buyWays Quick Reference Guide 2023

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1. Getting Started

LOGIN to buyWays

- Click the buyWays Faculty/Staff icon on the Procurement Services Home page
- Login to buyWays using your Clemson directory password
- New Users should complete the New User Request Form located here: https://www.clemson.edu/procurement/faculty-staff/buyways/new-user-request.html

2. Profile Set Up

UPDATE PERSONAL INFORMATION

- Click the user icon in the top right of the screen, then View My Profile
- On the left, click on what you'd like to edit (i.e. phone number)
- Review/Edit any information
- Click Save before clicking on another tab

3. Shopping – Creating a Cart

HOSTED SUPPLIER CATALOGS

- From the Shopping Home page
- Use the Shop bar at the top, enter search term, click GO
- For more search options, click on advanced search
- Click on Add to Cart option, or Order from Supplier for the item
- Click on View Cart to open cart or Checkout if punch-out supplier
- Follow Submit Active Cart instructions below (#5)

EXTERNAL (PUNCH-OUT) CATALOGS

- From the Shopping Home page
- In the punch-out catalogs area, click supplier's icon to begin session
- Search in supplier's site for items and add to supplier's shopping cart
- Follow supplier's site instructions for returning the items to your cart
- Follow Submit Active Cart instructions below (#5)

CLEMSON FORMS

- From the Shopping Home page
- In the Clemson Forms – Send PO To Supplier section (bottom under punch out supplier icons), click on the appropriate form icon
- READ the form's instructions
- Select from Available Actions, Add and Go to Cart to enter one item
- Select Add to Cart if you have more than one line item and continue adding items using the same form. After the last item, select Add and Go to Cart
- Click Go

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

REMOVE ITEMS FROM CART

- Open Active Cart by clicking on the Cart at the top right of the home page
- Click the check box to the right of the. Line item that you want to remove
- Then click the down arrow action icon to the right of the Number Line
- Select Remove Selected Items from the drop down menu

APPLY CONTRACT TO ITEM(S)

- When using a form
  - After selecting a supplier
  - Click select contract
  - Choose applicable contract #, then OK
- For punch-out items, catalog or non-catalog items in your cart
  - Click select price or contract before clicking proceed to checkout
  - Choose applicable contract #
  - Click OK, then Save

CHANGE PRODUCT QUANTITY

For Catalog items only already in 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 to step #5 below

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

- Click Modify Items (above Product Description field)
- Modify quantity
- Click Checkout/follow supplier's check out procedures
  - (OR Remove items from cart and return to supplier's punch-out site to add necessary quantities)

MODIFY ACCOUNTING CODES AT THE HEADER

- Click Proceed to Checkout
- Find the Account Codes section
- Click Edit in the Accounting Codes box (pencil icon)
- Enter the appropriate code in the corresponding box OR click edit, then select profile values, select CU value or select from your favorites (heart) for pre-saved values.
- Click Save

SPLITTING ACCOUNTING CODES AT LINE

- Click Proceed to Checkout
- Click on … (jellybeans) to the left on the box at the line
- Choose Override Accounting Codes at line (this will apply to the line and override the Header value)
- Enter correct % or amount beneath the price/quantity drop down menu for each chart string
- Click Save to confirm changes

ADD INTERNAL NOTES AND/OR ATTACHMENTS

- Click Proceed to Checkout
- In the Internal Notes and Attachments section, click Edit button
- Add note, click save
- OR add attachment
- Click browse to find attachment
- Choose attachment and save

ADD EXTERNAL NOTES (TO SUPPLIERS)

- External notes and attachments are for Clemson forms or non-catalog items only
- Click add attachment
- Click Browse to find attachment
- Choose attachments and 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 accuracy
- Click Assign Cart to Requisitioner and select assignee, add note to requisitioner if needed or just click assign

For Requisitioners – skip previous step, click Submit Req for Approval

6. Tracking a Requisition

FIND A REQUISITION

- Click Orders Icon (at the left)
- Click Search select type of document
  - Or follow Search Guide steps in News and Announcement Section
- Choose My Requisitions, All Records, etc.
- Select a date range at the left
- You can filter the search by Supplier, Participant, Approved By, etc.
- Click the Requisition Number link
- View the summary detail, approval status of history and add comments if needed

7. Withdrawing a Pending Requisition

WITHDRAW ENTIRE REQUISITION

- Click Orders icon (to the left)
- Click My Orders, then My Requisitions
- Click the Requisition Number link
- In the Available Actions drop-down, select Withdraw Entire Requisition
- In message box, type your reason
- Click Withdraw Entire Requisition

WITHDRAW A LINE

- Click Orders icon (to the left)
- Click Search Documents, then My Requisitions
- Click the Requisition Number link
- Click on the …(jelly beans) to the right of the line price
- Click Withdraw Item

8. Receiving – Creating a Receipt

CREATING A RECEIPT

- Click on the Notifications tab at top right to see all notifications
- Click on PO Number that you want to receipt
- From … (jelly beans) menu, choose Create Quantity or Cost Receipt, then 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 at the top or bottom of the page

CREATING A PARTIAL RECEIPT

- Click on the Notifications tab at top right to see all notifications
- Click on PO number that you want to receipt
- From … (jelly beans) menu, choose Create Quantity or Cost Receipt, then Go
- Review and modify pre-populated quantity or amount
- If line item(s) have not been received, click Remove Line (Trashcan)
- Enter Packing Slip # (required) and/or notes (when necessary)
- Review all line level data for qty and cost accuracy
- Select Save Updates and Complete at the top or bottom of the page

CREATING A RECEIPT WITH RETURN/CANCELLED

- Click on the Notifications tab at top right to see all notifications
- Click on PO number that you want to receipt
- From … (jelly beans) menu, choose Create Quantity or Cost Receipt, then Go
- For one of the lines that was previously received, enter a quantity and change Line Status to Returned or Cancelled
- Review line level data
- Select Complete at the top or bottom of the page
- Contact Supplier for directives on physically retuning items

DELETING A DRAFT RECEIPT

- Click Accounts Payable icon (at left), click Receipts, then click View Draft Receipts
- Click Delete box beside the drafts you want to delete

9. Invoicing – Creating an Invoice (restricted to AP Admin)

MANUALLY CREATING A COMPLETE INVOICE

- Select Accounts Payable icon (on the left)
- Click on AP Home, locate the Create Invoice area
- Enter or search for the PO Number and select Create or click Go
- If you need to add attachments, choose hold for pickup, etc., then click on View Detailed Manual Entry (at left, above Simple Manual Entry)
- Enter required fields (Supplier Invoice #, Invoice Date and County), click Save
- Ensure line quantities and amounts match the supplier's invoice quantities and amounts
- Modify tax when necessary (Adjust Taxes on Invoice guide under News and Announcements)
- Click Review box at top right corner
- Click add attachments (in Notes/Attachments box) to attach a scanned copy of the supplier invoice when possible
- Click Complete (a Create box will display to continue creating invoices)

VERIFY PAYMENT OF A COMPLETE INVOICE

- Refer to the Payment Information box on a completed invoice to view payment date, status, method and record number

10. Modifying a Purchase Order

CANCEL A PO OR PO LINE

- From the Shopping Home page, under Internal Request Form
- Choose Cancel PO Request
- Read PO Change Instructions on the form
- Enter required fields
- Select Add and Go To Cart, then Go
- See instructions to Submit and Active Cart in #5

INCREASE QTY OR PRICE ON PO

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

11. Approve/Reject a Pending Requisition

APPROVE via EMAIL (Guide in News and Announcements section of home page)

- Set up Email Approval Code under My Profile, User's Name, Phone, etc, enter approval code and click Save. (Must be set up prior to receiving email notice)
- Open Approval Email
- Review Requisition details, click Take action, select an Action
- Enter Email Approval Code, Click Submit

APPROVE IN BUYWAYS

- Click on Action Items, at top right
- Click on Requisitions to Approve
- If multiple folders, click on the one you want to take action on
- Review the items, ship to address, accounting codes, notes, etc.
- Select Approve or select check box, then choose Approve/Complete Step and Go in the Available Actions drop down menu

REJECT A REQUISITION

- Click on Action Items at the top right
- Click on Requisitions to Approve
- Click on requisition number to view the complete requisition
- From Available Actions, select assign to myself, click Go
- From Available Actions, select Reject Requisition, click Go
- Reject Line Reason box appears – enter reason for rejecting
- Click Reject Line Items
- Select Approve/Complete Step in the Available Actions drop-down menu
- Click Go
- Additional approver options, view the Approving Guide on the shopping homepage under News and Announcements