

Caltech

Airgas[®]

an Air Liquide company

Caltech

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

The image shows a scanned invoice from Airgas and a screenshot of the TechMart system interface. The invoice is for a cylinder rental, dated 12/31/2017, with a due date of 01/30/2018 and a total amount of \$6.82. The supplier is AIRGAS WEST INC dba AIRGAS GASPRO. The bill-to address is at the California Institute of Technology in Pasadena, CA. The TechMart interface on the right shows the invoice details being entered into a form, with orange arrows pointing from the invoice fields to the corresponding form fields.

Invoice Details:

18075904060040

Airgas
an Air Liquide company
AIRGAS USA, LLC
PO Box 93500
Long Beach, CA 90809-3500

CYLINDER RENTAL INVOICE

INVOICE DATE	PAYER	INVOICE NO.	DUE DATE	PAY THIS AMOUNT
12/31/2017	1683422	9950512857	01/30/2018	\$ 6.82

Manage Your Account Online
Pay invoices, review order history, track shipping, and more!
Go to: airgas.com/onlinebillpay
We accept

PLEASE MAKE CHECKS PAYABLE AND REMIT TO:

SOLD BY: AIRGAS USA, LLC
2250 BUENA VISTA ST
DUARTE CA 91010-3318
626-358-0101

BILL TO: ATTN PAYMENT SERVICE 103 6
CALIFORNIA INSTITUTE OF TECHNOLOGY
1200 E CALIFORNIA BLVD
PASADENA CA 91125-0002

Airgas USA, LLC
PO BOX 7423
PASADENA CA 91109-7423

16834221995051285700000006821

TO ENSURE PROPER CREDIT, PLEASE RETURN THE UPPER PORTION WITH YOUR REMITTANCE. FOR QUESTIONS ON YOUR ACCOUNT PLEASE CALL: 800-224-7427

TechMart Form Fields:

- Invoice Number: V2633
- Invoice Date: 12/31/2017 (mm/dd/yyyy)
- Due Date: 1/30/2018 (Override due date)
- Invoice Owner: Select a different user...
- Supplier Name: AIRGAS WEST INC dba AIRGAS GASPRO (more info...)
- Supplier Account No.:
- Supplier Invoice No.: 9950512857
- Remit To: Remit To Location List (REMIT-PASADEN1)
- Remit To Location List: Airgas USA LLC, PO Box 7423, Pasadena, CA 91109-7423
- United States, Address Id 5107562
- Shipping address: no address

Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

The screenshot shows a web browser window displaying an Airgas invoice. The invoice number is 18075904060040. The invoice is for a cylinder rental, dated 12/31/2017, with a due date of 1/30/2018. The amount due is \$6.82. The invoice is payable to Airgas USA, LLC. The sidebar on the right contains the following details:

Invoice Number	V2633
Invoice Date	12/31/2017 mm/dd/yyyy
Due Date	1/30/2018 <input type="checkbox"/> Override due date
Invoice Owner	Genelle Vinci Select a different user...
Supplier Name	AIRGAS WEST INC dba AIRGAS GASPRO more info...
Supplier Account No.	
Supplier Invoice No.	9950512857
Remit To	
Remit To Location List	REMIT-PASADEN1 Airgas USA LLC PO Box 7423 Pasadena, CA 91109-7423 United States Address Id 5107562

The invoice details include:

Airgas AIRGAS USA, LLC
an Air Liquide company PO Box 93500
Long Beach, CA 90809-3500

CYLINDER RENTAL INVOICE

INVOICE DATE	PAYER	INVOICE NO.	DUE DATE	PAY THIS AMOUNT
12/31/2017	1683422	9950512857	01/30/2018	\$ 6.82

Manage Your Account Online
Pay invoices, review order history, track shipping, and more!
Go to: airgas.com/onlinebillpay

We accept

PLEASE MAKE CHECKS PAYABLE AND REMIT TO:

ATTN: PAYMENT SERVICE 103 6
CALIFORNIA INSTITUTE OF TECHNOLOGY
1200 E CALIFORNIA BLVD
PASADENA CA 91125-0002

Airgas USA, LLC
PO BOX 7423
PASADENA CA 91109-7423

16834221995051285700000006821

TO ENSURE PROPER CREDIT, PLEASE RETURN THE UPPER PORTION WITH YOUR REMITTANCE. FOR QUESTIONS ON YOUR ACCOUNT PLEASE CALL 1-800-944-7427

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

My Invoice Approvals [42 results] Page 1 of 3								
Invoice No.	Supplier Invoice No.	Supplier Name	Assigned Approver	Invoice date	PO No.	Match Status	Amount	Action
 V2633	9950512857	AIRGAS WEST INC dba AIRGAS GASPRO	Genelle Vinci	3/20/2018 11:17 AM		Unmatched	6.82 USD	Approve
Due Date	1/30/2018			No. of Lines: 1				
Invoice Name	2018-03-20 California Institute of Technology 01			 Folders 0 Days in folder [My Invoice Approvals]				
Type	Non-PO Invoice							
Invoice Source:	Digital Mailroom Import							

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”)

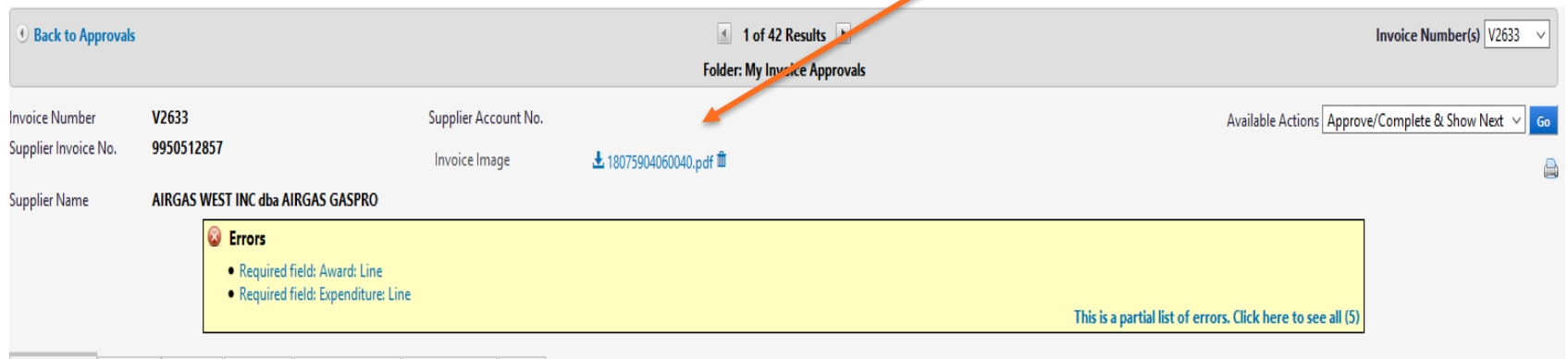


My Invoice Approvals [42 results] Page 1 of 3

Invoice No.	Supplier Invoice No.	Supplier Name	Assigned Approver	Invoice date	PO No.	Match Status	Amount	Action	<input type="checkbox"/>
 V2633	9950512857	AIRGAS WEST INC dba AIRGAS GASPRO	Genelle Vinci	3/20/2018 11:17 AM		Unmatched	6.82 USD	Approve	<input type="checkbox"/>
Due Date	1/30/2018			No. of Lines:	1				
Invoice Name	2018-03-20 California Institute of Technology 01			 Folders	0 Days in folder [My Invoice Approvals]				
Type	Non-PO Invoice								
Invoice Source:	Digital Mailroom Import								

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



The screenshot displays the TechMart interface for invoice approvals. At the top, there is a navigation bar with a "Back to Approvals" link, a "1 of 42 Results" indicator, and an "Invoice Number(s)" dropdown menu set to "V2633". Below this, the folder name "Folder: My Invoice Approvals" is shown. The main content area contains the following details:

Invoice Number	V2633	Supplier Account No.		Available Actions	Approve/Complete & Show Next	Go
Supplier Invoice No.	9950512857	Invoice Image	18075904060040.pdf			
Supplier Name	AIRGAS WEST INC dba AIRGAS GASPRO					

An orange arrow points to the "Invoice Image" link. Below the details, a yellow error box is visible:

Errors

- Required field: Award: Line
- Required field: Expenditure: Line

[This is a partial list of errors. Click here to see all \(5\)](#)

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**

Buyer Invoice | Approvals | Matching | Comments | Supplier Messages | Attachments (1) | History

Summary | General | Discount, Tax, Shipping & Handling | Codes

⚠ The voucher contains one or more non-PO voucher lines. They are excluded from the matching.

Hide header | Hide value descriptions


General		Addresses	Note/Attachments
Invoice Type	Invoice	Remit To	External Note
Pay Status	In Process	Airgas USA LLC	Internal Note
Invoice Number	V2633	PO Box 7423	
Supplier Invoice No.	9950512857	Pasadena, CA 91109-7423	
Supplier Name	AIRGAS WEST INC dba AIRGAS GASPRO	United States	External Attachments
Invoice Date	12/31/2017	Address Id 5107562	Internal Attachments
Discount Date	no value	Ship To	
Due Date	1/30/2018	no address	
Terms	0, Net 30		
Terms Discount	0.00 USD		
Invoice Name	2018-03-20 California Institute of Technology 01		
Invoice Owner	Genelle Vinci		
Match Status	Unmatched		
Invoice Source	Digital Mailroom Import		
Contains substituted item(s)	x		
Receiving Tolerance	no value		
Subcontract Final Invoice	x		
AiM Work Order	no value		
Bring into Oracle on hold?	x		

Payment Information		Discount, Tax, Shipping & Handling	
Accounting Date	3/20/2018	Discount, tax, shipping & handling	
F.O.B.	Destination	Allocation	Weighted
Payment Method	Unknown		Header-level
Payment No.	no value	Discount	0.00 USD
Payment Date	no value	Sales Tax	0.00 USD
		Shipping	0.00 USD
		Handling	0.00 USD
		Total	6.82 USD
		Miscellaneous Fees	0.00 USD

View/edit by line item...

Codes

LINE	Project	Task	Award	Expenditure	Organization
no value	Required field	Required field	Required field	Required field	Required field



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

Codes					
LINE	Project	Task	Award	Expenditure	Organization
	FIN.00006	1.1	GB.00007	Consulting Fees	Caltech
	PURCHASING&PAYMENT SERVICES	1.1	AVP/CONTROLLER	Consulting Fees	Caltech

Line Item Details View/edit by line item...

Hide line details For selected line items:

<No PO Number>

PO Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	<input type="checkbox"/>
1	RENT CYL SPEC LARGE OTHER more info...	RRCYLSLGOTH		0.22 USD	31	6.82 USD	<input type="checkbox"/> <input type="button" value="edit"/>

- Uncheck the “taxable” box and click “save”

Edit Line ? X

PO Line	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	RENT CYL SPEC LARGE OTHER more info...	RRCYLSLGOTH		<input type="text" value="0.22"/> <small>select contract...</small>	<input type="text" value="31"/>	6.82 USD

PO Number no value

PO Department Purchasing Services (Purchasing Services)

Substitute Item

Taxable

External Note

1000 characters remaining [expand](#) [clear](#)

Transition Process: How to pay Monthly Rental Cylinder invoices in TechMart

Once completed, select "Approve/Complete & Show Next"

Requisition Number(s) 2195053 ▾

Available Actions: Approve/Complete & Show Next ▾

Go

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”

Available Actions

- Forward...
- Approve/Complete Step
- Return Invoice
- Assign to myself
- Forward...**
- Reject/Cancel
- Mark as Dispute
- Add Comment
- Copy to new voucher
- Create Recurring Invoice
- Add Notes to History

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page

Search

Forward...

You are forwarding on behalf of: Guillermo Ramirez

To: Lilianne Mendez

1000 characters remaining

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

Forward

Close

Airgas Punchout

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

Shopping Cart [Continue Shopping](#)

Name this cart:
Share my cart with others



2 Item(s) for a total of **38.33** USD
subtotal: 35.00 USD
estimated tax, shipping & handling: 3.33 USD

[Proceed to Checkout](#)

Have you made changes? [Update](#)

[Help](#) [Empty Cart](#) [Create New Cart](#) Perform an action on (0 items selected)... [Select All](#)

Airgas **AIRGAS WEST INC dba AIRGAS GASPRO** [more info...](#)
PO-PASADENA [Edit](#)
PO Box 7423, Pasadena, CA 91109 US

Product Description	Unit Price	Quantity	Total
 gas open form... Part Number GAS Taxable <input checked="" type="checkbox"/>	25.00 USD EA Update More Actions	1 Sales Tax Shipping Handling	25.00 USD 0.00 USD 0.00 USD
 Rental charge open form... Part Number RENTAL FEE Taxable <input type="checkbox"/>	10.00 USD EA Update More Actions	1 Sales Tax Shipping Handling	10.00 USD 0.95 USD 0.00 USD 0.00 USD
Supplier subtotal			38.33 USD

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