MarshMcLennan Agency

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iProcurement Frequently Asked Questions

Check out our Vendor Payables site for important links, updates, and iProcurement resources. If you have any questions, email MMA Vendor AP Team to reach a member of our team. We are always happy to assist you!

Spend Requests

I need to make a purchase. Where do I start?

Upon approval from your manager, complete the MMA Purchase Order Request Form. If your request is a one-time payment that does not need to be paid again that year select “One-time Payment”.

If the vendor will be invoicing MMA throughout the year, select “Blanket Purchase Order”.

What do I need to attach with my request?

One-time payment:

- Order Form or Quote (preferred)
- Invoice
- W-9 (sponsorships/donations)
- Compliance approval (if applicable)

Blanket Purchase Order:

- Spend Request Form
- Order Form or Quote (preferred)
- Invoice
- W-9 (sponsorships/donations)
- Compliance approval (if applicable)

What do I enter under in the spend category field? What if I am unsure of the correct category?

Check out the **Spend Category Guide** in Vendor Payables. You can filter and search for specific categories. You can also review detailed category descriptions to help you determine what category to choose. We recommend providing specific detail in the Vendor Product / Service Description field to help ensure your request is processed correctly.

If our team has any questions on the spend category, we will reach out to you for clarification.

What if I did not complete the MMA Purchase Order Request form prior to placing an order?

Complete MMA Purchase Order Request Form. Payment cannot be processed until this step is completed. To avoid payment delays this should be submitted as soon as possible.

Can other members of my team make purchases under a Blanket Purchase Order I requested?

Teams are encouraged to coordinate and submit their annual spends under a single Blanket Purchase Order. Any subsequent invoices under this request must reflect this Purchase Order number.

What if I don't have an invoice from the vendor?

Under this new proactive process you will likely not have an invoice when you submit a spend request.

Complete MMA Purchase Order Request Form and include a Quote or an Order Form from the vendor. If the vendor does not provide you with one of these forms, complete a Spend Request form located in the Vendor Payables site.

MMA Purchase Order Request Form

How long will it take to receive a Purchase Order number before I can purchase a good or service?

There are many variables that play into how long it takes for a purchase order to be created. This includes:

- Vendor setup or modification
- Requisition approval process
- Amount of spend request
- Spend Request is not complete (ex. Missing spend request form, vendor contact not provided, and incomplete fields on MMA Purchase Order Request Form)

We recommend completing your request in full and provide all needed items to process. This ensures our team has items required to move forward with your request. To check the status of your request, navigate to MMA Purchase Order Request Form and select link labelled "Click here to view your previous submissions & approved POs."

How will I be notified that my spend request has been approved?

Once your request is approved a Purchase Order number will be generated. An e-mail is sent to both the requestor and vendor with this information. This email will instruct the vendor on how to submit invoices once the goods have been received, or service has been provided.

Requestors can also check the status of their request by navigating to MMA Purchase Order Request Form and selecting the link labelled "Click here to view your previous submissions & approved POs".

How do I approve a request for spend?

Approvers receive an e-mail from **MMC Oracle Notifications**. The email will include the details of the request and instructions on how to complete. Approvers will need to select *Approve, Reject, or Request Information*.

For additional resources on this process, check out the iProcurement Approver Guide in our resources section of Vendor Payables.

What if I am completing the request form on behalf of someone else? Will this still go to my direct manager for approval?

When you complete the MMA Purchase Order Request Form update the Requestor Email field to the colleague responsible for this spend. This will direct the Purchase Order approval to the requestor's Workday manager.

Invoices

What if the vendor submits an approved invoice without a Purchase Order number?

Invoices submitted to AME without a Purchase Order number cannot be processed. Communication will be sent to the vendor asking them to update their invoices to reflect their designated Purchase Order number.

After the Purchase Order is approved, what if the vendor sends the invoice to me?

Invoice can be submitted to AME and you can include our team MMA Vendor AP Team. We can direct the vendor to submit the invoices via this method going forward.

Payments

How can I check the status of my request?

To view the status of your spend request, navigate to MMA Purchase Order Request Form and select link labelled “Click here to view your previous submissions & approved POs”.

How can I check if payment has been made?

Have a question about a specific invoice? Please reach out to our MMA Vendor AP Team and a member of our team will assist you.

How long does it take for payment to be made?

Standard payment terms are Net 45. Payment is calculated from the date of the invoice.

Time sensitive expenses of such as Utilities, Employee Benefits, and Client related payments have Net 3 terms.

How can I change payment terms and get a payment expedited?

Submit a signed agreement or contract listing payment terms to MMA Vendor AP Team. Our team will get the vendor terms updated.

Vendor reached out to me to update their payment method. How can I get this completed?

Forward the vendor’s request to MMA Vendor AP Team and we will assist you. If remittance or payment method needs to be updated, this may require the vendor to update their APEX profile. Our team will direct the vendor on next steps.

What if a vendor reaches out to me about a past due payment?

Reach out to MMA Vendor AP Team and a member of our team will assist you.

Setting up New Vendors

What is the process for paying a new vendor?

1. Complete MMA Purchase Order Request Form.
2. Vendor Payables team submits setup request to Global Sourcing and Procurement Team
3. Global Sourcing and Procurement Team sends vendor an APEX invite.
4. Vendor completes APEX profile.
5. Global Sourcing and Procurement Team reviews submission and completes vendor setup.
6. Vendor Payables team if notified of completed setup and submits requisition in iProcurement
7. Requisition goes through approval workflow and is converted to a purchase order.
8. Purchase orders are emailed to vendor and invoices can be submitted for processing through AME or Tungsten (if vendor is setup under this platform).

How do I get a new vendor setup in iProcurement?

Complete the MMA Purchase Order Request Form, select **New Vendor** under Vendor Status and include complete vendor contact information. The contact listed will need to be able to provide:

- Name, mailing, and remittance email address for payments
- Purchase order point of contact (name, email, phone)
- Banking Details (on letterhead or voided check)
- Legal Name, Address, and Tax ID

We recommend providing an accounting or related department as your contact, as they will have access to the above items required for setup.

I have submitted my spend request and vendor contact. What happens next?

Our team will review your submission and submit the setup request to the Global Sourcing and Procurement team. Our team will reach out to the vendor and let them know they will receive the invite to complete their APEX profile. APEX invite will be sent by the Global Sourcing and Procurement team.

What if the vendor has issues completing their profile? Can the vendor send Vendor Payables team the documents needed for setup?

Our team does not have access to the APEX portal and cannot upload documents to vendor's profile. If the vendor is having issues, please have them reach out to MMA Vendor AP Team and we can schedule a zoom call with us and the Global Sourcing and Procurement team. We can review any issues they are having and walk them through completing their profile step by step.

Vendor has completed their APEX profile, is the purchase order automatically setup?

Once the vendor completes their profile the Global Sourcing and Procurement team reviews their submission. If any items are missing, they will reach out to the vendor to complete. Once the Global Sourcing and Procurement team has completed their review, they will complete the setup of the vendor site in iProcurement. When the vendor is active in iProcurement, our team can submit the requisition.

What if the vendor does not complete the APEX invite?

The Global Sourcing and Procurement team will continue to reach out to the vendor to check on the progress and offer assistance to answer any questions or concerns they have. Our team will also reach out as needed to check on the status of the request. If the APEX invite is not complete and submitted by the vendor within 21 days, the request for setup will be closed.

If the vendor does not complete their APEX profile will that delay payment?

Yes. We cannot submit the requisition until vendor is setup in iProcurement. Vendors must complete the APEX profile and submit for Global Sourcing and Procurement team to review. Once this is complete and the vendor is setup, our team will move forward and submit a requisition.

Sponsorships & Donations

I have a sponsorship/donation request. How do I submit this request?

Complete a MMA Purchase Order Request Form with the category Marketing & Advertising. Select Donations & Sponsorships as the sub-category.

If the vendor accepts credit cards, please note this with a payment link and phone number in the additional information field.

What documents need to be attached to my sponsorship/donation Smartsheet request?

1. W-9
2. Manager/Department Head Approval
3. Compliance approval is required if the spend meets the parameters below:
    - Request is tied to a government or public entity.
    - Request is client related or spend is at the request of a client.
    - Request amount is $5000.00 or more.
4. Invoice to pay or event flyer

How do I obtain Compliance approval?

Complete your region's Compliance Smartsheet form. Once approved, print the approval email to PDF and attach to the MMA Purchase Order Request Form request.

Questions

If I need to escalate a question or concern, who do I reach out to?

Please reach out to MMA Vendor AP Team and a member of our team will assist you. Our standard response time is 1 to 2 business days.