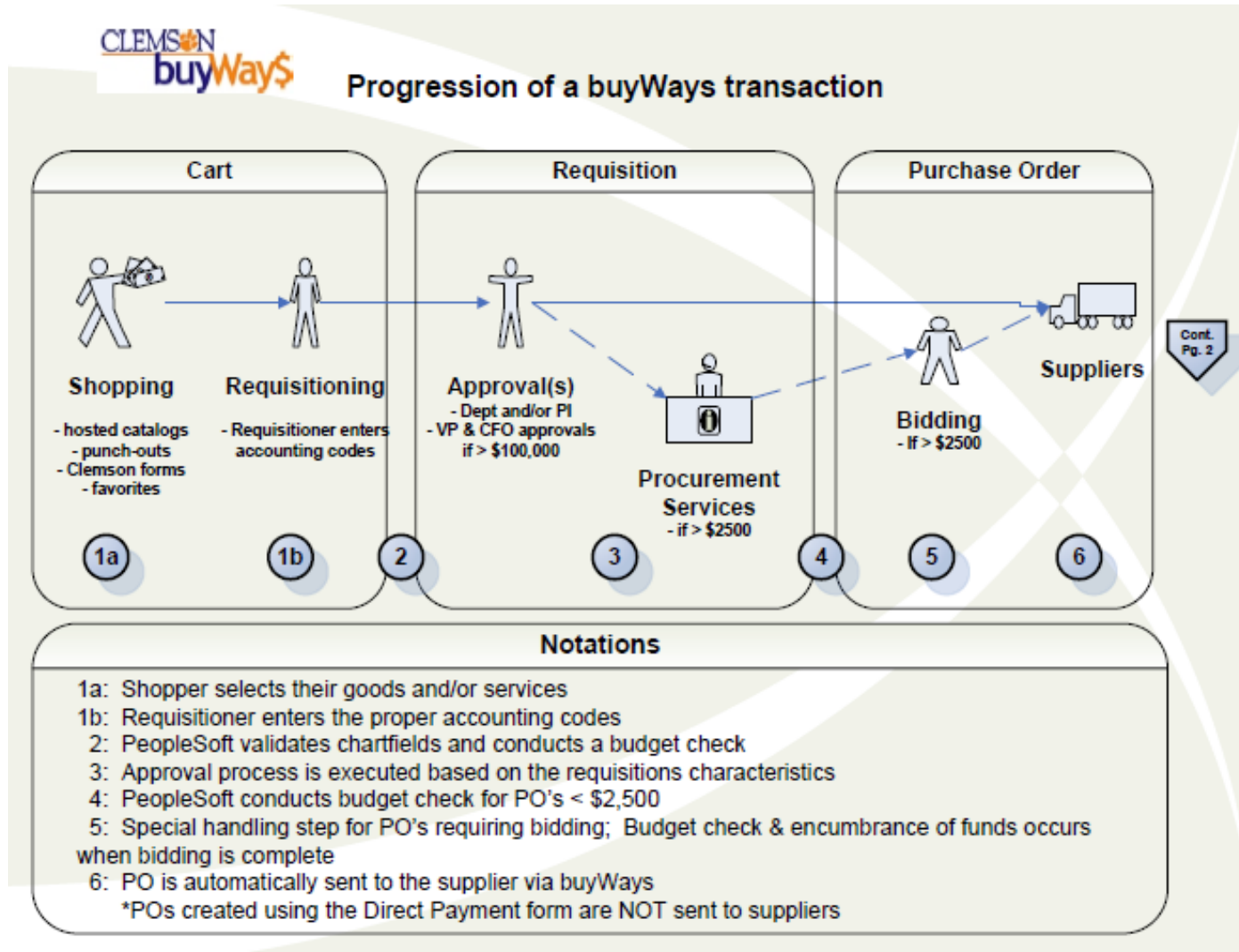


buyWays Shopping

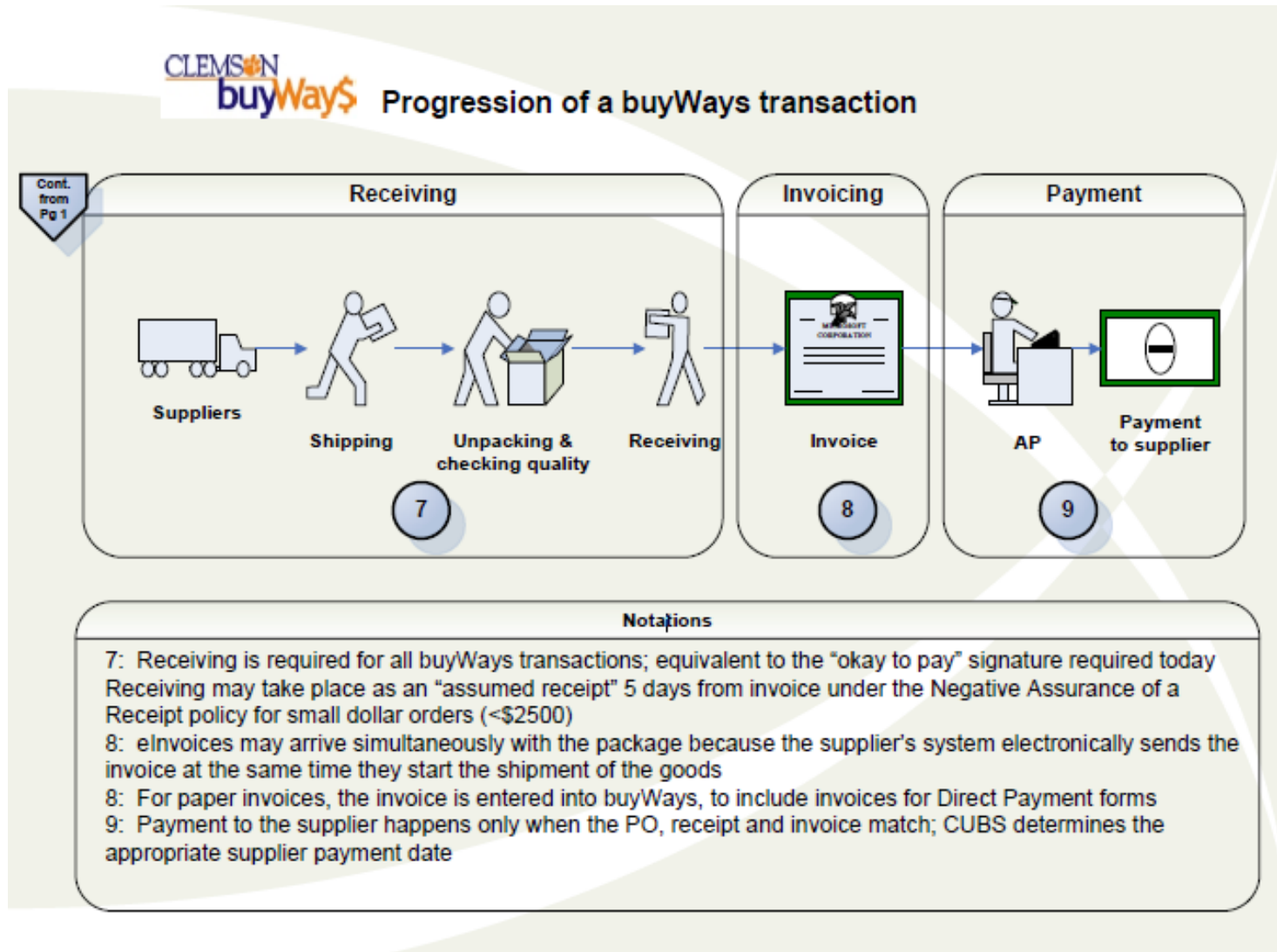
Last updated July 2011

1. State and Clemson-specific contract pricing
2. Search results guide you to right contract suppliers
3. Gained efficiencies because the shopper researches and selects the goods/services they need without having to convey this information via email or paper messages
4. Ability to see previously purchased items that you or others have purchased so you can purchase the same items
5. Ability to compare pricing on hosted catalog items, so you can get the best price for your needs
6. Ensures departments comply with approval and audit guidelines

Progression of a buyWays Transaction



Progression of a buyWays Transaction



Approval Workflow Steps



Requisition Approval Workflow Steps

Based on the characteristics of the requisition (amount, types of purchases and form type), the workflow is programmed to obtain appropriate approvals based on the criteria noted below.

Note: The majority of your requisitions will have a limited number of approval steps.

Approval Step	Activated by	Approver
Auto Approval	\$ limit set by department	Requisitioner (upon submit)
Department	\$ limit set by department	Department approver
Project	\$ limit set by department	Project approver
Project Coordinator	\$ limit set by business office	Grants coordinator
SPAA	If fund 20 & accounting code=7004, 7005 & 8xxx	Sponsored Programs
Form approvals	<i>Dependent on the form</i>	
Buyer 46	>= \$2,500 and < \$10,000 & not on contract	Certified buyer 46
Director of Procurement	Sole source or vehicle or trade-in	Mike Nebesky
Purchasing Gatekeeper	>= \$2,500 & not on contract	Mike Nebesky or Scott Pigeon
Purchasing Agent Review	>= \$2,500 & not on contract that requires bidding	Buyer
Comptroller	Sole source	Charles Tegen
Notifications	These do not stop the approval process	
Hardware/Software	Hardware or software purchase >= \$2,500	CCIT
EH&S	Controlled substance, recycled, hazardous, radioactive, rad-minor, select agent, toxin, energy star & green	EH&S
Equipment Inventory	Accounting code = 8xxx and >=\$5,000	Property Control

Accounting Code Set up in Profile

- ❑ Users can store combinations of favorite accounting codes in their profiles and access them on the cart.
- ❑ Users who buy for different projects and/or split purchases across different codes, can store these frequently used combinations in their profiles and quickly select to use them during checkout.

A code favorite is given a name by the user in order to be easily identified on the profile of the cart.

Users have a new tab on their profile called Code Favorites in the profile under the Purchasing Custom Fields tab.

The screenshot shows a user profile page with a navigation bar at the top. The 'Purchasing' tab is selected, and the 'Code Favorites' sub-tab is active. Below the navigation, there is a table of accounting code favorites. The first entry is 'office supplies (default)'. Below the table, there is an 'Add' button and a table with columns for Account, Fund, Dept, Program, Class, and Project.

Account	Fund	Dept	Program	Class	Project
7201 Supplies:Office	15 CU - State - E and G	5365 Procurement Services	602 Fiscal Operations	130 SC App E&G and Deptl Revenues	1500000 Departmental Default

☐ Hosted catalog *

- Search items by entering known information in the “Shop: All” section
 - Description, SKU, Supplier and/or CAS # in the Shop Bar
 - Notes about searching:
 - The plural of a word (beakers versus beaker) can impact search results; recommend using plurals
 - Search results scan item descriptions and categories; so you may get unexpected results because of the category the item falls within
 - Upon receiving your search results, refinements can be made using the left results section (drill down by supplier, category, packaging UOM)
 - If you are not finding what you need, select “Advanced Search” and check “Similar Items” or utilize the other advanced search features and try your search again
- Another approach is to start your search by utilizing the “additional search options” and drill down by Supplier or Category
 - Category search allows you to drill down multiple levels to get to the search results you desire

☐ Hosted Catalog – other features

- Quick Order feature is available if you know your catalog numbers (SKU); allowing you to skip the searching for items
- Ability to compare prices across several items
- Ability to save frequently purchased items as favorites; allowing you to speed up your purchasing in the future

- Notes:
 - Our punch-out suppliers have provided us with product/category descriptions, so their punch-out will appear in the search results and guide you to their site when they provide the searched item
 - For contracted items that are not hosted catalog items or punch-outs, buyWays will provide a Contract Vendor Form with the contracted supplier information and contract number filled in for your convenience
 - If you did not find your item, it is possible that Clemson may not have a contract for these goods/services. Feel free to click the link on the left side of the home page labeled “Can’t find what I am searching for” and Procurement will assist you.

☐ Favorites *

- Expedites shopping for frequently purchased items from electronic catalogs or Clemson Forms
 - Shared Folders are typically set up at a department or college level and the users must be granted administration rights to set up shared folders
 - Contact cubuyways@clemson.edu if you are able to set up shared folders within your college
 - Personal Folders are for you to establish your frequently purchased items

☐ Punch-out *

- Special Quotes
 - Most punch-outs allow you to pull up a special quote prepared by a sales rep so it can be brought back into buyWays without re-entering the items (Examples: Fisher, VWR, Dell, CDW-G, Sun, ThatWorks, Young Office)
- Availability
 - Most punch-outs will provide you with the product's availability in your shopping cart
- Favorites
 - Most punch-outs allow you to save frequently purchased items on their site
- Order status
 - Most punch-outs provide you the ability to view your order status (back orders, etc.)

☐ Non-catalog Item versus Non-catalog Form *

■ Non-catalog Item

- Useful for entering known items into your cart when there is no need for adding a detailed explanation

■ Non-catalog Form

- Best for anything greater than \$2500 because the form allows for a detailed explanation to be added to the requisition to assist with the bidding process

■ Notes:

- If you do not know the right supplier to purchase your item from, select “Supplier Unknown” and Procurement Services will assist you
- Include shipping and handling charges for non-catalog items or form
- Within the Clemson Form, bolded items are required fields – all other fields are optional
- Include shipping and handling costs for Non-catalog, Sole Source and Vendor Quotes

Clemson Forms – other shopping forms *

- Non-catalog Form
 - Purchase products/services that are not available through the Clemson buyWays marketplace
- Procurement Certification Form
 - Purchase goods and/or services that are Exemption 44 (Grant Specified Procurement)
- Sole Source Form
 - Request a sole source procurement purchase for goods and/or services; eliminating the need for a bidding event
- Vendor Quote Form
 - Purchase goods and/or services you have received a special quote from a vendor

Shopping – Clemson Forms

- ❑ Clemson Forms are custom order forms for buyWays suppliers with unique shopping requirements that would not fit the catalog or punch-out approach
 - Carpet/Flooring Request Form - Use this form to order carpet under the Clemson carpet contract
 - Car Rental Payment Form - Complete this form for invoices that need to be paid to Enterprise Leasing Co Southeast
 - Cancel/Close PO Request – Use this form to notify Procurement Services of needed PO changes or to close a PO
 - Delete/Hold Invoice Form - Use this form to notify Procurement to cancel or hold an invoice
 - Direct Payment Form - Complete this form for any recurring or ongoing payments for which a previous PO has not been completed
 - Name Badge Form - Complete this form to place a name badge order
 - Non-catalog Form -- Use this form to add products/services to your cart that are not available through a punch out supplier or from a hosted catalog supplier
 - Procurement Certification Form -- Use this form to place Exemption 44 (Grant Specified Procurement) orders
 - Payment Request Form - Complete this form for any ONE TIME payment for which a previous PO has not been completed. The amount of this PO **WILL NOT** be encumbered
 - Sole Source Form -- Use this for to request a sole source procurement
 - Trade-In Form -- Use this form when requesting a purchase where a vendor will be giving Clemson credit for an item we will give them as a trade-in
 - Vehicle Purchase Form -- This form should be used to request the purchase of a new vehicle
 - Vendor Quote Form -- Use this form when you have received a special quote from a vendor. Using this form will ensure proper handling of the quote

Edit the Cart

Shopping Cart

100 Item(s) Subtotal: **350.00** USD

2010-10-28 jtonkin 01

Out to Bid

Priority: Normal

Supplier / Line Item Details

Bruce Air Filter Company

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Air filter		EA	3.50	100 EA	350.00 USD
Supplier subtotal					350.00 USD

Total: 374.50 USD

- Option to modify the cart name to something more descriptive
- Option to enter a description (i.e., noting the grant/project or lab)
- Click the Proceed to Checkout to review your cart or Assign Cart to Requisitioner

Cart Review

active cart | draft carts | favorites | my requisitions

General
 Shipping
 Billing
 Accounting Codes
 Internal Notes and Attachments
 External Notes and Attachments
 Final Review
 [Assign Cart to Requisitioner](#)

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account

Requisition | Req Approvals (VIEW ONLY) | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header

General	Shipping	Billing
Cart Name 2010-10-28 jtonkin 01 edit Description no value Priority Normal Requisitioner Jennifer Tonkin Contact Phone Number no value Shopper Jennifer Tonkin Out to Bid x	Ship To edit Attn: Jennifer Tonkin Fl/Rm/Ste: - Procurement Svcs Administrative Svcs Bldg 108 Silas N. Pearman Blvd Clemson, SC 29634-5365 United States	Bill To edit Attn: Jennifer Tonkin Fl/Rm/Ste: Procurement Svcs Administrative Svcs Bldg 108 Silas N. Pearman Blvd Clemson, SC 29634-5365 United States
	Delivery Options edit Requested Delivery Date no value	Billing Options edit Accounting Date no value

View/edit by line item...

Accounting Codes					
Account	Fund	Dept	Program	Class	Project
no value Required field	15 CU - State - E and G	5365 Procurement Services	602 Fiscal Operations	130 SC App E&G and Deptl Revenues	1500000 Departmental Default

The bill to and ship to information *should* default for you, if it does not default, click the **edit** button to select the appropriate Bill To and Ship To address – see more info on next slide

Shopping – General Information

Bill To and Ship To addresses

- Are set up for most users by default
- If this information does not default for you, click the edit button to select the appropriate Bill To and Ship To address
 - Search by your four digit department # OR
 - Type in your building name in the description box to select.
- “Fl/Rm/Ste” line
 - Only the room number should go in this field
 - **Do not** duplicate building name
 - Supplier interfaces have limitations that we must accommodate and our guidance will ensure you get your item successfully

Internal notes & attachments

- Only viewed by Clemson buyWays users
- Useful for conveying purchase justification, project/grant detail or general information

External notes & attachments

- Use sparingly or not at all
- Most supplier’s systems automatically place the PO with an external note into their exception queue – which slows down the order
- Placing “urgent” into this field does the exact opposite- it slows the order down

Assign Cart or Proceed to Checkout from Shopping Cart

Cart - Draft Requisition

Jennifer Tonkin my profile | logout

2010-10-28 jtonkin 01 | 100 item(s), 374.50 USD

quick search for Req No. [] Go

home/shop | favorites | clemson forms | **my carts** | search history | my profile | more >>

active cart | draft carts | favorites | my requisitions

Continue Shopping

Shopping Cart 100 Item(s) Subtotal: **350.00** USD

Add Non-Catalog Item Save Proceed to Checkout or **Assign Cart to Requisitioner**

Cart Name: 2010-10-28 jtonkin 01 Out to Bid:

Description: []

Priority: Normal

Supplier / Line Item Details

Show line details For selected line items Add To Favorites Go

Bruce Air Filter Company more info... Contract Number: no value PO Number: To Be Assigned

Add non-catalog item for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Air filter more info...		EA	3.50	100 EA	350.00 USD
Supplier subtotal					350.00 USD

Assign Cart to Requisitioner

active cart | draft carts | favorites | my requisitions

General
 Shipping
 Billing
 Accounting Codes
 Internal Notes and Attachments
 External Notes and Attachments
 Final Review
 Assign Cart to Requisitioner

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account

Requisition | Req Approvals (VIEW ONLY) | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header | Hide value descriptions

	General	Shipping	Billing
Cart Name	2010-10-28 jtonkin 01 edit	Ship To edit	Bill To edit
Description	no value	Attn: Jennifer Tonkin	Attn: Jennifer Tonkin
Priority	Normal	Fl/Rm/Ste: -	Fl/Rm/Ste:
Requisitioner	Jennifer Tonkin	Procurement Srvc	Procurement Srvc
Contact Phone Number	no value	Administrative Srvc Bldg	Administrative Srvc Bldg
Shopper	Jennifer Tonkin	108 Silas N. Pearman Blvd	108 Silas N. Pearman Blvd
		Clemson, SC 29634-5365	Clemson, SC 29634-5365
		United States	United States

Accounting Codes are entered by your Requisitioner

- Submitting your cart to your Requisitioner is your final step
- Optional approach:
 - Shopper selects the specific project code within the project code segment for the line item; eliminates the need for the requisitioner to interpret internal notes.

Assign Cart pop-up

The screenshot displays the 'Cart - Draft Requisition' interface. The main content area shows a shopping cart for '2010-10-28 jtonkin 01' with 100 items and a total of 374.50 USD. A pop-up window titled 'Assign Cart' is open, highlighting the 'Assign Cart To:' dropdown menu. The dropdown menu has two options: 'Select profile values' and 'Search for an assignee'. Below the dropdown is a text field for 'Note To Assignee (via email):'. A note states: 'Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.' At the bottom of the pop-up are 'Assign' and 'Cancel' buttons.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Air filter		EA	3.50	100 EA	350.00 USD
Supplier subtotal					350.00 USD

•For most users there is a default requisitioner, if no default is displayed, do one of the following:

- Select a requisitioner from your profile values OR
- Search for your requisitioner by clicking Search for an assignee

Receiving

Receiving is required for all buyWays transactions; equivalent to the “okay to pay” signature required today. Receiving may take place as an “assumed receipt” 5 days from invoice under the Negative Assurance of a Receipt policy for small dollar orders (<\$2500)

A receipt is required for all buyWays transactions

To complete a receipt do the following steps:

- Review/open your PO by using the quick search in the upper right section of buyWays
- Choose **create quantity receipt** or **create cost receipt** from the **Available Actions** drop down menu on the top right of the PO
- Enter a packing slip # - if there is not a packing slip, simply enter in “none”
- Enter the date that items were receive
- Receiving items
 - Ensure the quantities reflect what was received
 - Click the **Complete** button near the top of the page

Partial receipts

- Only receive the lines that were delivered
- Remove all lines that have not been delivered

Returns – notify the supplier immediately where a return/exchange is necessary

- Click on the Receive and Return link below the quantity field and then fill in how many were received and how many are being returned then select the **Complete** button

Helpful tips

- You should not scan the packing slip - It is not needed by internal audit nor for the records retention policy
- Delivery section is not required – do not take the time to fill this in since it is not currently being used

Tracking Your Orders

- ❑ Tracking your requisition or PO
 - Search history > My Requisitions > Requisition History
- ❑ Reporting/inquiries on your history – walk through setting up saved queries
 - Search history
 - PO history
 - Requisition history
 - Receipt history
 - Invoice history

buyWays online information located:

- <http://www.clemson.edu/cfo/procurement/buyWays/index.html>

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