Logistics Procedures in Expesite

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All procedures depicted below must be utilized at all times when working within Expesite in order to ensure consistency and maintain the integrity of the Logistics process.

Requesting Proposals/Quotes – Logistics or Construction PM

1. Once you have selected the vendors for a new project you will need to add them to the Team List.
2. To Request a quote you can send a Task via Expesite to initiate the Bid, contact the vendor direct by phone or in person at the job site to discuss Scope of Work.

Submitting Proposals/Quotes – Vendor Initiated

This procedure should be used to process a proposal for a vendor who has already been selected for a project.

The vendor MUST have access to the project in order to initiate a proposal.

Send Task – Vendor

1. Navigate to My World, My Tasks at the top of your screen.
2. Select New RFP
3. Search for your project.
4. Search for your Logistic Project Manager
5. Complete the following fields
    - Subject (Choose which most applies)
    - Date Due (Date you are submitting the proposal/quote)
    - Description (Description of the proposal/quote you are posting)
    - Enter any costs in the costs fields .e.g. Site, Building, Equipment, Fees
6. Use Upload Attachments to attach your proposal/quote and any other relevant documents to the task. Your proposal/quote should include breakdown of line items for labor, material, subtotal, and then tax, freight etc.
7. Click Send to submit your proposal/quote.

Note: Vendor should assign RFP to one person/contact. This will eliminate duplicate RFP submissions. You should address the RFP to the Logistic or Construction Project Manager who requested the proposal, for their review. The RFP will then be forwarded to the PM for approval.

Task Acceptance – Logistic PM

1. Navigate to My World, My Tasks at the top of your screen
2. Click on the name of the desired RFP to open
3. Click on Accept to take ownership of the task
4. Open attached proposal/quote for review.
5. If the proposal/quote is within budget, it will be approved and sent to Contract Administration for processing
6. If the proposal/quote is over the budgeted amount, Logistic Manager will click on the history tab, add a note, and notify the vendor to revise and resubmit.
7. Logistic Manager will reassign approved RFP to Contract Administration for PR processing via Ariba.

Contract POs in Expesite

Create Contract PO in Expesite – Contract Administration

1. From My Dashboard click on desired project
2. Click on Budget (in top right corner)
3. Click on Budget in question
4. Click on Create Preliminary Contracts/PO's under Plan
5. Click on New Contract/PO
6. Complete the following fields:
   - To – Vendor's name on proposal
   - Note: Check to ensure vendor is set-up in SAP. If not, choose History and add comment to PM. Refer to the New Vendor process to set the vendor up in SAP.
   - Name – (Name according to contract type) – Update to included PO# when created by Procurement.
   - Status – Executed
   - Type – Contract
   - Quote Received (Date PM assigned RFP to Contract Administration)
   - Contract Type (Select according to type)
   - Retainage – Y or N
7. Select Next and Choose the applicable WBS element(s) (Do Not Select All)
8. Click Next and Enter contract amount in Total field
9. Click Save
10. Close the task as completed

New Additional Services/Materials Request

Note: Additional services/materials will be requested using the Expesite change order tool. This is the same tool that is used to submit change orders for the general contractor.

Submit Add Services Request (Change Order) - Vendor

1. Navigate to My World, My In Box
2. Select 'Send Change Order' near the bottom of the page under 'Changes'.
3. Select the appropriate contract and the 'to' field will automatically populate with your PM.
4. Complete the following fields
   - Subject – 'Additional Services# 1, 2, 3, etc.' or 'Change Order# 1, 2 , 3, etc.'
   - Due – Date you need the request to be approved.
   - Detail – Details describing the reason for the additional services as well as a breakdown of original PO amount, change order amount and total PO amount to date
5. Click 'Continue.
6. Under 'Items', click 'New' to add your specific costs.
7. When adding a new item, be sure to include the cost and a short description of the cost in the subject field.
8. Click 'View/Edit' attachments to attach supporting documentation, or a detailed proposal.
9. Click Submit to submit your Change Order, adding any additional comments you would like to include in the email notification.

Note: After the Change Order is approved it will no longer appear in 'My Inbox'. You can see it by selecting View Achieve.

Approve Add Services Request (Change Order) – Logistic PM

1. Navigate to My World, My In Box
2. In the 'Changes' area (towards the bottom) select the Change Order to be approved.
3. Review any attached documentation by clicking 'View/Edit' attachments.
4. If required, add a history note and notify your manager/director for approval.
5. Click Approve or Deny, adding comments for the vendor if denied
6. If approved, the request will *automatically* be forwarded on to the Contract Administration Team for processing. No history note is required.
7. Click Close

Note: Denied Change Orders will automatically be sent back to the sender where they have the opportunity to modify and resubmit the same Change Order.

New Invoice

Submit Online Invoice for Approval - Vendor

1. Navigate to My World, My In Box
2. Select 'Send Invoice / Pay App' near the bottom of the page.
3. Select the appropriate contract and the 'to' field will automatically populate with your PM.
4. Complete the following fields
    - Name/Number – Enter your invoice number (*Only use alphanumeric – spaces, dashes, and hyphens are unacceptable for EDI-enabled vendors*)
    - Remit To Address – address where payment will be mailed.
5. Click 'Next'
6. Enter the dollar amounts for each category for the invoice being submitted.
7. Click 'Save'
8. Click 'View/Edit' attachments to attach a PDF copy of your invoice, and any other supporting documentation (scans of lien waivers, excel breakdown sheets, etc). Freight and Tax should be listed as separate line items.
9. Click Submit Request to submit your invoice, adding any additional comments you would like to include in the email notification.
10. Click Send.

Note:

- After the invoice is approved, it will no longer appear in 'My Inbox'. You can see it by selecting 'View Archive' under 'Invoices/Pay Apps'.
- Only one invoice per submittal. **Do Not combine multiple invoices.**
- Once your PM has denied or approved the request you will receive an automatic email notification. If the request has been denied, you will be given the opportunity to resubmit the same invoice once the appropriate modifications have been made as requested by the PM. **Do NOT create a new invoice.**
- Upon receiving the approval notification, **all non-EDI vendors must send the invoice to Non Merchandise Payables for payment processing.**

Approve Invoice – Logistic PM

1. Navigate to My World, My In Box
2. In the changes area (towards the bottom) select the Invoice to be approved.
3. Review any attached documentation by clicking 'View/Edit' attachments.
4. Click Approve or Deny, adding comments for the vendor if denied
5. Click Close

Submit Approved Invoice for Payment – Vendor

1. Once you have received notification that the Expesite invoice has been approved, all non-EDI vendors must send a paper copy of the approved invoice to Non Merchandise Payables for payment processing.

   Non-Merchandise Payables
   The Home Depot
   PO Box 105715
   Atlanta, GA 30348-5715

Note:

- Please direct all payment inquires to the Financial Operation's Call Center.
  Call (877) 434-6435 option 2 or Email Fin opshelpdesk@homedepot.com
- You must include the Home Depot PO number with all inquires.
- If your issue cannot be resolved by the Call Center associate, they will provide you with a "vantive ticket number" and assign the open ticket to the respective Payables processing team for resolution.