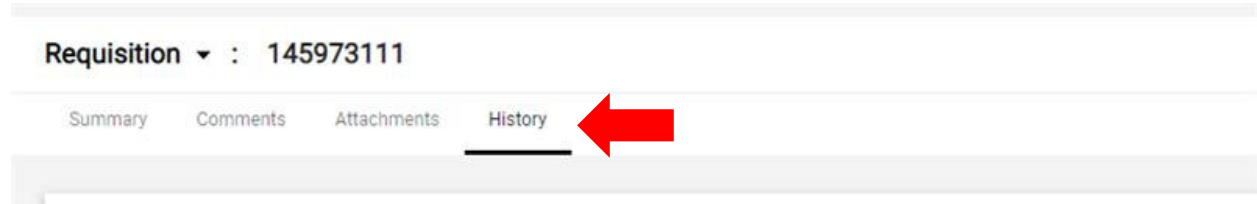


## buyW&M Reminders

### ePRO/Shopping Reminders

#### Check Budget Fail Notification Troubleshooting

If you receive notification that your requisition failed the budget check, first check the history tab of the requisition to see what the error message says.



Many times it may be due to the index needing an activity code which you can add to the allocation string – the activity code is typically the same as in the index and the error message will confirm.

If it is due to a vendor failure or anything else, please submit a [buyW&M help desk ticket](#).

#### Blanket Orders vs. Traditional Purchase Orders

If you are setting up purchase orders where:

- The goods or services are reoccurring purchases.
- There will be multiple payments issued against the purchase order.
- The order involves variable dollar amounts and/or quantities.
- The goods or services on an order may change over time.
- The maximum order amount may need to be adjusted over time.
- The order has specific start and end dates.

You will need to use the blanket purchase order function to allow you to issue multiple invoices where invoice amounts vary based on volume, etc. Please refer to [these instructions](#)

#### ESI invoices

Please continue to use the SPCC to pay for the copy usage until procurement and ESI are able to meet to provide campus guidance on setting up those orders. Please Do Not use the direct pay check request function to issue as these payments are for services and require a purchase order. Please refer to the [procure-to-pay matrix](#) for when to purchase orders are needed.

#### Index Approver Updates

While we are working to automate the index approver updates from Finops to buyW&M, this process is not in place. Please know that we are working on making those updates, but this is still a manual process.

#### Vendor Email Address for Registration Updates

Please submit a [buyW&M help desk ticket](#) for vendor email updates to resend registrations.

## buyW&M Reminders

### EVA PO Invoice

You will be able to use the eVA PO invoice payment option for 6 months – or until 1/31/2022 so if the order is for longer, please create a new PO in buyW&M. The eVA PO invoice process is being tested and finalized now. We will provide guidance on how to proceed later this week.

### Vendor Onboarding - New Contact Email Address

When searching for the status of a vendor in buyW&M, if you determine that they were not invited with the right contact email address, please provide the proper contact information in a [buyW&M help desk ticket](#).

### Trouble Accessing Punchouts

Some of the punchout catalogs only populate via a pop-up window, a feature that is prevented by most web browsers for security and protection. When using buyW&M you may have to edit these security settings to allow you to access the punch out catalog in question. This brief guide will walk you through how to add and allow only specific pop-up windows from buyW&M and still be protected while browsing the web.

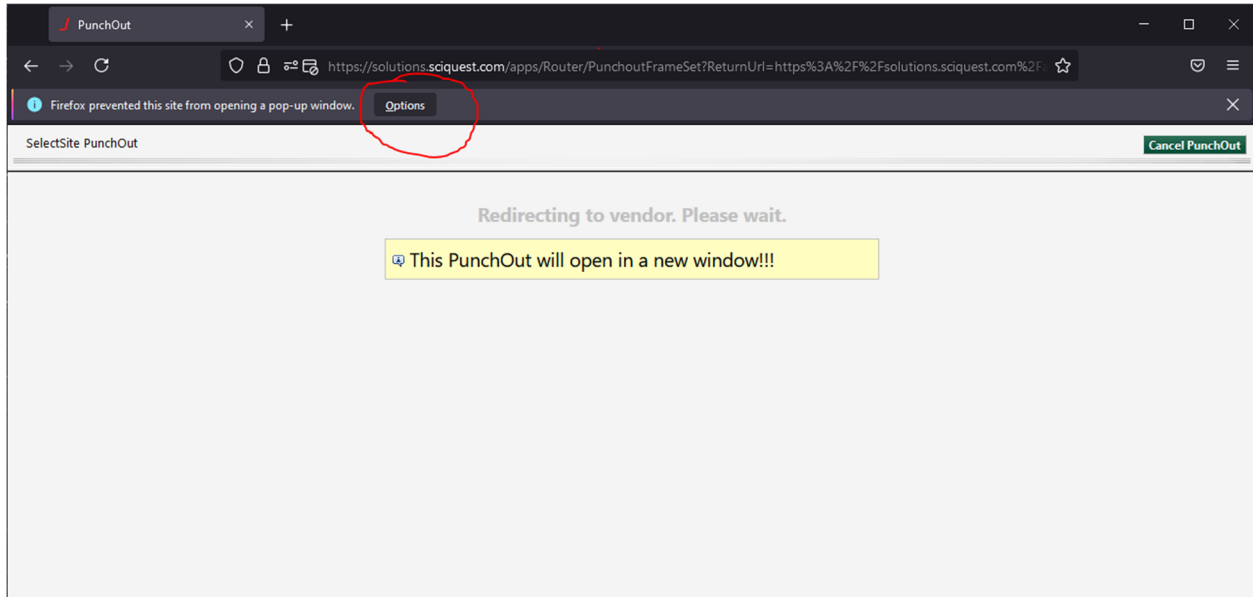
Note: Because of the nature of individual browsers, we have only provided instruction for Firefox, Chrome, and Safari, but the process should be the same or similar for others too.

## Firefox

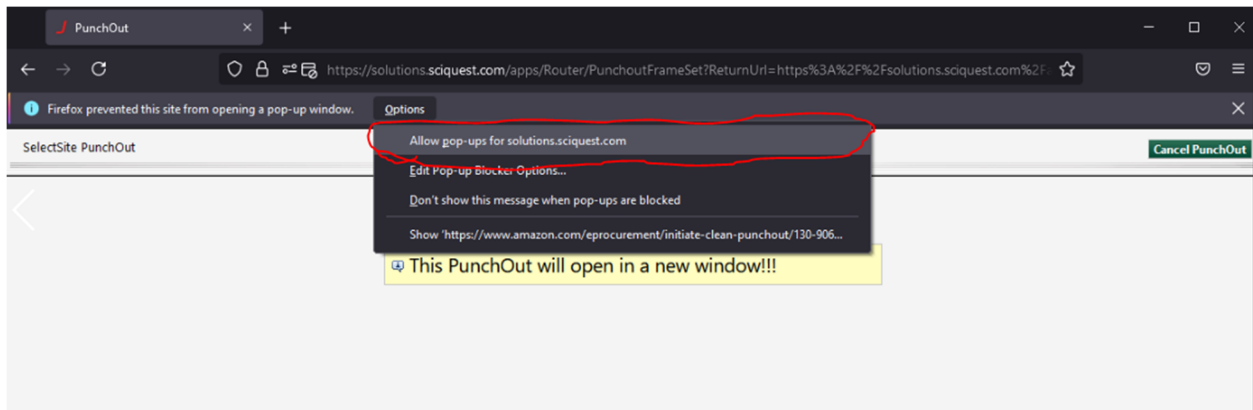
The screenshot shows the 'Shopping Dashboard' for William & Mary's buyW&M system. The browser address bar shows the URL: <https://solutions.sciquest.com/apps/Router/ShoppingDashboardUserDetails?tmstp=1625816315185>. The page header includes the William & Mary logo and 'BUYW&M'. The main content area is titled 'Shopping Dashboard' and features a search bar with the placeholder text 'Search for products, vendors, forms, part number, etc.'. Below the search bar, there is an 'Organization Message' section with a welcome message and a link to a helpdesk submission page. To the right, there is a 'Showcases' section titled 'Punchout Catalogs' which displays a grid of vendor logos. The logos include Amazon, DELL, FERGUSON, Fisher Scientific, Connection, GraybaR, shi, SUPPLY SOURCE COMPANIES, VWR, and GRAINGER. The Amazon logo is circled in red.

## buyW&M Reminders

Using Firefox, on the shopping dashboard, click the punch out you'd like to use. For this example, we know that amazon is a punchout catalog that requires a pop-up window for access.

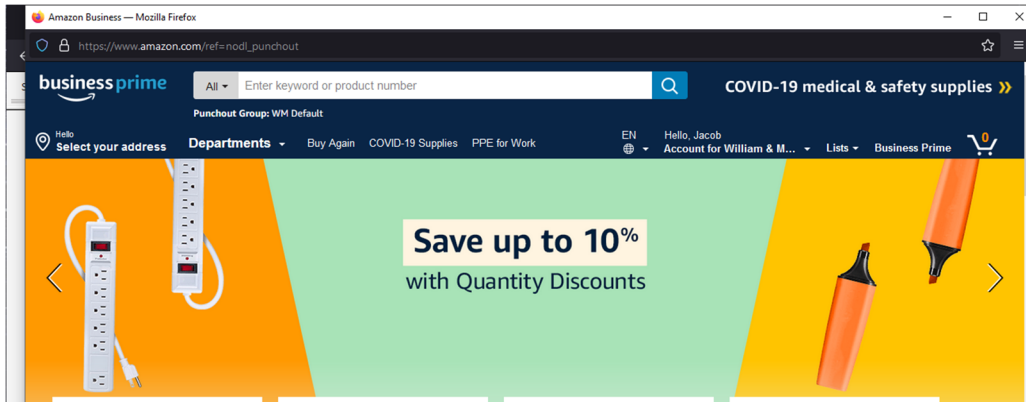


After clicking the Amazon Tile, you should see this screen, where firefox has notified you that it has successfully prevented a pop-up window from opening. Click the options button (circled in red).



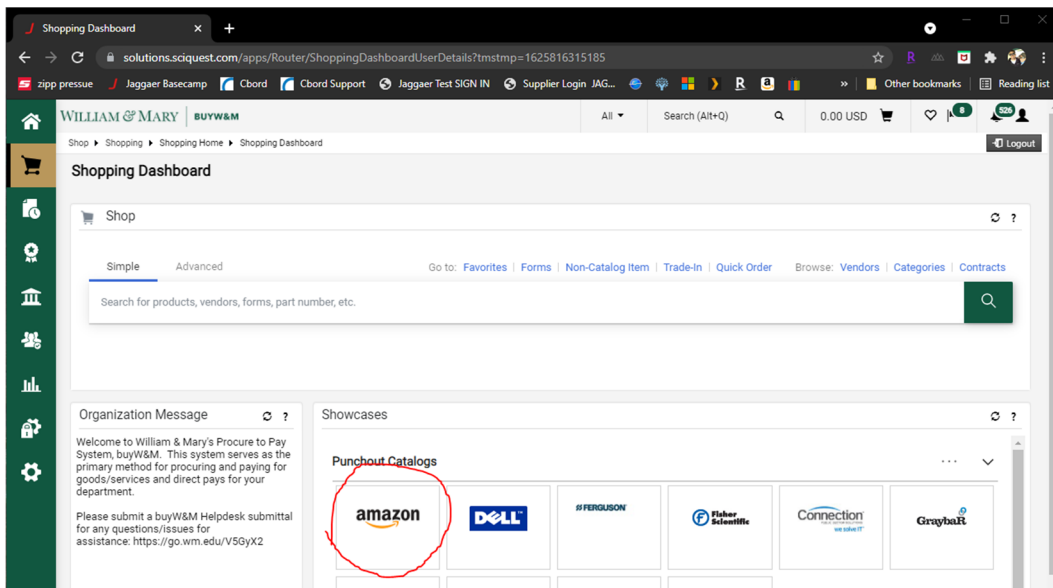
From the option drop-down, select All pop-ups from solutions.sciquest.com (BuyW&M). This lets firefox know that it should continue blocking pop-ups to keep your web browsing secure and private, but to allow pop-ups from our trusted site.

## buyW&M Reminders

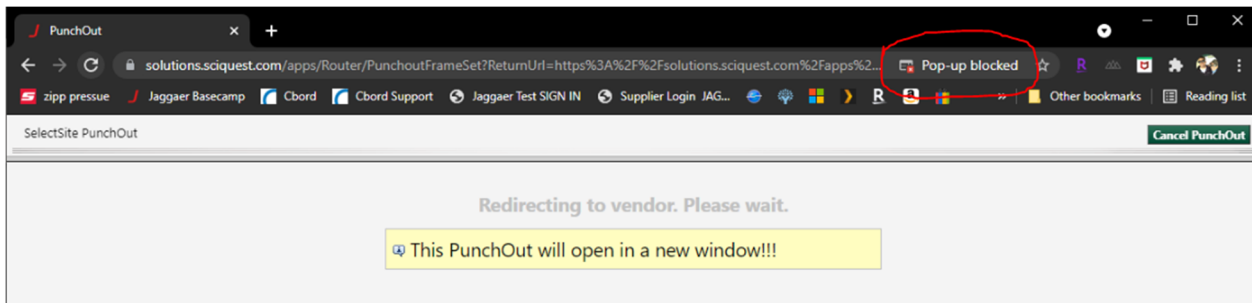


You should now see the amazon punch-out catalog. Once this setting has been changed, all punch-out catalogs within buyW&M should behave normally within Firefox.

## Chrome

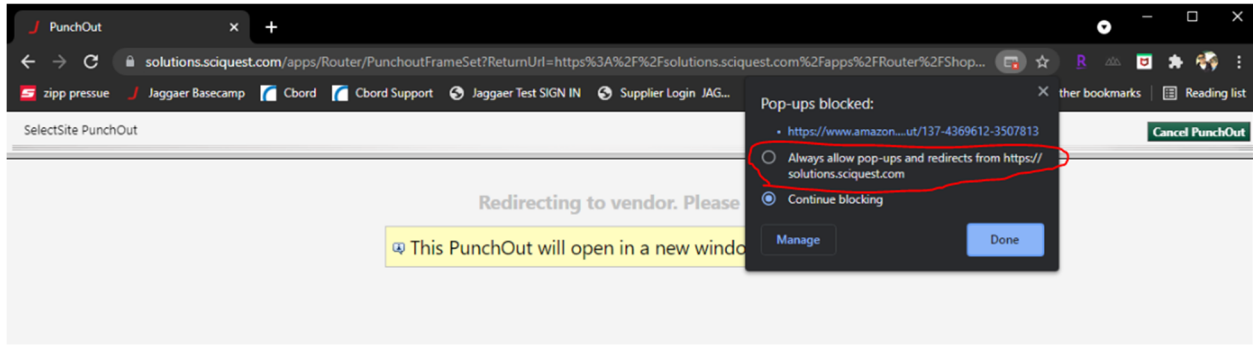


Using Chrome, on the shopping dashboard, click the punch out you'd like to use. For this example, we know that amazon is a punchout catalog that requires a pop-up window for access.



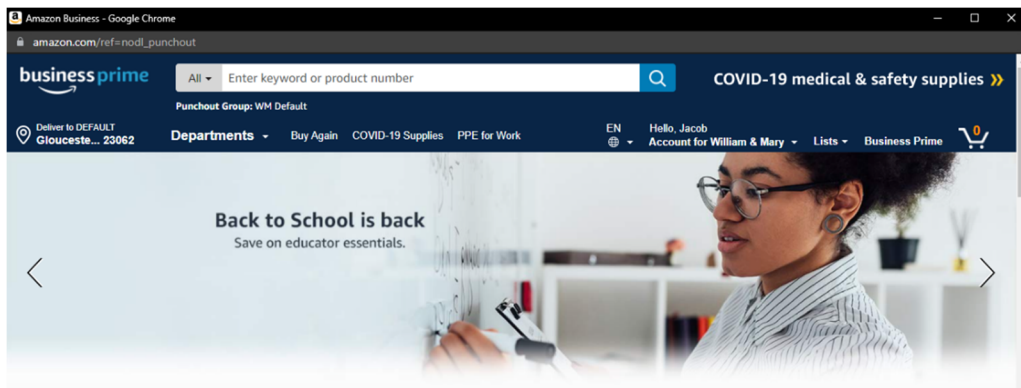
## buyW&M Reminders

After clicking the Amazon Tile, you should see this screen, where Chrome has notified you that it has successfully prevented a pop-up window from opening. Click this notification (circled in red).



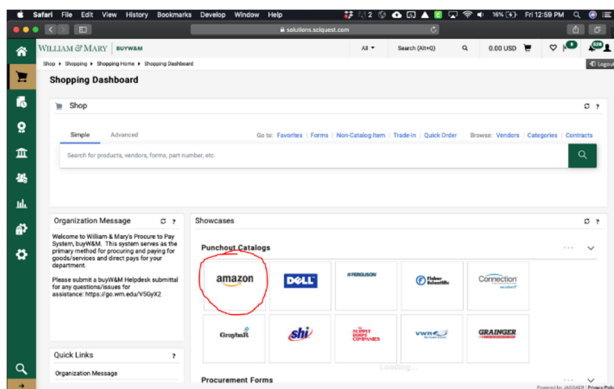
From the notification drop-down, select Always allow pop-ups and redirects from https://solutions.scquest.com (BuyW&M). This lets chrome know that it should continue blocking pop-ups to keep your web browsing secure and private, but to allow pop-ups from our trusted site.

Once complete, select done. Then refresh your webpage.



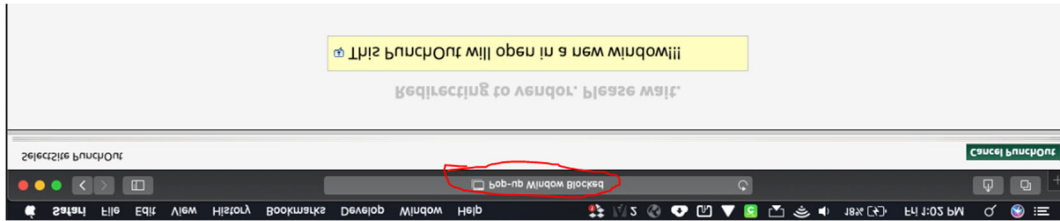
You should now see the amazon punch-out catalog. Once this setting has been changed, all punch-out catalogs within buyW&M should behave normally within Chrome.

## Safari (MAC)



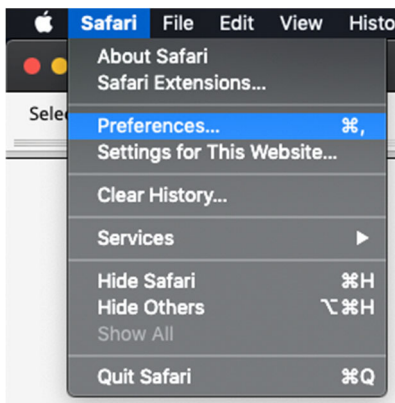
## buyW&M Reminders

Using Safari, on the shopping dashboard, click the punch out you'd like to use. For this example, we know that amazon is a punchout catalog that requires a pop-up window for access.

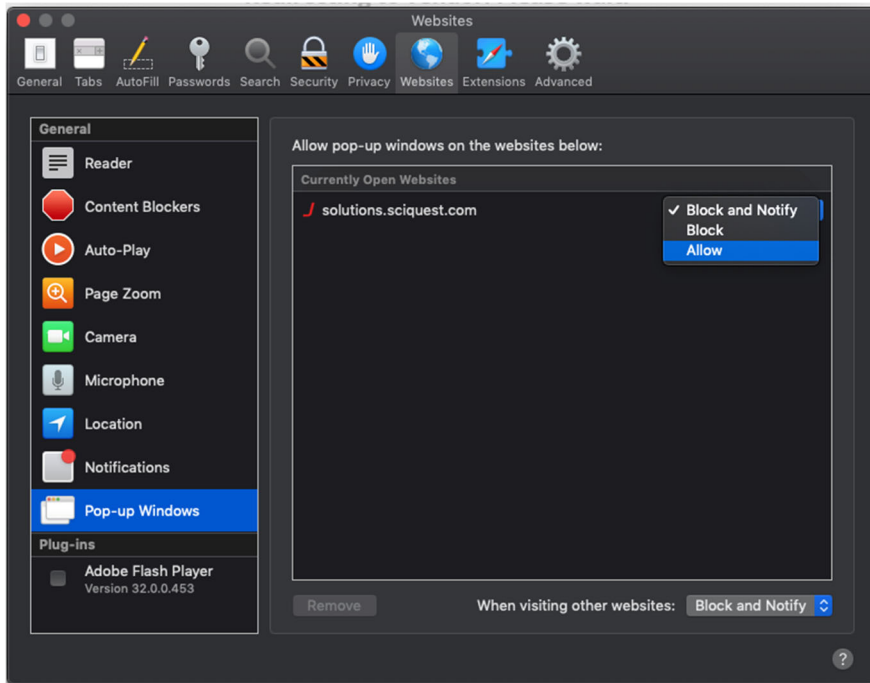


After clicking the Amazon Tile, you should see this screen, where Safari has notified you that it has successfully prevented a pop-up window from opening (circled in red).

To continue, you will need to edit your website settings within Safari's preferences.



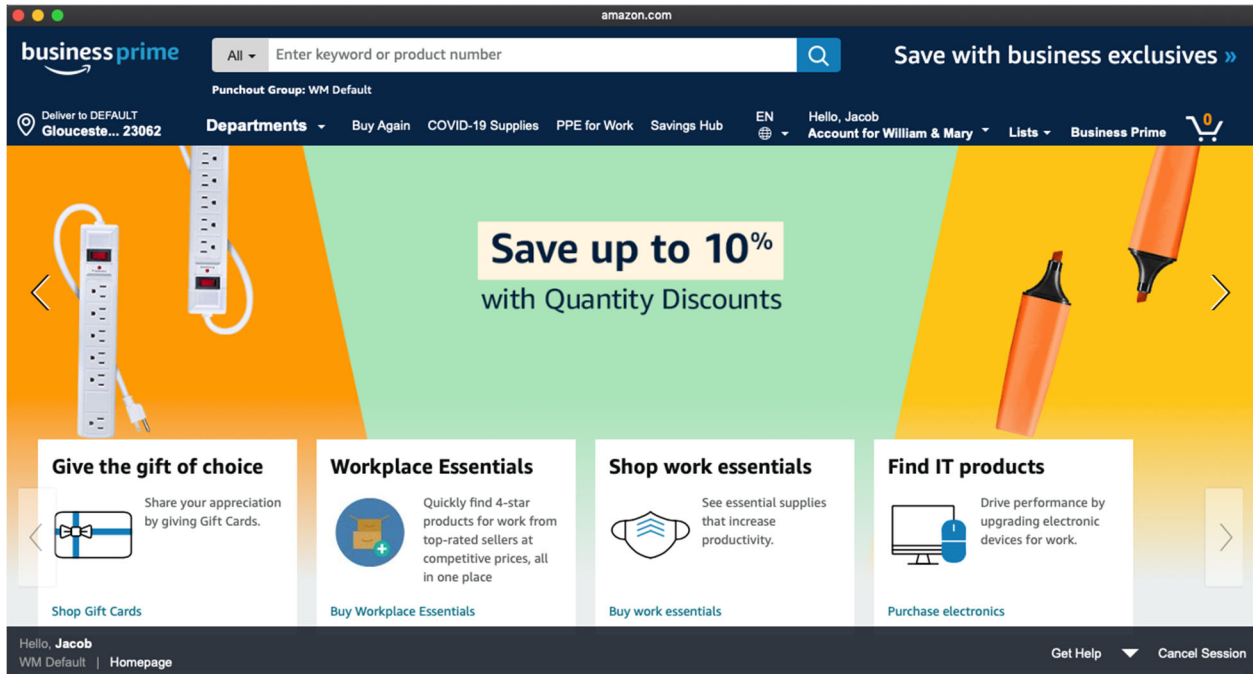
Click on "Safari" in the top left corner. In the Drop down select preferences.



## buyW&M Reminders

Once at the preferences screen, make sure you are on the websites tab (top) and have highlighted the Pop-Up Windows settings (left). Within the window, you will select solutions.sciquestion.com (BuyW&M) and select “Allow.”

Once complete, close the preferences screen and refresh your webpage.

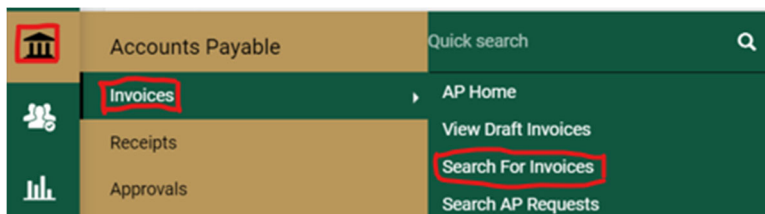


You should now see the amazon punch-out catalog. Once this setting has been changed, all punch-out catalogs within buyW&M should behave normally within Safari.

## Invoice Reminders

### How to check the status of an invoice

Under the AP fly-out select “Invoices” and then “Search For Invoices”



Search for the invoice using the Quick Filters located on the left panel or use the Quick Search feature at the top. There are various search fields. For example you can search by vendor name, PO invoice or non-PO Invoice, name of the person who submitted the invoice etc. Once you find the invoice you are looking for, click on the invoice number to view.

# buyW&M Reminders

WILLIAM & MARY BUYW&M

Accounts Payable > Invoices > Search For Invoices

Search Invoices

Quick Filters My Searches

Created Date: Last 90 days Quick search

Page 1 of 12 1-20 of 222 Results

Invoice Number	Vendor Invoice Number(s)	Vendor	PO Number	Invoice Status	Created Date/Time	Due Date	Amount	Currency	Invoice Type	Invoice Source
INV-0000234	9955929980	W.W. Grainger, Inc.	Z0000302	Pending	7/9/2021 4:03:16 PM	7/24/2021			Form Request	Manual
INV-0000292	13DX-61KH-FLWR	Amazon Capital Services Inc.	Z0000255	Pending	7/9/2021 3:54:22 PM	8/8/2021	0.00 USD		Form Request	Vendor Portal
INV-0000293	PSI1090336	Daly Computers Inc.	Z0000143	Pending	7/9/2021 3:52:56 PM	7/24/2021			Form Request	Manual
INV-0000291	GEN1314381	Colonial Athletic Association Football	Z0000392	Complete	7/9/2021 2:38:35 PM	7/24/2021			Form Request	Manual
INV-0000290	1GHC-964P-FC44	Amazon Capital Services Inc.	Z0000323	Pending	7/9/2021 2:38:17 PM	8/8/2021	0.00 USD		Form Request	Vendor Portal
INV-0000288	IN1831075	Electronic Systems Inc.	-	Pending	7/9/2021 1:44:42 PM	6/2/2021	0.00 USD		Form Request	Vendor Portal
INV-0000284	712445351	Dominion Energy Virginia	-	Pending	7/9/2021 1:08:12 PM	7/9/2021	0.00 USD		Form Request	Vendor Portal
INV-0000283	0027604859-6/21	Dominion Energy Virginia	-	Complete	7/9/2021 1:03:49 PM	7/30/2021	0.00 USD		Form Request	Vendor Portal
INV-0000282	498116	Hackworth Reprographics Inc.	-	Complete	7/9/2021 12:57:11 PM	6/29/2021	0.00 USD		Form Request	Vendor Portal
INV-0000280	I129AF LAISHRAM	Department of Homeland Security	-	Complete	7/9/2021 12:35:37 PM	7/10/2021	0.00 USD		Form Request	Vendor Portal

Identifiers

- Contract Number
- Invoice Batch Number(s)
- Invoice Master Number
- Invoice Name
- Invoice Number(s)
- PO Number
- Vendor Account Number(s)
- Vendor Invoice Number(s)

Dates

- Accounting Date

On the invoice screen there is a panel on the right-hand side that lists the invoice status (pending, complete, rejected). Scroll down until you see the workflow steps. This will show you where the invoice is in the process. You can also view the history tab additional information such as export errors.

Invoice : INV-0000242

Summary Matching Vendor Messages Comments 1 Attachments 1 History

The invoice contains one or more non-PO invoice lines. They are excluded from the matching.

General	Addresses	Note/Attachments						
<p>Invoice Type: Invoice</p> <p>Play Status: In Process</p> <p>Invoice Number: INV-0000242</p> <p>Invoice Date: 7/1/2021</p> <p>Vendor Name: Dominion Energy Virginia</p> <p>Vendor No.: 930327854</p> <p>Invoice Owner: Sharon Widdows</p> <p>Vendor Invoice No.: 350397501</p> <p>Due Date: 7/24/2021</p> <p>Terms: NET23 (Net 23)</p> <p>Terms Discount: 0.00 USD</p> <p>Invoice Name: Direct Payment Request Form</p> <p>Retainage: no value</p> <p>*FOREIGN VENDORS ONLY* Is Payment US Source or Foreign Source Income?: no value</p> <p>Do you need the check held for pickup (this...): no value</p>	<p>Remit To</p> <p>PO Box 26543 Richmond, Virginia 23290-0001</p> <p>United States Address Id RM-2</p> <p>Bill To</p> <p>no address</p>	<p>External Note: no value</p> <p>Internal Note: no value</p> <p>External Attachments: Add</p> <p>Internal Attachments</p> <table border="1"> <thead> <tr> <th>Invoice</th> <th>Date</th> <th>Add</th> </tr> </thead> <tbody> <tr> <td>Invoice</td> <td>7/8/2021</td> <td>...</td> </tr> </tbody> </table>	Invoice	Date	Add	Invoice	7/8/2021	...
Invoice	Date	Add						
Invoice	7/8/2021	...						
<p>Payment Information</p> <p>Accounting Date: 7/8/2021</p> <p>F.O.B.: Destination</p>	<p>Discount, Tax, Shipping &amp; Handling</p> <p>Discount, tax, shipping &amp; handling</p> <p>Allocation: Weighted</p>							

What's next?

Switch Step

- Show skipped steps
- Submitted: 7/9/2021 4:03 PM Sharon Widdows
- Invoice Validation: Completed
- Check Request - Index Approval: Active
- Parallel Steps: Click to view

The step that is listed as Active indicates which workflow the invoice is currently sitting. If you click on the workflow step you will be able to also see the list of approvers.



# buyW&M Reminders

**What's next?** ▼

**Workflow** 🖨️

Show skipped steps

**Submitted**  
7/9/2021 4:03 PM  
Sharon Widdows

**Invoice Validation** ...  
Completed

**Check Request - Index Approval** ...  
**Active**

310085-W

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**Nancy Ocasio**  
nastahon@wm.edu  
+1 434-328-1001

**Sharon Widdows**  
sswiddows@wm.edu  
+1 434-328-1002

**Parallel Steps**  
Click to view

**OK to Pay** ...  
Future

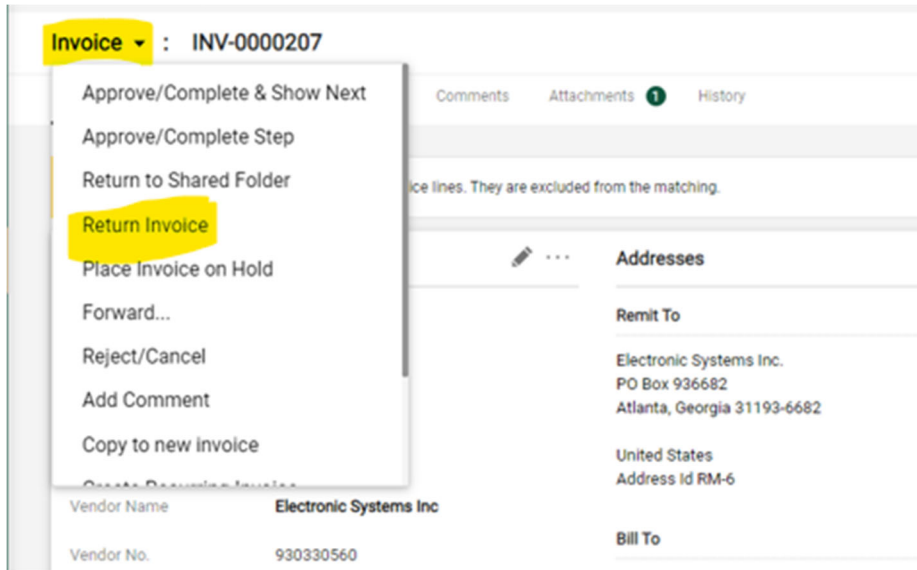
**Auto-Close-PO** ...  
Future

**Finish**  
Future

## buyW&M Reminders

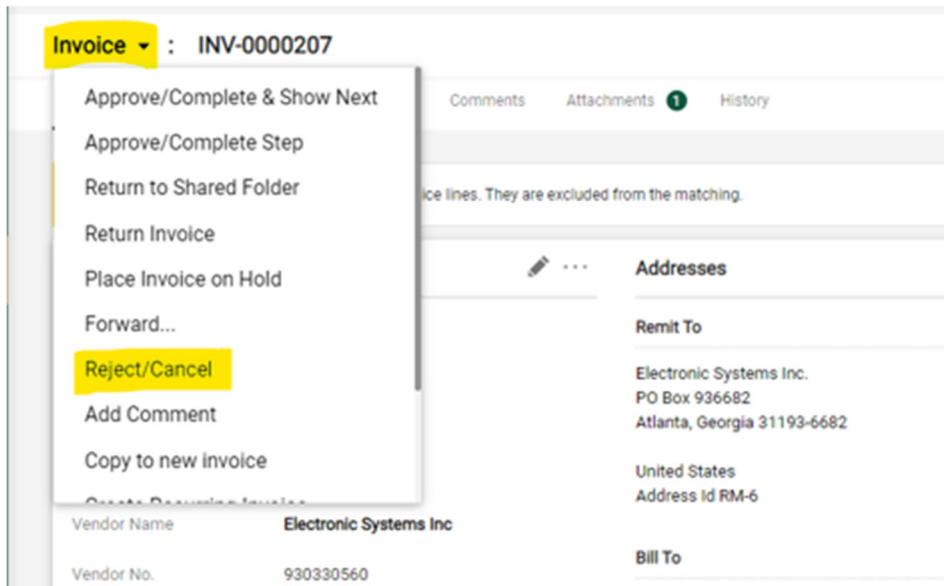
### How to return an invoice for corrections

You must first assign the invoice to yourself. Under the Invoice drop-down section, select Return Invoice and be sure to put a justification as to why the invoice is being returned



### How to Reject/Cancel an invoice

You must first assign the invoice to yourself. Under the Invoice drop-down section, select Reject/Cancel Invoice. Be sure you want to cancel the invoice because the department cannot return the invoice if cancelled.



## buyW&M Reminders

### How to return the invoice to the Shared workflow folder

If you assign an invoice to yourself and wish for someone else who has approval in the workflow to approve or you are leaving for the day or for vacation, you may wish to return the invoice to the shared workflow folder. Under the Invoice drop-down section, select Return to Shared Folder.

The screenshot displays an invoice management interface. At the top left, there is a dropdown menu labeled 'Invoice' with a downward arrow, followed by the invoice number 'INV-0000207'. The dropdown menu is open, showing several options: 'Approve/Complete & Show Next', 'Approve/Complete Step', 'Return to Shared Folder' (highlighted in yellow), 'Return Invoice', 'Place Invoice on Hold', 'Forward...', 'Reject/Cancel', 'Add Comment', and 'Copy to new invoice'. Below the dropdown, the interface shows a table with columns for 'Comments', 'Attachments' (with a notification icon), and 'History'. The main content area is partially obscured by the dropdown menu. On the right side, there is a section titled 'Addresses' with a sub-section 'Remit To' containing the following information: 'Electronic Systems Inc.', 'PO Box 936682', 'Atlanta, Georgia 31193-6682', 'United States', and 'Address Id RM-6'. Below this, there is a 'Bill To' section which is currently empty.

Vendor Name	Electronic Systems Inc
Vendor No.	930330560

**Addresses**

**Remit To**

Electronic Systems Inc.  
PO Box 936682  
Atlanta, Georgia 31193-6682  
United States  
Address Id RM-6

**Bill To**