

1) Getting Started

LOGIN to BUYWAYS

- Click the **buyWays Faculty/Staff icon** on the Procurement Services Home page
- Login to buyWays using your Novell user ID and password
- New Users should complete the New User Request Form located here: <http://www.clemson.edu/cfo/procurement/buyWays/newuser.html>

2) Profile Set Up

UPDATE PERSONAL INFORMATION

- Click the **My Profile** link on the navigation bar **or** next to your name at the top of the page
- The **User Setting** tab is displayed
- Review/Edit any information
- Click **Save before** clicking on another tab
- Review the **User Guide** on the Procurement Training site for additional instructions on updating your profile default settings

3) Shopping – Creating a Cart

HOSTED SUPPLIER CATALOGS

- From **home/shop** page
- Use the **Shop** bar at the top, enter search term, then click **Go**
- For more search options click on the **advanced search**
- Click the **Shopping Cart** icon in the **Add to Cart** column of desired item to select item
- Follow **Submit Active Cart** instructions below

-OR-

EXTERNAL (PUNCH-OUT) CATALOGS

- From **home/shop** page,
- In the **search punch-out catalogs** area, click supplier's icon to begin punch-out session
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the item(s) to your active cart
- Follow **Submit Active Cart** instructions below

-OR-

CLEMSON FORMS

- From **home/shop page**, click on the **shop** tab
- In the **Clemson Forms** section **click** on the appropriate form
- **Read** form's General Instructions
- Select **Add and Go to Cart** to enter one item
- Select **Add to Cart** to add to cart to continue adding items using the same form
- Click **Go**
- Follow **Submit Active Cart** instructions below

4) Modifying an Active Cart (not all steps in this section are required)

REMOVE ITEMS FROM CART

- Open **Active Cart**
- Click **Check box** on right of Ext. Price
- Select **Remove Selected Items** from **For selected line items** drop down menu
- Click **Go**
- Click **Save**

APPLY CONTRACT TO ITEM(S)

- When using a form
 - After selecting a supplier
 - Click **select contract**
 - Choose applicable **contract #**
 - Click **Ok**
- For punch-out item, catalog or non-cat item already added to the cart
 - Click **Select price or contract...**
 - Choose applicable **contract #**
 - Click **Ok**
 - Click **Save**

CHANGE PRODUCT QUANTITY

For Catalog items only already added to cart

- Modify number in **Quantity** field
- Click **Save**

For Form Quantities and Amounts Already Added To Cart

- Click on **the product description of item** to open the form
- Modify the quantities and/or amounts
- Select **Save** in the drop down menu and click **GO**
- **Close** the form window – continue with Step # 5 below

For Punch-out items – not available for all punch-out suppliers

- Click **MODIFY ITEMS**
- Modify quantity
- Click Checkout / follow supplier's check out procedures

OR

- Remove items from cart
- Return to supplier's punch-out site to add necessary quantities

MODIFY ACCOUNTING CODES AT THE HEADER

- Click **Proceed to Checkout**
- Click **Accounting Codes** tab at top
- Click **Edit** (at the top is for the Header level)
- Enter the appropriate code in the corresponding box **or** Click **Select profile values** or **Select a CU value** or **Select a code favorite**
- Click **Save**

SPLITTING ACCOUNTING CODES AT LINE

- Click on **Accounting Codes** tab
- Click **Edit** at line (this will apply to the line and override the Header values)
- Click **Add split**
- Select **% of Qty, % of Price, Amount of Price, or Amount of Qty**
- Click **Select profile values** or **Select a CU value** or **Select a code favorite** to choose pre-saved values for accounting codes
- Enter correct **%** or **amount** beneath the price/quantity drop down menu for each chart string/project
- Click **Save** to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS

- Click **Proceed to Checkout**
- In the Internal Notes and Attachments, click **Edit** button
- **Add** a note
- Click **Save**
- Click **add attachment**
- **Browse** to find attachment
- Choose attachment
- Click **Save**

ADD EXTERNAL NOTES (TO SUPPLIERS)

External notes and attachments are for Clemson forms or non- catalog items **only**

- Click **add attachment**
- **Browse** to find attachment
- Choose attachments
- Click **Save**

5) Submit or Assign An Active Cart

- Once lines/items have been added to cart and modified if necessary
- Click **Proceed to Checkout** button above order and review order for correctness
- Click **Assign Cart to Requisitioner** and select assignee; click **Assign**

-OR-

For Requisitioners - skip previous step, click **Submit Req for Approvals**

6) Tracking a Requisition

FIND A REQUISITION

- Click **search history** tab
- Click **my requisitions** tab or Click **requisition history** tab
- Click **by Requisition** tab
- Place a check in the **Filter** check-box
- Enter **search criteria** or **select a date range** from calendar
- Click **Search** button – results should display
- Click the **Requisition Number** link
- View the summary, detail, approval status or history and add notes or comments if needed

See [Quick Reference Guide for Reporting and History for Additional Search History Options](http://www.clemson.edu/cfo/procurement/buyWays/training.html): <http://www.clemson.edu/cfo/procurement/buyWays/training.html>

7) Withdrawing an Pending Requisition

WITHDRAW ENTIRE REQUISITION

- From home/shop page, click **My Requisitions** link in the **My Dashboard** box
- Click the **Requisition Number** link
- In **Available Actions** drop-down menu, select **Withdraw Entire Requisition**
- Click **Go**
- In message box **type your reason**
- Click **Withdraw Entire Requisition**

WITHDRAW A LINE

- From home/shop page, click **My Requisitions** link in the **My Dashboard** box
- Click the **Requisition Number** link
- Check the appropriate **checkbox** to the right of item price
- In **For selected line items** drop-down menu, Select **Withdraw Selected Items**
- Click **Go**
- In message box **type your reason**
- Click **Withdraw Line Items**

8) Receiving - Creating a Receipt

CREATING A RECEIPT

- From the **quick search for** drop down list (top right), Select **PO No.**
- Enter the **PO number** in the box on right and click **Go**
- Review the PO information on the PO Status page
- From **Available Actions** drop-down menu, choose **Create Qty** or **Create Cost Receipt** and click **Go**
- The receipt will automatically be populated with the PO information
- Enter **Packing Slip #** (required), and/or Notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select **Complete**

CREATING A PARTIAL RECEIPT

- From the **quick search for** drop down list (top right), Select **PO No.**
- Enter the **PO number** in the box on right and click **Go**
- Review the PO information on the PO Status page
- From the **Available Actions** drop-down menu, choose **Create Qty** or **Create Cost Receipt** click **Go**
- Review and **modify** pre-populated quantity or amount
- If line item(s) has not been received, click **Remove Line**
- Enter **Packing Slip #** (required), and/or Notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select **Complete**

CREATING A RECEIPT WITH RETURN/CANCELLED

- From the **quick search for** drop down list (top right), Select **PO No.**
- Enter the **PO number** in the box on right and click **Go**
- Review the PO information on the PO Status page
- From **Available Actions** drop-down menu, choose **Create Qty** or **Cost Receipt** and click **Go**
- For one of the lines that was previously received, enter a quantity and change Action to **Returned** or **Cancelled**
- Review line level data
- Select **Complete**

DELETING A COMPLETED RECEIPT

(Can only be done if an invoice has not been completed)

- From the **quick search for** drop down list (top right), Select **Receipt No.**
- Enter the **Receipt number** and click **Go**
- Click on the **receipt number** to open receipt
- Click **Reopen Receipt**
- Click **OK**
- Add appropriate comments (required)
- Click **Add Comment**
- Modify Quantity, Amount, Date or packing slip no.
- Click **Complete** **OR**
- Click **Delete box**
- Click **OK**

DELETING A DRAFT RECEIPT

- Click **invoices/receipts** tab | Click **draft receipts** tab
- Click **Delete** box

9) Modifying a Purchase Order

CANCEL A PO OR PO LINE

- From **Clemson Forms** section on the home/shop tab
- Click **Cancel/Close PO Request** form
- **Read** form General Instructions
- **Enter** required fields
- Select **Add and Go to Cart**
- Click **Go**
- See instructions for **Submit an Active Cart**

INCREASE QTY OR PRICE ON PO

- **Option 1** – follow cancel instructions above and create a new PO to increase total purchased value,
- **Option 2** – create a new order for the difference referencing the original PO number in internal notes section

10) Invoicing - Create an Invoice or Credit Memo

CREATING A COMPLETE INVOICE OR CREDIT MEMO

- From the home/shop page, Select **PO No.** from the **quick search for** drop down list (top right)
- Enter the **PO number** in the box on right and click **Go**
- From the available actions (top right), select **Create Invoice** or **Create Credit Memo** and click **Go**
- Enter **required fields** (Invoice #, Invoice date, and County) and click **Save**
- Ensure line quantities and amounts match the supplier's invoice or credit memo quantities and amounts
- Modify tax when necessary in the header section
- Click **Review** box at top right
- Click **add attachments** (in Notes/Attachments box) to attach a scanned copy of the supplier invoice or credit memo when possible
- Click **Complete** box

VERIFY PAYMENT OF A COMPLETE INVOICE OR CREDIT MEMO

- Refer to the **Payment Information** block on a complete invoice or credit memo to view payment date, status, method and record number

11) Approve/Reject a Pending Requisition

APPROVE via EMAIL

- Setup Email Approval Code in **my profile > user identification > enter approval code** and click **Save**
- **Open** Approval Email
- Review Requisition details
- Click **Take Action**
- **Select** an Action
- Enter **Email Approval Code**
- Click **Submit**

APPROVE In buyWays

- From **home/shop** page in **my dashboard**, click **View my approvals**
- Click the **Requisition Number** link
- Review the items, ship to address, Accounting Codes, notes, etc
- Select **Approve/Complete Step** in the Available Actions drop-down menu
- Click **Go**
- Approved Requisition will be listed in the requisition outbox

REJECT A REQUISITION

- From **home/shop** page, in **My Dashboard**, click **View my approvals**
- Click the **Requisition Number**
- From **available actions** select **assign to myself**, click **go**
- Check **checkbox** on line items to be rejected
- Select **Reject Selected Items** from the action drop-down menu
- Click **Go**
- **Reject Line Reason** box appears - type in your reason for rejecting the item(s)
- Click **Reject Line Items**
- Select **Approve/Complete Step** in the Available Actions drop-down menu
- Click **Go**

For additional Approval options, review the Approval Training document on the **Procurement Services Training website:**

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