB	BOBBIB@ucr.edu	(951) 827-3303	Bobbi McCracken	(951) 827-3303	Sent Escalation Email to SAA	Bobbi McCracken	03/22/2021 02:48 PM


ABC

Comment History [Add](#) 2

Role	Comments	User Name	Date
Accounting	Testing notification to SAA	Bobbi McCracken	03/22/2021 02:48 PM

Uploaded Documents [Add](#) 3

PO Correction Invoices

Invoice Number: 6043208258  PO Number: 11061510
 Invoice Date: 02/22/2021 Invoice Total: \$27,338.74
 Vendor Name: ABC


Correction Requested From			Accounting Contact		Action	User	Date E-mail Sent	Email Selection	View
Name	E-mail	Phone	Name	Phone					
Bobbi McCracken	BOBBIB@ucr.edu	(951) 827-3303	Bobbi McCracken	(951) 827-3303	Sent Correction Email to eBuy Transactors	Bobbi McCracken	03/21/2021 08:51 PM	Insuff	View 4

Comment History 5

Role	Comments	User Name	Date
Transactor	Vendor will be sending a revised invoice for the correct amount.	JIM	03/22/2021 02:46 PM

Uploaded Documents 6

Invoice Approvals

Invoice Number: 6043208258  7 PO Number: 11061510
 Invoice Date: 02/22/2021 Invoice Total: \$27,338.74
 Vendor Name: ABC

Approval Requested From			Accounting Contact		Action	User	Date E-mail Sent
Name	E-mail	Phone	Name	Phone			

Once the invoice is processed for payment or cancelled as appropriate, the item will automatically be removed from the grid.