Tips & Tricks

E-commerce from the UCSD Purchasing website

- Be sure to check the vendor's policies affirming that an order can be cancelled, returned, or refunded. It is recommended to place an order that will not expire before you are able to use it. Just keep in mind that many textbooks are non-returnable.
- Check the vendor's returns form to understand any limitations on where the book can be returned
- If the book is being returned, please be sure to include all the packaging.

Travel Expense Reporting

- To ensure your records are accurate, please complete all Expense Reports.
- If you have any questions or concerns, please contact the Budget & Finance helpdesk @ itsbilling@ucsd.edu.

SFF Financial Reporting Updates

In Oracle Financials, a new feature called Commitment from Marketplace Purchase Orders is now available. This feature allows you to reconcile your vendor invoices to your POs to ensure that your POs are accurate and up-to-date.

- You can view this feature in the Oracle Financials dashboard by navigating to the following path: Home > Budget and Finance > Oracle Financials > Commitments > Commitment from Marketplace Purchase Orders.

- To use this feature, you will need to select a PO and enter the invoice information. Once the invoice is reconciled, the PO will be marked as reconciled.

- Please contact the Budget & Finance routed helpdesk @ itsbilling@ucsd.edu if you have any questions or concerns.

Announcements

- Important financial updates and guidance will be shared through the Budget & Finance Weekly Digest.
- To receive future updates, please subscribe to our mailing list.

- Oracle Procurement as well as feedback to gain valuable, practical experience.

- Understanding of buying on campus. Instruction will involve an introduction to Oracle Procurement, as well as feedback to gain valuable, practical experience.

- Continue to report all enhancements, new reports, issues, and office hours availability. Don't miss it!

- The January Ledger is Officially Closed! IT Services will continue to engage Oracle on their root cause analysis for slow reports. Thank you to all the users who provided recordings and details - it was very helpful to this escalation. We will keep you informed as we receive more information.

- We are actively working with Oracle on our performance issues causing slow reports. Thank you to all the users who provided recordings and details - it was very helpful to this escalation. We will keep you informed as we receive more information.

- Oracle BI & Financial Reporting: Exceptions Panorama
- The course is designed to provide an overview of the new Concur dashboard is designed to highlight the transaction discrepancies and errors in financial reporting and reconciliation. Participants will be able to leverage this information to improve their financial reporting process and reduce potential discrepancies.

- The course will be held on March 4th at 9:00am - 11:00am. The course is recurring on a monthly basis.

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