

# HOW TO – Create a Purchase Order (PO) from a Contract Vendor Quote or Estimate

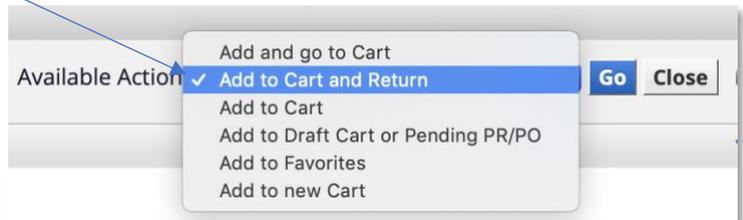
## Reminders before you begin:

- Clemson University is a State Agency & must comply with the SC Procurement Code and utilize the established State contracts.
- Contract items are available in buyWays - suppliers with contracts are indicated with a 
- Dollar limitations (see table). Meet with your accountant in advance if your order exceeds \$2500.

Dollar Limit	Required Actions
< \$2,500	Price Fair and Reasonable
\$2,500 - \$10,000	3 References
> \$10,000 (Sole Source)	Justification to Proc Director
\$10,000 - \$50,000	Public Bid
\$50,000 - \$100,000 (Protestable)	Public Bid or proposals
> \$100,000 (Protestable)	Public Bid and VP approval
> \$2,000,000 IT Purchases*	Public Bid by State Procure
> \$2,000,000 Gds/Services*	Public Bid by State Procure

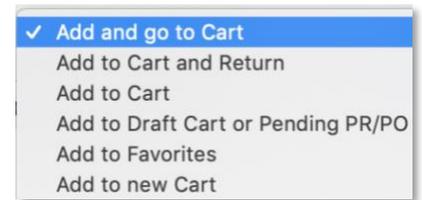
## Create a PO

- Save all backup documentation (estimate, quote, relevant email from vendor, etc.) as a PDF Each document must be saved separately if you have more than one.
- Open the Buyways portal for Faculty – Staff [clemson.edu/procurement/faculty-staff/buyways/](http://clemson.edu/procurement/faculty-staff/buyways/)
- Scroll to the bottom of the page to the **Clemson Forms – Sends PO To Supplier** section
  - Click on the **Non-Catalog I NEED TO BUY SOMETHING**
- A pop-out window will open with an **I Need to Purchase Something Form**
  - Step 1 section – enter the supplier name. If the supplier name does not automatically populate the field as you type or you can't find it using the Supplier Search link, contact your accountant for help.
  - Enter a general product description, quantity, and unit price (**without tax**) for the first item as it appears on your quote/estimate.
  - If you have additional items or any fees (shipping, handling, disposal, labor, etc.) scroll back to the top of the form and select **Add to Cart and Return** from the Available Actions drop-down menu on the top line of the form.
- Enter additional items/fees one at a time, repeating the process above until everything (except tax) that appears on your quote/estimate has been entered. Continue to the Step 2 section.
- Step 2 – skip this section unless you have this information readily available OR unless you need your order by a specific date.



- Step 3 – Complete the fields in this section as they apply to your order. Attach the backup documentation you saved by clicking on the appropriate **Add Attachments** button.
  - Internal Attachments (example = multiple supplier quotes – these documents will NOT be seen by the supplier)
  - or**
  - External Attachments (example = an estimate, quote or email received from the supplier – these documents WILL be sent to the supplier)
    - MOST of you will use the External Attachments option to add attachments
    - Add attachments one at a time
    - You may preview the attachments as they are added

- One your attachments are added, scroll back to the top of the form and select **Add and go to Cart** from the Available Actions drop-down menu. Then click the blue GO button.



- A new screen will open showing your **Shopping Cart**.
- Click on the big blue **Assign Cart to Requisitioner** button in the top right corner.
- A pop-out window will open. If the name of your requisitioner (currently Jade Jones for BioSci accounts) does not already appear in the **Select Profile values** drop-down menu, switch to the **Search for an assignee** mode (round button) and click on the **Search for an assignee** link to find the appropriate requisitioner for the project/dept you are using to pay for this order.

★ **Note to Assignee (via email) field** – you MUST enter the project number to be used to pay for this order as well as any specific details (example = R&D exempt) your accountant needs to approve and process this order in this field.

- Click the blue **Assign** button.
- On the next screen, make note of the requisition number you have been assigned for this order.

Your requisition will now go through an approval process. Once approved, a PO will be generated and sent to the supplier. Invoicing and payment SHOULD all occur within Buyways....however, if you receive an invoice directly from the supplier you must submit it to your accountant for payment.

**You are responsible for receipting your order in Buyways within 24 hours of delivery!**  
(instructions at end of this document).

**Find your cart or make a change to your Requisition before it is approved:**

- In Buyways, click on the shopping cart icon (top right of the page)
- Click on the **View My Cart** button
- Click on the **Assigned Carts** tab
- All pending carts will show here. You can view or unassign a cart at this point.

**Find an approved Requisition or Purchase Order**

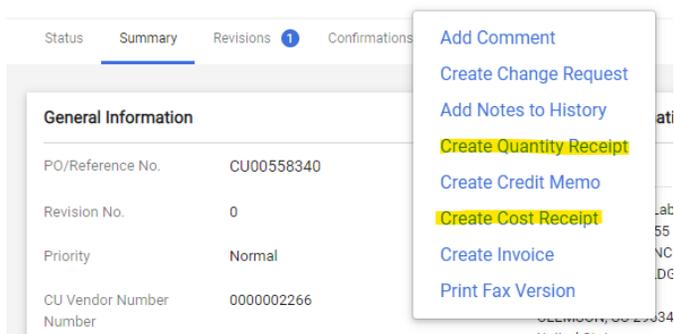
- In Buyways, click on your name in the navy blue bar (top right of the page)
- Choose one of two options at the bottom of the drop down menu – **My Recently Completed Requisitions** or **My Recently Completed Purchase Orders**
- Note that Requisition or POs will NOT appear in this list until they have been approved.

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**Receiving a Buyways Order (please receipt within 24 hours of delivery):**

- In Buyways, click on the person icon (top right of page).
- Select **My Recently Completed Purchase Orders** from the drop-down menu.
- All your POs will appear on a list.
- Click on the **PO Number** you wish to receipt in the first column (**PO No**).
- A new screen will open. Next to the purchase order number is a drop-down arrow. Click the arrow, then select “Create Quantity Receipt, or Create Cost Receipt, whichever you prefer.

Purchase Order • CU00558340 Revision 0 ▾



- A new screen will open. Enter your **Packing Slip No.** if you have one. Otherwise, enter ‘none’.
- If you have received all items ordered on your PO, click the blue **Complete** button (top right).
  - Receipt only the items you have received – if items are missing, use the **Line Details** section and edit the **Quantity** field to match the quantity you HAVE received.
  - Click the blue **Complete** button (top right).