Supply Chain Management

Transcepta E-Invoicing

Webinar Learning Series
April 2022
Agenda

- What is Transcepta?
- Overview of Transcepta e-invoicing
- Resources
- How to get help
- Q & A
  - Please type your questions into the Zoom Q&A as we go

Note: This webinar will be recorded and posted on the Supply Chain Management website.
What is Transcepta?

• Transcepta is UCSF’s e-invoicing solution
• Suppliers submit invoices and credits to Transcepta
• Transcepta sends invoices electronically to BearBuy
• There is no cost for suppliers to use Transcepta
Transcepta Benefits

- Faster processing of invoices
- Reduced costs for suppliers sending invoices
- Supports University green initiatives by eliminating paper invoices
  - UCSF saved 1,200+ trees with Transcepta electronic invoicing to date
Transpecta Requirements

• Suppliers that receive BearBuy purchase orders (POs) are required to submit invoices through Transpecta.

• This information is shared with suppliers at the bottom of BearBuy POs sent to suppliers.

PO Terms and Invoicing Instructions

Invoicing Instructions: Invoices for UCSF campus purchase orders must be submitted directly to our e-invoicing partner, Transpecta. There is no cost to use Transpecta. Visit http://connect.transpecta.com/ucsf to register and submit invoices. For payment questions, submit your question to https://ucsf.service-now.com/esc/scm-supplier for assistance.
Transcepta Exclusions

Purchase Order Invoices

- Facility Rental invoices/supplemental forms
- Invoices from other universities
- Suppliers billing in foreign currency
- Foreign suppliers who do not understand how to submit invoices through Transcepta
- Suppliers that have accessibility needs and cannot submit invoices through Transcepta
- Catalog/punch-out suppliers sending invoices directly into BearBuy
- Cell phone bills
Transcepta Exclusions

Non-Purchase Order Invoices

- Check request forms (ex. research subjects)
- Relocation travel expense vouchers
- Subcontract invoices
- BearBuy Payment Request Forms including:
  - Utilities (Ex: landline phone bills)
  - Postage/small-package courier
  - Journal publications
- BearBuy After the Fact Forms
- BearBuy Meeting & Entertainment Payment Request Forms
Transcepta & UCSF Invoicing Process

1. Supplier registers with Transcepta
2. UCSF issues purchase order
3. Supplier submits invoice to Transcepta
4. Supplier resolves issues/errors
5. UCSF reviews and approves
6. Supplier receives payment

UCSF Supply Chain Management
Transcepta Supplier Registration

• Suppliers need an account to submit invoices

• Suppliers register for an account at: http://connect.transcepta.com/ucsf

• If suppliers have previously registered with Transcepta with another client, they need to request Transcepta connects them to UCSF

• Some suppliers have been automatically registered with Transcepta

• 11,000+ UCSF suppliers registered to date
Invoice Submission

Suppliers can submit invoices through different methods

• Web Portal
  o Default submission method
  o Suppliers enter invoices into Transcepta website

• Email
  o Email invoices directly to Transcepta
  o Requires setup with Transcepta

• Virtual Printer
  o Uses standard document printing methods to send invoices

• Electronic Data Interchange (EDI)
  o Electronic communication method for exchanging data
  o Requires Transcepta and supplier IT coordination to setup submission channels

UCSF employees cannot submit invoices on behalf of suppliers
Post-Invoice Submission

- Invoices are validated to ensure there are no issues
- Invoices that pass validation are sent to BearBuy on average in one to two business days
- Suppliers can log into the Transcepta Supplier Portal to see invoices that were previously submitted
Common Transcepta Issues

• Issues with the invoice:
  o The supplier will be notified by Transcepta to correct issue
  o The invoice will not be sent to BearBuy

• Common issues include:
  o No/incorrect PO number
  o Mathematical errors

• Suppliers need to review and correct errors in Transcepta

• Suppliers can contact Transcepta for help
Common BearBuy Issues

• If an invoice is sent to Transcepta, but the invoiced amount exceeds the PO amount, the invoice will need extra review and approval
  o Ensure PO always has funds for future invoices

• If a BearBuy PO is closed, the Transcepta invoice will not be sent to BearBuy
  o Do not close POs if you expect additional invoices
  o Ensure that POs have sufficient funds
Supporting Use of Transcepta

- Inform suppliers that Transcepta is the electronic invoicing standard at UCSF for suppliers that receive BearBuy POs
- Ask suppliers to submit your invoices through Transcepta
- Do not email invoices to Supply Chain Management Accounts Payable on behalf of the supplier
- Purchase from suppliers that submit invoices through Transcepta
Suppliers Refusing to Use Transcepta

- Ask them to use Transcepta, the method UCSF invoices must be submitted
- Contact the Supply Chain Management Response Team for assistance
- If the supplier refuses, consider alternatives:
  - Use BearBuy catalog suppliers
  - Select another supplier and place orders using BearBuy forms
  - Obtain and use Procurement Card for low-risk/low-cost purchases
  - **Do not use** personal funds to make purchases
Support for Suppliers Using Transcepta

• If suppliers have issues submitting invoices, ask them to contact Transcepta support

• If they have questions for UCSF, they can contact the Supply Chain Management Response Team

• Campus departments are not responsible for supporting suppliers using Transcepta
How To Get Help

UCSF employees and suppliers can connect with the SCM Response Team using the buttons on the **Need Help?** section of SCM’s website: supplychain.ucsf.edu
How To Get Help - For Suppliers

• Suppliers can contact Transcepta Support
  o Email: support@transcepta.com
  o Phone number: (949) 382-2842
  o Transcepta support pages: https://help.transcepta.com/hc/en-us

• UCSF Employees
  o Encourage suppliers to contact Transcepta
  o Should not contact Transcepta support directly
Questions & Answers

Please type your questions in the Zoom Q&A

Note: If we cannot answer all questions during this webinar, we will email answers to all participants.