Why am I receiving notifications in TechMart?

You are part of the TechMart Requisition workflow for that designated Voucher.

1) You could be the Requisitioner who receives a notification indicating that your Requisition got approved or rejected, or
2) you can be an approver who receives a notification alerting you to approve a Requisition.

You are part of the TechMart Invoice workflow for that designated Voucher.

1) You could be the Invoice Financial Approver who is needing to financially approve the Voucher, or
2) you can be the Invoice Financial Approver who is receiving the notification alerting you that a voucher < $1,000.00 has been submitted for a user you are an assigned approver for.

If your Division/Department requires receiving, you will receive a notification alerting you to complete a goods receipt against a PO. The goods receipt notification is sent daily for a maximum of 30 days, however, completing the goods receipt in a timely fashion will eliminate the excess notifications. For all Declining Balance PO’s (Consulting, Blanket & Service Agreement), a cost receipt is always required, regardless of what your Division/Department Receiving threshold is.

How do I turn on/off my notifications?

Click on your name in the top right grey bar

View My Profile

Notification Preferences

- Shopping, Carts & Requisitions
- Accounts Payable
- Form Requests

What notifications does Procurement recommend I have turned on?

<table>
<thead>
<tr>
<th>Requisitioner</th>
<th>Requisition Financial Approver</th>
<th>Shopper/Receiver</th>
<th>Form Requests</th>
<th>Invoice Financial Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition Workflow complete/PO created</td>
<td>Requisition pending Workflow approval</td>
<td>Requisition Workflow complete/PO created</td>
<td>Form Request Rejected in Workflow</td>
<td>Invoice Workflow Notification available</td>
</tr>
<tr>
<td>Requisition rejected</td>
<td></td>
<td>Requisition Rejected</td>
<td></td>
<td>Invoice pending Workflow approval</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invoice Requires Receipt notice</td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Receipt reminder notification</td>
<td></td>
<td>Invoice Returned</td>
</tr>
<tr>
<td>PO Workflow complete</td>
<td></td>
<td>PO Workflow Complete</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
• **3-WAY vs. 2-WAY RECEIVING (MATCHING):** 3-Way Match – PO, Invoice, and Receipt match. 2-Way Match – PO and Invoice match (Qty. and Price)

• **AFTER-THE-FACT (AFT):** Unauthorized Supplier transactions made on behalf of Caltech that run counter to Caltech purchasing policies and procedures, and are monitored for training and reporting purposes. All After-the-Fact purchases, regardless of dollar value, require justification and financial approval

• **COST RECEIPT:** Used with Declining Balance PO’s for releasing a desired amount of the value of the PO

• **DECLINING BALANCE PO:** Used for the purchase of goods or services over a fixed period of time, with a set dollar amount and PTA

• **DEFAULT APPROVER:** The individual to whom a Requisition or Invoice automatically routes for additional approval

• **GOODS RECEIPT:** Used with Spot Buy and catalog orders to confirm receipt of goods of by indicating actual amount of quantity received

• **INVOICE:** The Supplier document sent to accountspayable@caltech.edu or mailed to PO Box 3237, Scranton, PA 18505, to request payment for goods and/or services provided by the Supplier

• **INVOICE OWNER:** Invoices associated with a Requisition inherit the Requisitioner as the Invoice Owner. Receiving thresholds and Financial approval is based off the Invoice Owner.

• **PAYMENT REQUEST:** Form used to request payment for purchases identified on the Payment Request Usages List

• **RECEIPT:** Electronic document created by the Invoice Owner (Requisitioner), to confirm items received or services performed as agreed

• **REQUISITION:** Official request to make a purchase; once approved, is converted to a Purchase Order

• **REQUISITIONER:** An individual who has been given authority by their Division/Department to submit electronic requests for items or services

• **WIRE TRANSFER:** Method of transferring funds electronically; generally for foreign payees only – exceptions are allowed for Finance & Treasury for same day payments to domestic suppliers

• **VOUCHER:** Internal to Caltech, it is a unique number assigned by TechMart to each Supplier Invoice. Voucher numbers begin with a “V”

### Payment Request Usages List

- Artist Fees and Performers
- Apparel & Personalized Safety Gear
- Athletic Officials
- Bank Loan, Interest and Bond Payments (Finance Only)
- Caltech Clubs/Affiliation Support
- Catering Services
- Child Care (limited Policy)
- Contributions/Donations
- Financial Assistance for Students, Visitors, External Affiliates
- Food & Refreshments, Break Room Supplies
- Freight and Shipping
- Gifts
- Ground Transportation
- Honoraria
- Human Subjects
- Instruction Fees (for CTME)
- Insurance Premiums and Benefits (HR/Payroll Only)
- Legal Services
- Licenses and Permits
- Medical and Physician Services
- Meetings & Conferences
- Membership Dues
- Mileage Reimbursements
- Petty Cash
- Postage
- Prizes and Awards
- Recreational Activities/Entertainment
- Refunds
- Relocation and Moving Expenses
- Royalties
- Subscriptions (Magazines, Newspapers)
- Taxes
- Tuition (HR Only)
- Utilities
- Visiting Faculty Support