Agenda

- Timeline
- Transition Plan process
- Future ordering with Airgas
Timeline

May 7, 2018

- Any orders placed May 1st and going forward will no longer generate a monthly cylinder rental invoice
- Cylinder processing fee(s) will be applied at time of purchase as a one-time fee
- Each gas has its own fee structure. A cylinder processing fee will be applied per gas, not per order
- Punchout orders will automatically populate the fee(s) and bring it into the TechMart Shopping Cart
- Requisitioners will have to mark the fee as non-taxable in the Shopping Cart
- Non-Catalog orders will require an SOS/PPS Buyer to manually add the non-taxable fee lines to the order
- Payment of existing monthly cylinder rental invoices will be processed in TechMart

GOAL: By the end of 2018, there will be no remaining monthly cylinder rental invoices!
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

- Airgas will email monthly cylinder rental invoices to accountspayable@caltech.edu
- Our 3rd party Digital Mailroom Room (DMR) will scan them and get them into TechMart
- It will go to AP in a unique folder identified as:

DMR Invoice Notifications - No Invoice Owner - Airgas [2 results]
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

- A designated AP clerk will review the scanned image of the invoice, identify who the “Invoice Owner” is, and then populate the “Invoice Owner” name into the field in TechMart
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

- The invoice will route to the designated “Invoice Owner” for a PTA and approval
- It will come to you in your “My Invoice Approvals” folder in TechMart
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

• Once you see it in your folder, you will click on the Invoice No. (it will always start with a “V”)

![Invoice Approval Table]

- Invoice No.: V2633
- Supplier Invoice No.: 9950512857
- Supplier Name: AIRGAS WEST INC dba AIRGAS GASPRO
- Assigned Approver: Genelle Vinci
- Invoice date: 3/20/2018 11:17 AM
- Match Status: Unmatched
- Amount: 6.82 USD
- Action: Approve
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

- You will verify the invoice is yours
- You can view the pdf image by clicking into it at the top
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

- If the invoice is yours, enter the corresponding PTA information
- **NOTE: EXPENDITURE TYPE SHOULD BE FEES**
- **NOTE: RENTAL CHARGES NEED TO BE INDICATED AS NON-TAXABLE**
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

• To mark this as non-taxable, click on the “edit” button at the line level

• Uncheck the “taxable” box and click “save”
Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

Once completed, select "Approve/Complete & Show Next"
What if the invoice isn’t mine?

• If upon reviewing the invoice, you conclude this is not your invoice:
  • Do not enter a PTA
  • Under “Available Actions” at the top right, select “Forward” and hit “Go”
  • Forward to Lilianne Mendez
    • Lilianne (Lilly) is the designated AP processor for all Airgas rental invoices
    • Type in a note to Lilly “This is not my rental invoice” and select “Forward”
Airgas Punchout

- When you come back into TechMart, your shopping cart will have the respective fees added in additional lines.