GENERAL PURCHASING GUIDE

PROCUREMENT
PARTNERS

Welcome to *Procurement Partners*, a **Complete Commerce Automation Solution** for your organization! We make buying from vendors easy, giving you a "One Stop Shop" for all your purchasing needs. In short, *Procurement Partners' flexibility and ease of use will improve your purchasing and invoicing processes!*
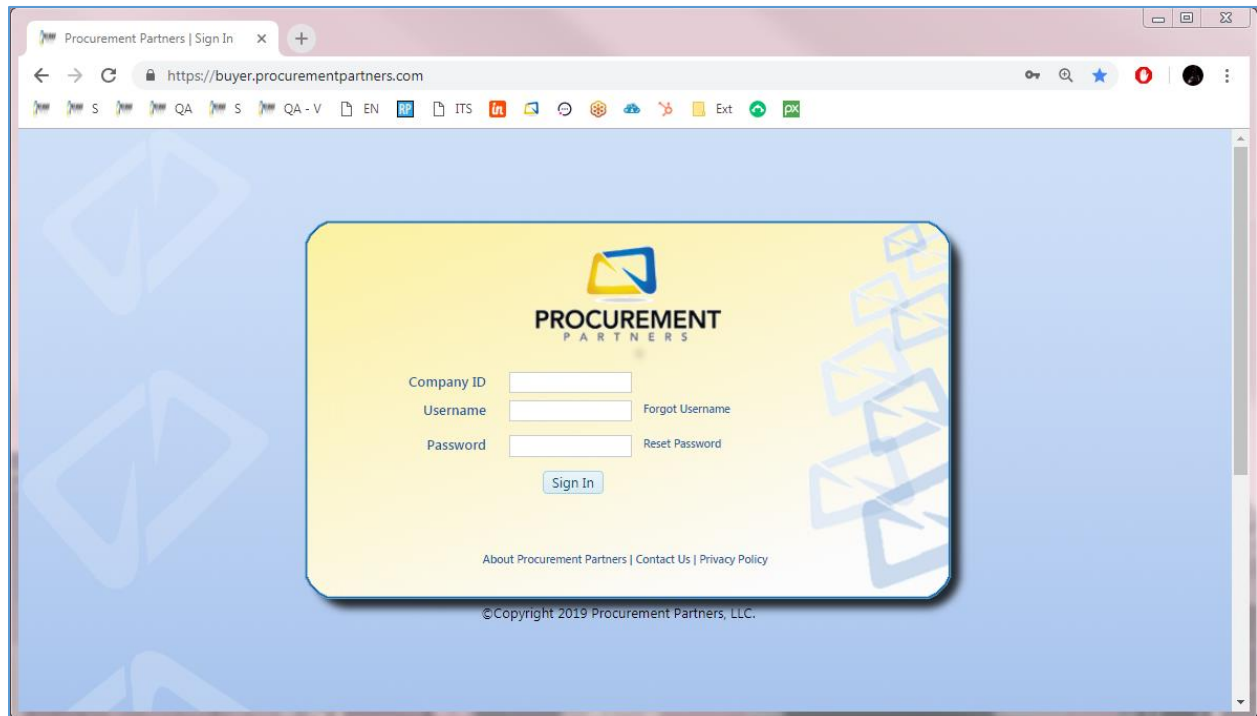
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*Want to watch **tutorial videos** to learn how to use the Procurement Partners system? Check out the **Training and Documentation Hub** available on your Home Page!*

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Logging In and Changing Your Password

PROCUREMENT
PARTNERS

Company ID
Username
Password

Sign In

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Ver. 1.1

Logging In and Changing Your Password

To log into the **Procurement Partners Buyer Portal**, navigate to https://buyer.procurementpartners.com. We suggest bookmarking or saving this page to your Favorites or desktop to easily navigate back to it in the future, as this is how you will access your integrated product catalogs moving forward.

You will log in using your **Company ID**, **Username** and **Password**. Your Company ID will be a three or four character long code that represents the organization for which you work. Your Username and Password will be provided to you when you go live with our system.

If you have forgotten your username or password, you can use the **Forgot Username** or **Reset Password** links on the log-in screen to the right of each relevant field. These will allow you to retrieve a forgotten username or reset your password.

> **NOTE**: The Reset Password function should provide you with a new password in a minute or two, but sometimes the system can take a little longer. If the Reset Password link is not generating a new password for you, or you have any other trouble with your company ID, username or password, please reach out to our Help Desk at helpdesk@procurementpartners.com.

Getting Started: The Home Page
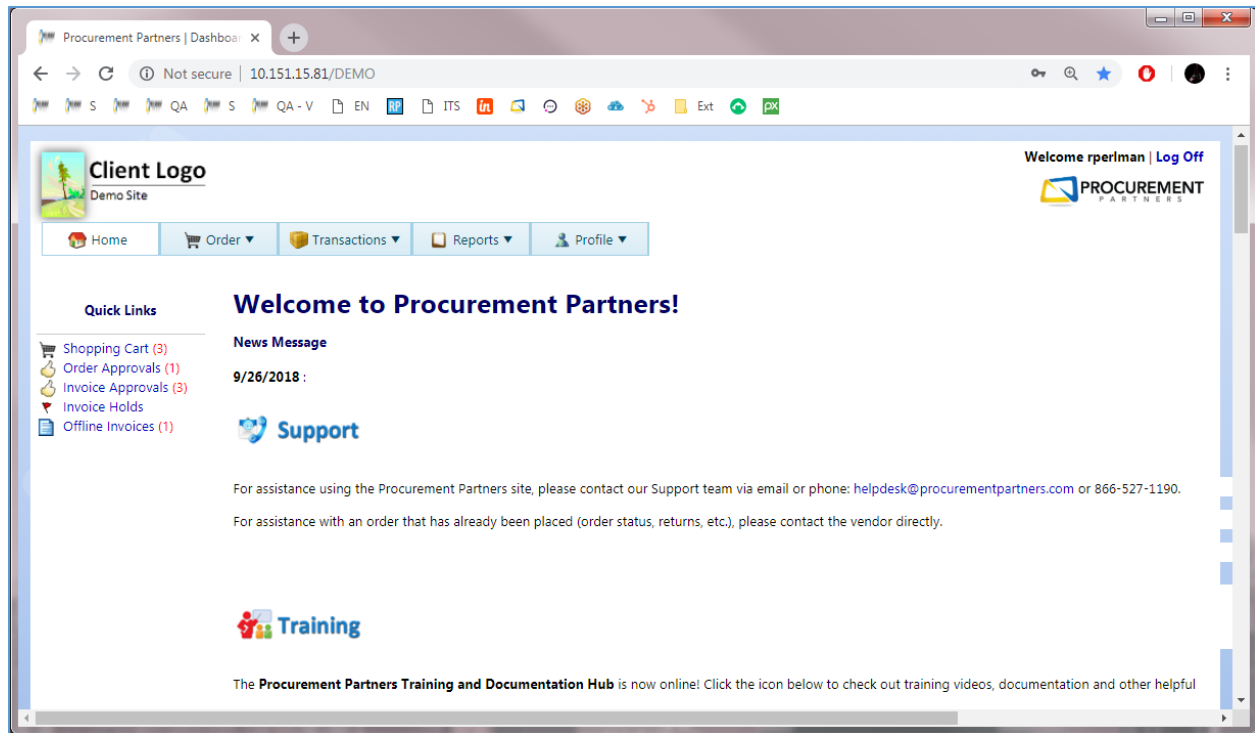
The home page will be the central platform from which you can access all the numerous features of the Procurement Partners system. This page will contain any announcements from either your corporate team or the Procurement Partners team regarding new vendor rollouts, system maintenance, upgrades or other important notes.

On the left side of this screen you will find **Quick Links** for easy access to

On the home page you will also find a few other details. The **Support** section contains our Help Desk email address and phone number; please feel free to reach out any time you need any assistance. In addition, the **Training** section contains the Procurement Partners Training and Documentation Hub as well as information regarding the Friday general training sessions. Please check your home page for up to date details!
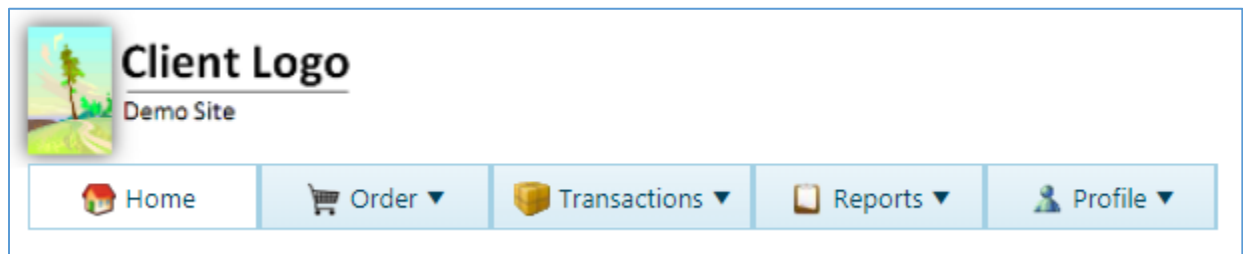
Navigation through Procurement Partners is done by using the tabs and drop-downs at the top of the webpage. The following tabs are available to all general users:

- **Home** – The tab you first see when you sign in. You may also find the Dashboard Reports tab here which contains dynamic data such as *invoices pending approval* and *spend by location / vendor*.

- **Order** – This is where you will go to do any purchasing through the Procurement Partners system. This document will be primarily focusing on the contents of this tab.

- **Transactions** – This tab allows you to look up previous orders, invoices and access some other invoice-related features within our system.

- **Reports** – This tab contains several different types of reports that can provide useful information about purchasing, invoices, GL spend and budgets (if applicable).

- **Profile** – If you would like to change your password, you can find the Reset Password link under the Profile tab.

Other tabs are available to users with higher permission levels such as System Administrators, but those will not be covered in this document.

Vendor Direct
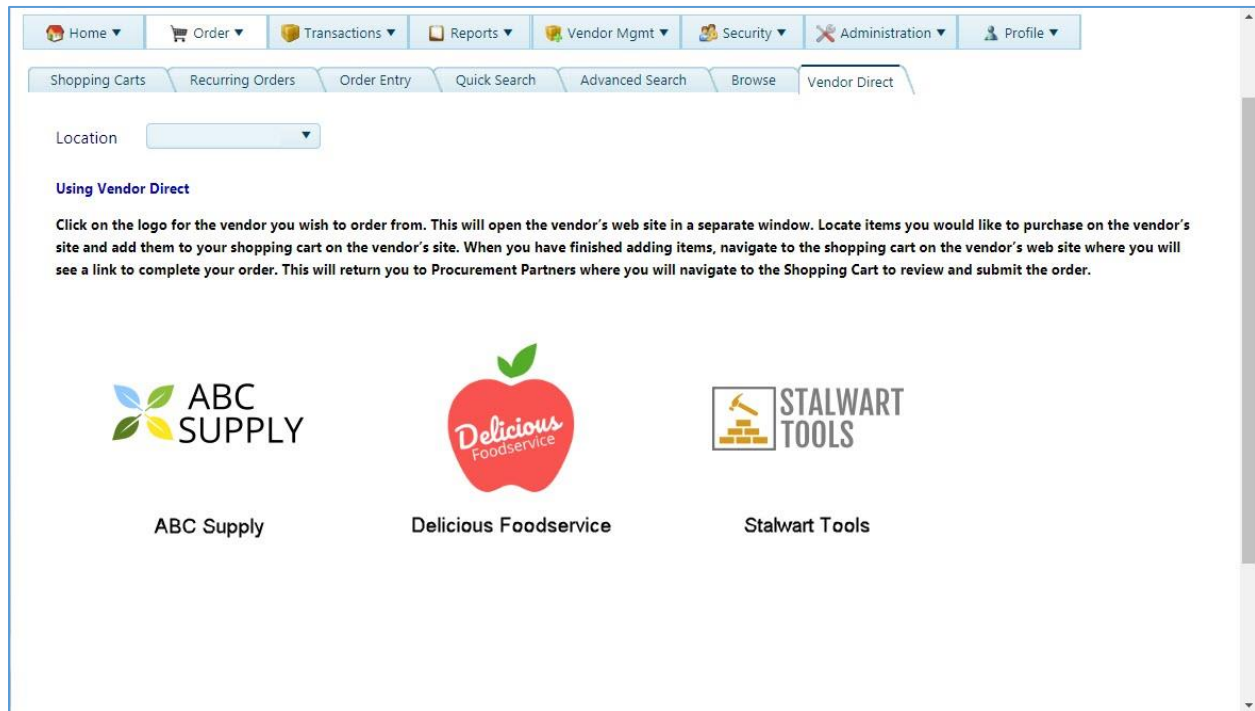
All vendors that you can purchase from using the Procurement Partners system will be classified as either a Vendor Direct vendor or a Hosted Catalog vendor. This section details how to access the **Vendor Direct** catalogs in particular. If you cannot see or access a vendor catalog that you believe you should have access to in the Vendor Direct tab, check the Hosted Catalogs tab (detailed later in this document). If the vendor catalogs do not appear there either, check with your corporate team.

To see your available Vendor Direct vendors, click the **Order** tab, then select **Vendor Direct**. To access a vendor's catalog, simply click the vendor's logo on the Vendor Direct page. This will open up a new window or tab that will contain the vendor's unique catalog website.

*IMPORTANT NOTE: Some web browsers may block your Vendor Direct window from opening with its built in pop-up blocker. You will generally receive a message stating that a pop-up was blocked. To bypass this pop-up blocker, click the prompt and select the option "Always allow pop-ups from procurementpartners.com" or "Trust procurementpartners.com". This method will vary by browser. If you need assistance, contact your local IT department, or check out the video titled **How to Allow Pop-Ups for Vendor Direct** located on the **Training and Documentation Hub**.*

At this point you can use the vendor's specially designed website to construct your shopping cart. If you would like specialized documentation that goes into more detail on your specific vendors, please reach out to the Procurement Partners Help Desk at helpdesk@procurementpartners.com.

Once you finish checking out your shopping cart on your Vendor Direct site, you will receive a blue-colored screen with the message:

> To complete your order, close this window and navigate to the Shopping Cart where you can review your order and submit it to the vendor.
>
> [Close Window]

Your order has now been transferred to the Procurement Partners system and is ready to be finalized. Click Close Window and navigate back to the Procurement Partners webpage.

> **NOTE**: If you do not complete the following steps, your shopping cart **WILL NOT** be received by the vendor. Please ensure you complete ALL steps listed here.

Click on the Shopping Carts tab, either under the Order tab or by using the tabs that appear across the top of your Order screen (both will take you to the Shopping Carts screen). At this point, locate your shopping cart associated to your location and vendor, and proceed with the checkout process. For more information on finalizing your shopping cart, check out the Shopping Carts section of this document.
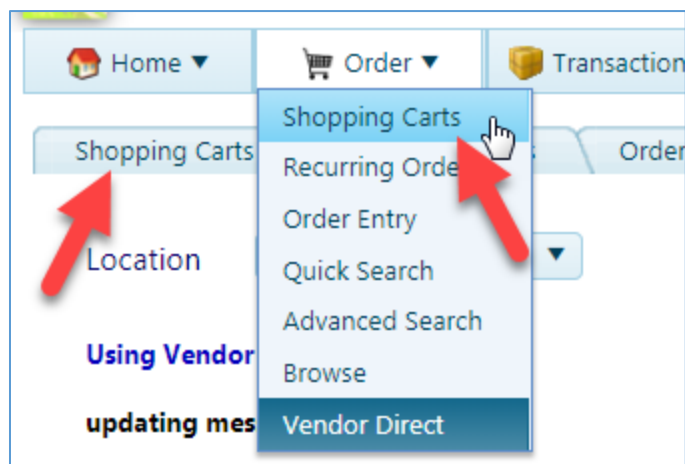
Hosted Catalogs

All vendors that you can purchase from using the Procurement Partners system will be classified as either a Vendor Direct vendor or a Hosted Catalog vendor. This section details how to access the **Hosted Catalogs** in particular. Hosted Catalogs are broken up into three sections: **Browse**, **Search** (in both Quick Search and Advanced Search), and **Order Entry**. Which of these options you choose to utilize is up to you; each has their own strengths and specific circumstances where they will prove advantageous.

Browse
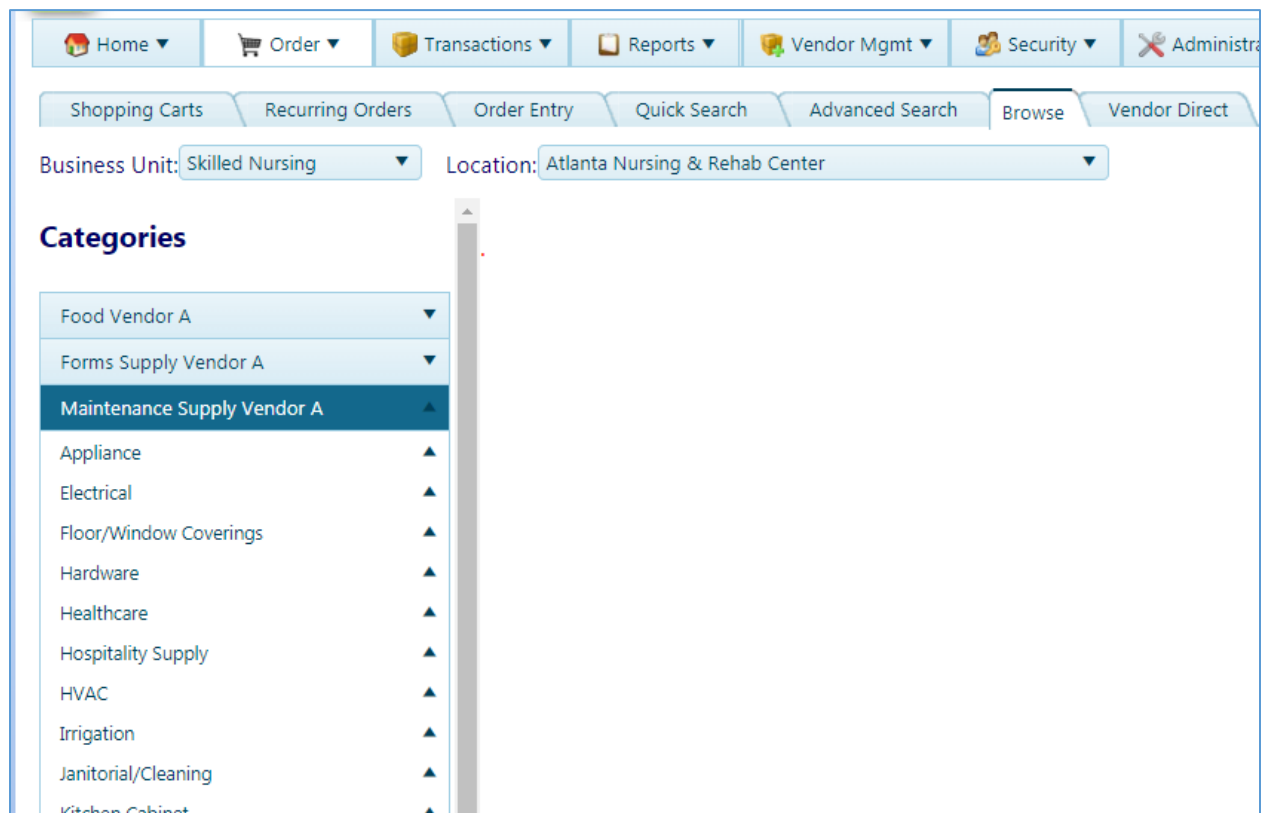
The **Browse** tab allows you to shop through a vendor's catalog based on categories that the vendor has established. Selecting a vendor will load a list of categories underneath that vendor; clicking on a *category* will show all items within that category. You may also be able to drill down into *subcategories* to further narrow your results.

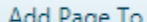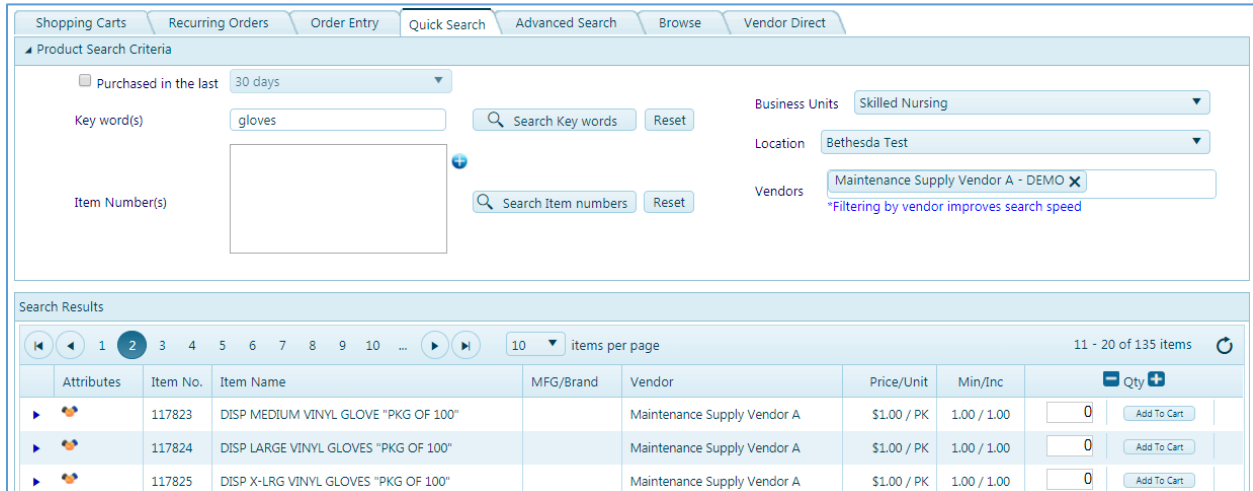|	Attributes	Item No.	Item Name	MFG/Brand	Vendor	Price/Unit	Min/Inc	Qty
▶		127360	WHIRLPOOL AUTOMATIC ICEMAKER KIT	Whirlpool	Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		150305	WASHING MACHINE FILTER WASHER"PKG OF 10"		Maintenance Supply Vendor A	$1.00 / PK	1.00 / 1.00	0 Add To Cart
▶		154550	DUAL SCALE REFRIGERATOR THERMOMETER		Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		154555	DUAL SCALE STICK-ON THERMOMETER	JOHNSTONE SUPPLY CO	Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		154565	-20 TO 80 DEG REFRIG/FREEZER THERMOMETER	ERP	Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		154595	+100 TO 600 DEG OVEN THERMOMETER		Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		192167	DRYER THERMOSTAT 180 D OPEN 160 D CLOSE	ERP	Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		192169	DRYER THERMOSTAT 240 D OPEN 200 D CLOSE	ERP	Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		197004	GAS DRYER IGNITER		Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart
▶		197016	GE Washer Lid Switch		Maintenance Supply Vendor A	$1.00 / EA	1.00 / 1.00	0 Add To Cart

1 - 10 of 758 items

Add Page To Shopping Cart

The catalog view will display all information for the products in your catalog. You can **sort** the results by clicking the header of each column. You can find some additional details by clicking the **arrow** to the left of each item – an image of the product and a description may be available based on what the vendor offers. The **Attributes** column will also give some additional information about your products; for more information about attributes, check out the *Procurement Partners Quick Guide – Item Attributes* document located on the **Training and Documentation Hub**.

The default display will show 10 items per page; you can increase this to 25 or 50 items per page by selecting the relevant option in the **items per page** dropdown at the bottom of the item list. You can also navigate through the various pages of results with the arrow and page number icons in the bottom left of the catalog view.

To add items to your shopping cart, enter the quantity necessary into the Quantity column, then click the Add Page To **Shopping Cart** button. You can also add products to existing Recurring Orders by choosing the appropriate selection from the Shopping Cart drop down; for more information regarding this functionality, check out the Recurring Orders section of this document.

Search
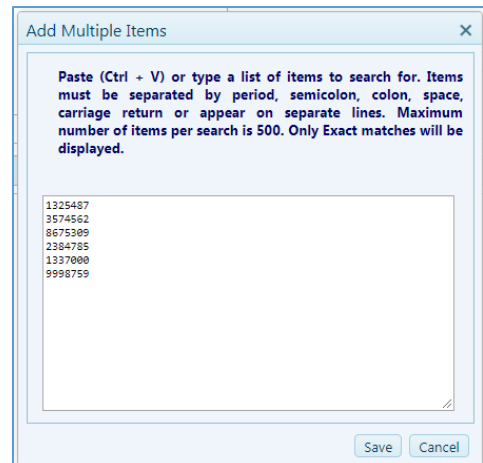
The **Search** tabs allow you to search for key words or item numbers within a vendor's catalog. This is broken into two separate tabs: **Quick Search** and **Advanced Search**. The Quick Search tab offers a faster, more streamlined method of searching through product catalogs. The Advanced Search tab offers some additional tools that can prove useful to higher end users such as system administrators. This section will focus primarily on the Quick Search tab.

Before searching through a product catalog, it's a good idea to choose your vendor in the **Vendor** drop down. You can select more than one vendor if you'd like to compare prices for similar or identical items across more than one vendor catalog, but making at least one choice will improve your search speed.

You can search for one or more key words in the **Key Word(s)** blank. Make sure there are no spelling errors in the words or phrases you type. If you have too few results, think of synonyms or related terms to enter instead; if you have too many results, be more precise with your search terms or try entering more than one word to search for only those results (for example, instead of searching for "*gloves*", you could search for "*powderfree latex gloves*").

You can also search by item number in the **Item Number(s)** blank. You can search for one item number at a time, or you can copy and paste in a list of up to 500 item numbers at a time.
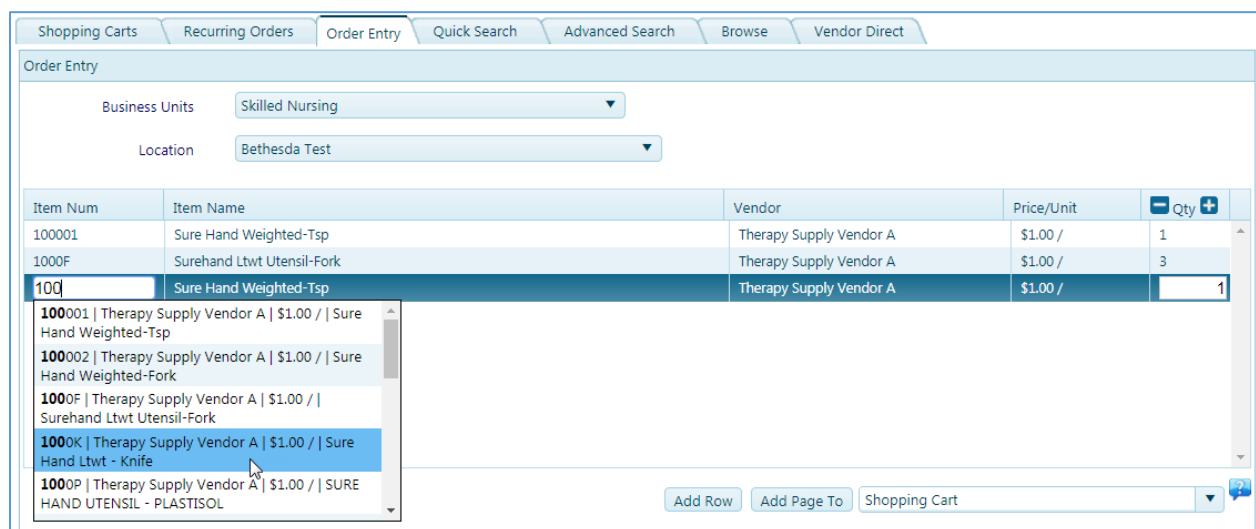
Finally, you can narrow down your search criteria by using the "**Purchased in the last**" checkbox. This allows you to narrow your search criteria to only items that you or others from your location have purchased in the past *30* to *120* days so you can remain consistent with your purchases.

> **NOTE**: The "Purchased in the last checkbox" will only see purchases that you have made through Procurement Partners, not purchases made prior to your go-live.

The search results will appear in a display identical to the catalog view found in the Browse tab; for more information, refer to the **Catalog View** section under Browse**.**

Order Entry

The **Order Entry** tab allows you to quickly and easily key in item numbers and quantities to construct an order. If you know the item numbers and quantities of all the items that you need to purchase, this tab can save you time with putting your shopping cart together. Simply enter the appropriate item number ensure the item is correct, enter the quantity, then click the Add Row button. Once you've entered all the items you wish to purchase, click the Add Page To **Shopping Cart** button.

Recurring Orders

The **Recurring Orders** tab allows you to manage your saved shopping carts in Procurement Partners. If you wish to have a saved list of frequently purchased products from your Hosted Catalogs, the Recurring Orders tab will be able to do everything you need and more.

> **NOTE**: Recurring Orders are designed to work in tandem with your **Hosted Catalogs**. If you shop with any Vendor Direct catalogs you can continue to use their built-in list functionality as it is provided through their Vendor Direct site.

There are two ways to create a recurring order. The first is to save a copy of an existing shopping cart. On the Shopping Carts tab, select a shopping cart you've previously created. In the bottom right corner, click the Save As button. You can enter a name for your new recurring list here, or select an existing recurring order to consolidate the items into that recurring order.

You can also create a new Recurring Order by navigating to the Browse, Search or Order Entry tab of your choice and locating the first few items you'd like to add to your new list. You'll notice the field to the right of the [Add Page To] button is a *writeable* field – here, you can clear out the text that says "Shopping Cart" and type in the name you'd like to give your new recurring cart.

[Add Page To] | Cold Medicine Monthly ▼

We suggest giving your recurring order a unique, easily identifiable name that makes sense to you!
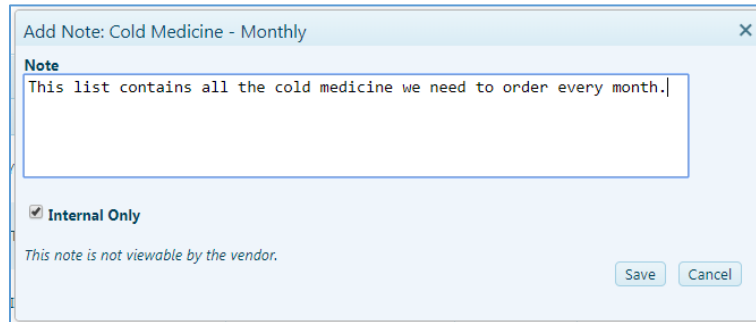
When you've entered a name you like, click the [Add Page To] button to create your new recurring order. This new recurring order will also now appear in the dropdown located by clicking the down arrow next to the [Add Page To] **Shopping Cart** button; to add more items to your existing recurring order, simply select the recurring order name from the dropdown list when choosing new items to add, then click the [Add Page To] button.

In the Recurring Orders tab, you can find all the recurring orders you've created. Click on a recurring order to bring up its contents below. You can modify the quantity of items in your recurring order by increasing or decreasing the quantity; click the [Update] button to save your changes. In addition, if you'd like to remove an item from your recurring order, change the quantity to 0 then click the [Update] button.

You can print a copy of your recurring order by clicking the **Print Recurring Order** (🖹) icon. This will download a printable .pdf document to your computer that contains the contents of your recurring order as well as a "Qty in Stock" and "Qty to Order" column; it can be used as a convenient inventory sheet!
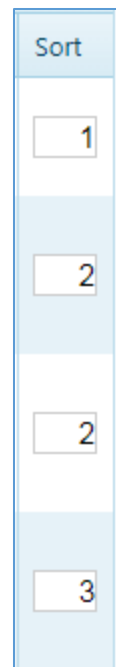
Recurring Order

Sort Num	Item Num	Item Description	Pack Size	UM Code	Price Per Unit	Catch Weight	QTY	Total	Preferred	Formulary	Price Type	Notes	Qty in Stock	Qty to Order
	OTC386575	NASAL SPRAY,45 ML/EA,OCEAN S	1.0000	EA	$1.0000		3.000 0	$3.0000	No	Yes	Guaranteed Price			
	OTC502198	SORE THROAT LOZENGES,18/BX,C	1.0000	EA	$1.0000		4.000 0	$4.0000	No	Yes	Guaranteed Price			
	OTC66016	TUSSIN DM LIQUID,16 OZ/BT <R	1.0000	BO	$1.0000		3.000 0	$3.0000	No	Yes	Guaranteed Price			
	OTC79101	ANTACID CHEW TAB,80MG,100/BT	1.0000	EA	$1.0000		2.000 0	$2.0000	No	Yes	Guaranteed Price			
	OTC79316	TUSSIN LIQUID,16 OZ/BT <ROBI	1.0000	BO	$1.0000		2.000 0	$2.0000	No	Yes	Guaranteed Price			
	OTCS0378C2	PINK BISMUTH LIQUID,8 OZ<PEPT	1.0000	BO	$1.0000		3.000 0	$3.0000	No	Yes	Guaranteed Price			

You can add notes to your recurring order or to an item on your order by clicking the **Add Note** ( ) icon either at the top of your list or next to the particular item respectively.

You can create your own sorting method by entering a rank or priority number into the **Sort** column. All items start with 0 in this field; you can enter any number you like from 0 to 999 in the field to group your items however you like. Be sure to click the Update button after entering your desired sorting numbers. After entering grouping numbers into the Sort column, you can easily display these results together by clicking the top of the column to arrange your results based on the entries in this field.

Example: *Jenny has a recurring order for their dietary products with their Food Vendor hosted catalog. She wants to group her items based on where she keeps them in the kitchen: dry goods, refrigerated, frozen and chemicals. She can give each of these groups any number she likes, but she decides to keep it simple by making dry goods **group 1**, refrigerated **group 2**, frozen **group 3**, and chemicals **group 4**. She enters the appropriate number in the Sort column for each item that belongs in its corresponding group, then clicks the Update button. Her items are now able to be sorted and grouped together easily!*

When you are ready to add your items to your shopping cart, you can click the Add To Cart button next to a particular item, or you can click Add Page To **Shopping Cart** at the bottom of your recurring order to add the entire recurring order to your shopping cart.

Shopping Carts

The **Shopping Carts** tab is where all your products will await final checkout. On the Home screen, a Quick Link will show how many open, unsubmitted shopping carts you have; you can click on this link to access your carts, or select **Shopping Carts** under the **Order** tab.

To begin checking out a shopping cart, click on the shopping cart for your location and vendor that you wish to view. The details of the shopping cart will appear below.
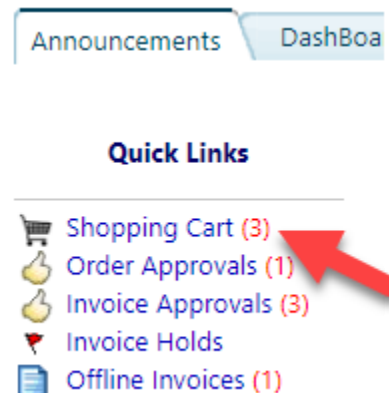
You can modify the quantity of items in your shopping cart by increasing or decreasing the quantity; click the Update button to save your changes. In addition, if you'd like to remove an item from your shopping cart, change the quantity to 0 then click the Update button.

You can also update the GL code for your products at this time. Most products will have a default GL code assigned to them – if you'd like to choose another GL code, click the drop down in the GL code column and choose the appropriate GL. Make sure to click the Update button to save your changes to the GL code before moving on or else your changes will revert back.

| GL Code |
| 400-200-0000 - Supplies Billable |
| 400-300-0000 - Maintenance Minor Equipment |
| 400-400-0000 - Maintenance Supplies |
| 400-200-0000 - Supplies Billable |
| 400-500-0000 - Supplies Non-Billable |
| 999-000-0000 - Capital |

NOTE: If you cannot find the GL code you need to select in your drop-down list or if you feel that the default GL code for a product you purchase frequently is incorrect, check with your corporate team.
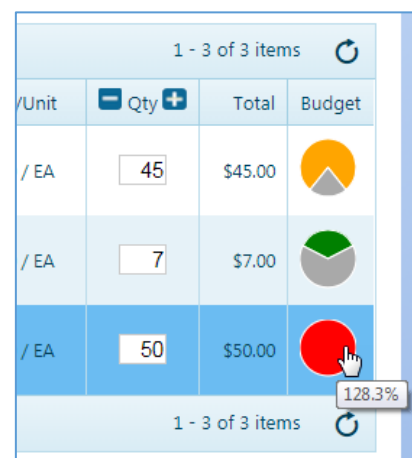
You may also have the ability to split GL codes by using the **Split GL Editing** ( ) icon. For more information about utilizing this tool, check out the *Procurement Partners User Guide – Split GL Editing* document located on the **Training and Documentation Hub**.

You can add notes to your shopping cart or to an item in your cart by clicking the **Add Note** ( ) icon either at the top of your list or next to the particular item respectively. Notes are typically only for internal usage; however, some vendors may allow you to attach a note that they can view by unchecking the **Internal Only** check box.

If your organization utilizes the Procurement Partners Budgets tool, you will see the **Budget** pie chart to the right of your shopping cart items. For more information regarding this feature, check out the *Procurement Partners User Guide – Budgets* document located on the **Training and Documentation Hub**.

When you are ready to proceed with your order, click the Checkout button. This will take you to the order finalization screen.
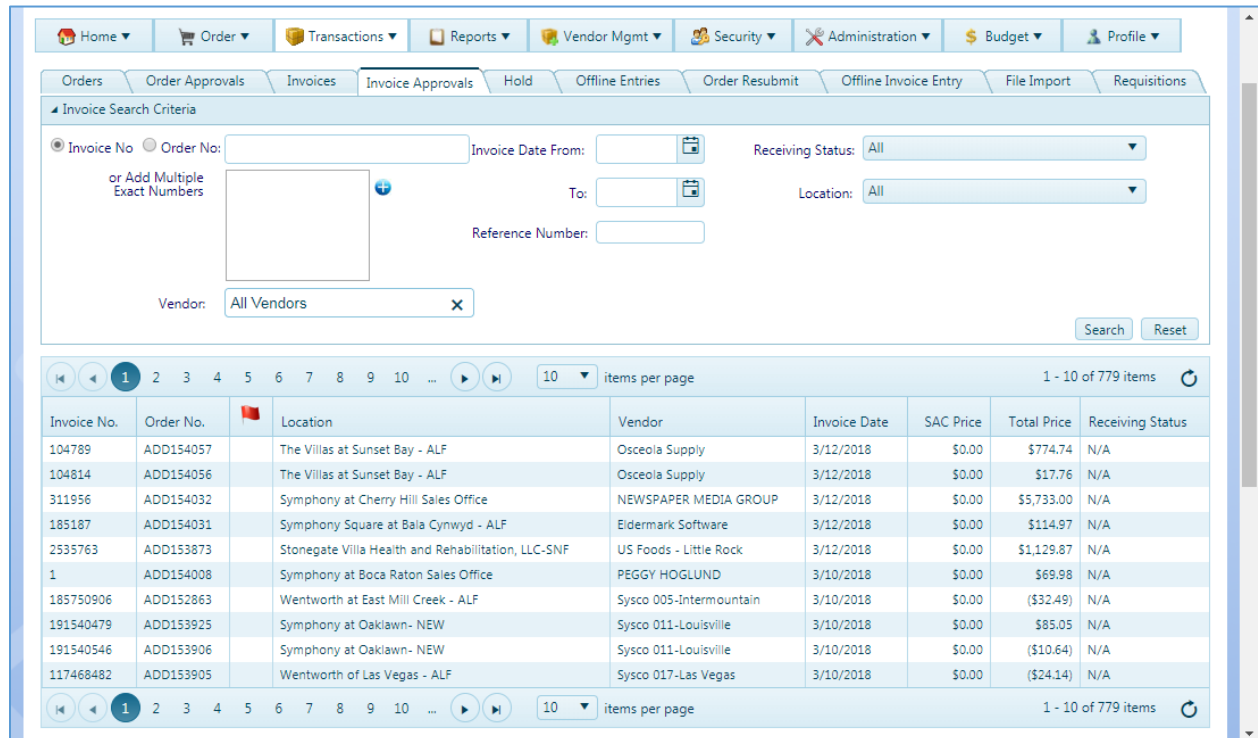
15

◢ Order Verification

☑ * Freight charges may be applied for orders less than $100.00.
You have met the minimum order requirement. The minimum order charge should be waived.
Please click the "Place Order" button below to proceed with this order. Otherwise click the "Cancel" button to return to your shopping carts.

◢ This Order Requires Approval

1. Manager - Approval Required by PCU Support, Administrator or SuperAdmin .
   1. Product 156255, 156594, 156596, 156622 and 156642 are Non Formulary item

Vendor Account Number: DEMO-t1 - DEMO-t1   Future Order Date: 3/29/2019

Location: Bethesda Test   Vendor: Maintenance Supply Vendor A   Total Cost $80.00

Item Num	Action.	Product	GL Code	Price/Unit	Total	▬ Qty ➕	Budget
156255	✂	25' INCANDESCENT WORK LIGHT	400-300-0000 - Maintenance Minor Equipment	$1.00 / EA	$15.00	15	
156594	✂	Energizer 3 AAAA LED Inspection Penlight	400-300-0000 - Maintenance Minor Equipment	$1.00 / EA	$5.00	5	
156596	✂	Energizer LED Hardcase Area Light	400-300-0000 - Maintenance Minor Equipment	$1.00 / EA	$10.00	10	
156622	✂	Maglite Rechargeable LED Flashlight	400-300-0000 - Maintenance Minor Equipment	$1.00 / EA	$20.00	20	
156642	✂	Energizer 2 D Safety Flashlight	400-300-0000 - Maintenance Minor Equipment ▼	$1.00 / EA	$30.00	30	

Update Place Order GL Sum Cancel

There are a few things to note on this screen. The **Order Verification** box will let you know any messages from your vendor, including messages regarding minimum order requirements, freight charges or other details. If your organization utilizes budgets, you may also see a checkbox that must be acknowledged if your order will be putting you over budget. Any messages that appear in **red** must be either corrected before proceeding or, if available, acknowledged by checking the check box to the left of the detail; until you click this checkbox, the [Place Order] button will be greyed out.

◢ Order Verification

☐ * Freight charges may be applied for orders less than $100.00.

➡ Update Place Order GL Sum

◢ Order Verification

☑ * Freight charges may be applied for orders less than $100.00.

➡ Update Place Order GL Sum

The **Order Approval** box will inform you whether your order will require any approval before being submitted to the vendor. If your order requires approval, a message will appear in **red** informing you of why the order requires approval and who will be responsible for approving it. You don't need to do anything special if your order requires approval; simply click the [Place Order] button to proceed with your order – our system will automatically notify any approval personnel and they will be able to approve the order by signing into the Procurement Partners system.

Invoice Approvals

> **NOTE**: This section is a brief overview of the Invoice Approval process that covers basic, buyer-level approvals. For more detailed instructions, check out the **Invoice Approval** guide on the ***Training and Documentation Hub***.

There are two methods by which you can locate your **Invoice Approvals**. On the Home screen, there is a link on the left side called Invoice Approvals with a red number to the right of the link – this number indicates how many invoices currently await your attention. Click this link to view the invoices that you are responsible for approving.

You can also navigate to the ***Transactions*** tab, then select ***Invoice Approvals***. This screen will show only invoices that are awaiting your approval; if the list is empty, there are no invoices that await your attention at this time.

When you select an invoice awaiting approval, the details for the invoice will appear below the list. At the top of the section you will see a list of approvers, with those who have already approved the invoice or who do not need to approve the invoice listed in blue and those who have yet to approve listed in red.

Depending on your job role, your responsibility will typically be to ensure that all items on the invoice were received, and that the quantity and price of these items is accurate. If you notice any discrepancies with these fields, you will need to reach out to the **vendor** to resolve.

If you would like to change the GL code for a specific item, click the GL code and select the desired code. After any changes are made to these fields, click the Update button to save the changes.

To approve the invoice and move it along to the next step of the approval process, or to your AP system if yours is the final step of the approval process, click the Approve button.

If you require any additional assistance, please contact the Procurement Partners support team at helpdesk@procurementpartners.com

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