

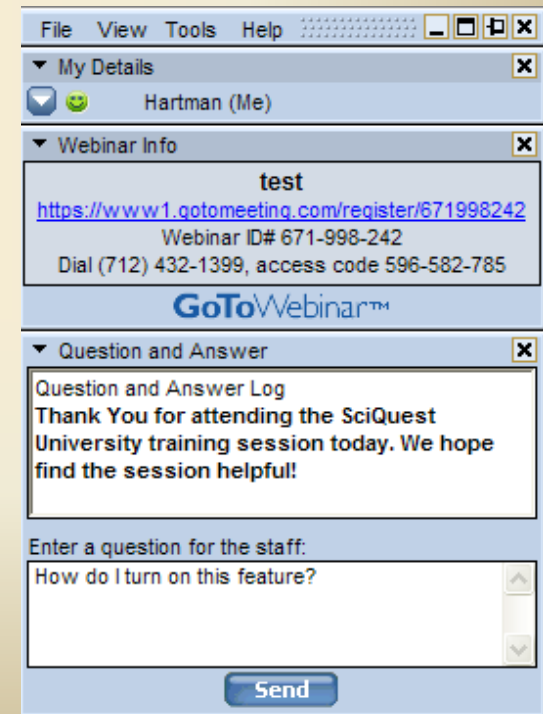


Credit and Payment Changes Webinar



Webinar Conduct

- If you have not dialed into the conference line yet, please do so at this time
 - Phone number: **SEE MEETING EMAIL NOTIFICATION**
 - Access code: **SEE MEETING EMAIL NOTIFICATION**
 - Your phone lines will be muted automatically as soon as you dial into the conference line.
- **To Ask Questions:**
 - Locate the Question and Answer box on your panel
 - Enter your question and click Send





Changes to PantherBuy

- Payment Process
 - What is changing?
 - What will I need to do?
- Credit Process
 - What is changing?
 - What do I need to do to get a credit?
 - Where do I find my credit information?
 - What do I do if I don't see my credit on an order?



Payments: What is changing?

Payment Process:

- We will be receiving electronic invoices for some of the suppliers in PantherBuy
- Buyers and Approvers may be asked to check an invoice received in the case of a discrepancy (NOID)
- We anticipate discrepancies will be limited to Quantity and Price



Payments: What is changing?

Payment Process:

- There will now be two prefixes for PantherBuy orders:
 - “PB” for non electronic invoicing suppliers (PB123456)
 - “E” for all electronic invoicing suppliers (E1234567)
- We are expecting very few discrepancies on electronic invoices
- Other institutions have reported discrepancies with only 1% of their total orders
- If there is a discrepancy on an invoice, Payment Processing will contact the appropriate person(s) to have the discrepancy corrected



Payments: What will I need to do?

Payment Process:

- In case of a discrepancy, Payment Processing will add a Comment to the invoice in the PantherBuy system
- The end user will receive an email informing that there is a discrepancy with the invoice
- There will be a link in the email that will direct you to the Invoice Comment in the PantherBuy system. (If you are not already logged into the system, you will be prompted to log in first)
- Once the invoice is reviewed, please click on Reply To within the Comments tab of the invoice. This will notify Payment Processing of your response



Payment Discrepancy Demo



Credits: What is changing?

Credit Process:

- PantherBuy Department Buyers will no longer need to go into PantherBuy and create their own credits
- If a credit is due, end users must contact the supplier, work out the return details and request that a credit memo be sent to Payment Processing
- The credits will either be electronically received from the suppliers, or they will send a paper credit memo

PantherBuy Credits: Where do I find my credit?

Credit Process:

- Credits for all PantherBuy orders will be entered into the PantherBuy system
- You will be able to find credit information by searching the order history for the Purchase Order to which the credit was applied
- The credit information will also appear on the PRISM level reports
- If you do not see your credit applied to the order, please contact Payment Processing or The PantherBuy Team



Wrap Up

Wrap Up:

- The University of Pittsburgh will begin the new payment and credit processes starting on **Monday, September 14, 2009**
- The PantherBuy Team will post online training modules detailing the processes that were covered in the webinar today
- Please look for them at www.pantherbuy.pitt.edu under the “Online Training” link
- These sessions will be posted by Wednesday, September 16



Questions

Questions:

At this time we welcome any and all questions that you may have for our team.

You can also email us at pantherbuy@bc.pitt.edu if you would prefer.