



SDezBuy Getting Started Guide

ACCESSING THE SYSTEM

1. Go to the **SNAP** portal.
2. Click on the **Finance** tab.
3. Click on the **Purchasing Tools (SDezBuy)** link
4. Enter your User Name and Password and click **LOGIN**.

UPDATING YOUR PROFILE

Your profile contains information about yourself, your default settings, and allows you to change the email notifications you need.

SETTING YOUR PROFILE AND PASSWORD RESET QUESTION

1. Click on your **name** in the User Menu in the top banner.
2. Click on the **View My Profile** link.
3. Click on the **User's Name, Phone Number, Email, etc.** link Report any discrepancy to your purchasing office.
4. Click on the drop-down arrow for **Question** and select a security question.
5. Click on the **Save** button if any changes are made.

ADDING ACCOUNTING AND OTHER CODES TO YOUR PROFILE

Your profile may be loaded with certain pre-set codes used by the Banner budget system and by SDezBuy to route the order to the appropriate approvers. In addition to these "defaults", you may add other codes such as account code (FOAPAL elements) or commodity codes.

1. Click on the **View My Profile** link in your User Menu.
2. Click on the **Custom Field and Accounting Code Defaults** link.
3. Click the **Codes** tab.
4. Click on the **Edit** button to the right of the code you wish to change/add.

Custom Field Name	Default Value	Description	Edit Values
Approver 1	No Default Value		Edit
Approver 2	No Default Value		Edit
Approver 3	No Default Value		Edit
Department Approver	No Default Value		Edit
Buyer Name	USD/Kyra Blatchford		Edit
Buyer Phone	605-677-5667	USD-Kyra	Edit
Buyer Email	kyra.blatchford@usd.edu		Edit

5. Click on **Create New Value** and search by description or a known code.
6. Click on the **Save** button to add it to your profile.

ADDING A NEW SHIP-TO ADDRESS TO YOUR PROFILE

You may add a ship-to address to your profile so that it will be easy to populate your requisition(s). These are set up in Banner by your campus administrator.

1. Click on your **Name** in the User Menu in the top banner.
2. Click on the **View My Profile** link.
3. Click on the **Default Addresses** link.
4. Click the **Select Addresses for Profile** button.
5. Enter address or nickname text, then click on the **Search** button.
6. Click in the **radio button** to select an address or addresses.
7. Click on the **Save** button to add the address to your profile.

UPDATING YOUR PROFILE'S EMAIL PREFERENCES

Your profile was loaded with certain events triggering an automatic email to your email account. You can update the preferences by:

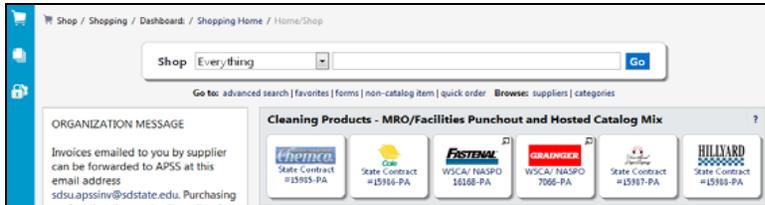
1. Click on the **View My Profile** link in your User Menu.
2. Click on the **User Information and Settings** link, then **Email Preferences**.
3. Select **Email, Email & Notification** or **Notification** only of any email notifications you wish to add or select **None** for those you no longer wish to receive.
4. Click the **Save** button.



SDezBuy Shopping Guide

SHOPPING OVERVIEW

You can shop several different ways in SDezBuy. A hosted catalog search searches numerous catalogs within the system and returns the closest matches from various suppliers. A punchout takes you to an individual supplier's website that is customized for SDBOR and allows you to shop only at that site.



HOSTED CATALOG SEARCH

1. Click on the **homepage icon** at the top of the screen.
2. Enter **keyword(s)** of the item in the open field next to **Shop/Everything**.
3. Click on the **Go** button.

From the results page, you can filter search results, and add an item or multiple items directly to your cart, or compare several items side-by-side.

ADD TO CART

From the search results page, click on the **add favorite | compare** next to the item(s) you wish to add to your cart or to your favorites folder.



COMPARE MULTIPLE ITEMS

1. Click the **compare** link next to the items you wish to compare.
2. Select the **Compare Selected: 2** button at the top of the search results to view a side-by-side comparison of the selected items.
3. If you want to add multiple items to your cart, click the for each item you wish to add, then select **Add To Active Cart** and then **Go**.
4. Alternatively, you can select **Add to Cart** to put an item or items in your cart.
5. Once you have finished comparing items, select **<< Back to Search Results** to go back to the search results.

PUNCHOUT CATALOG SEARCH

Because a punchout connects you directly to a supplier's site, the shopping experience for each punchout is unique. In general, these are the steps for creating a cart from a punchout.

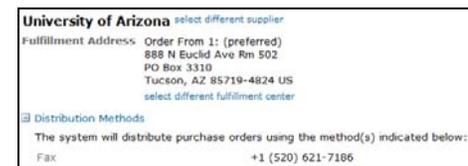
1. Click on the **punchout button** for the supplier you wish to shop. This will take you to the supplier's site that is customized for SDBOR with our contract pricing.
2. Shop on the site like you would any internet catalog and when finished, there will be an **Add to Cart** and **"Checkout"**.
3. Follow the website's instructions for checking out, which will bring the items in the shopping cart back to a SDezBuy Cart.
4. If at any time during your punchout session you decide to stop shopping without anything in your cart, click the **Cancel Punch-out** button on the top right of the screen which will return you to SDezBuy.

NON CATALOG SHOPPING

SDezBuy also allows you to enter items to a cart when the items you need are not available through a punchout or hosted catalog using freeform text. An example of when this function may be used is when you wish to purchase a product that is not covered by a state contract, WSCA or E&I agreement, an item such as a registration for a conference. To enter a non-catalog item you will use the Non-Catalog Item link in SDezBuy.



1. Click on the **homepage icon** at the top of the screen.
2. Click on the **non-catalog item** link under the search bar.
3. Search for the Supplier by entering the supplier name or partial name or by clicking on the **supplier search** link.
4. Click on the **supplier name** in the drop-down list. The supplier's Fulfillment Address and Distribution Method will auto-populate from the supplier profile. Select a different fulfillment center, if necessary.



5. Enter the item in the Product Description, Catalog No. (or na if none), Quantity, unit price in the Price Estimate, Packaging and Unit of Measure from the drop-down. These are all required fields meaning each has to have something in them.
6. Select the **Save and Close** button if this is your only item or select the **Save and Add Another** button if you wish to add additional non-catalog items or select the **Close** button if you wish not to complete an order at this time.



SDezBuy Reviewing and Submitting an Order Guide

CART PREVIEW

Items that you wish to order are initially put into a Cart. The Cart is where you define your products and quantities, ship to address and line items. Once your cart is submitted into workflow, it becomes a requisition or order.

Click on the **cart preview** button on the top right of the screen to access your cart. Each Cart icon will be updated with the dollar total in the cart.

EDIT CART

The first screen you see when clicking is the Active Cart:



On this screen you can update your Cart Name using the Name this cart box. To update the quantity of a particular item, change the value in the field and click . If the items in your cart were selected from a punchout catalog and you wish to adjust the order quantity, you will need to return to the punchout catalog to make this adjustment using the [Modify Items](#) link within the shopping cart.

REVIEW CART by clicking the button.

This will bring you to a page with a series of tabs that will allow you to review your cart prior to submission. It is here where you can edit the ship to address, delivery date and FOB, buyer information, accounting codes, commodity codes, quote/contract number and commodity code prior to submitting your cart to Banner.

SHIP TO ADDRESS AT CHECKOUT

The Ship To address is a required field on all carts. To update the Ship To address:

1. Click on the **shipping** tab or click on Shipping in the progress bar at the top.
2. Click on the button to the right of "Ship To".
3. Enter Contact Name, contact phone and contact email address similar to this example, select one of your profile addresses, or enter a nickname in the search to find a new address not in your profile.
4. Click on the button to use the address for your order.

Current shipping address example

Edit current shipping address...
Fields in **bold** are required for checkout.

Contact Name	<input type="text" value="Bryan Bisson"/>
Phone	<input type="text" value="1-605-6885148-"/>
Email	<input type="text" value="bryan.bisson@sdstate.edu"/>
Address Line 1	<input type="text" value="South Dakota State University"/>
Address Line 2	<input type="text" value="Residential Life"/>
Address Line 4	<input type="text" value="Caldwell"/>
Address Line 5	<input type="text" value="Room 176"/>
City	<input type="text" value="Brookings"/>
State	<input type="text" value="SD"/>
Zip Code	<input type="text" value="57007-3399"/>
Country	<input type="text" value="United States"/>

Save this address for future use
Name this address (e.g. Main St)

 Check this box to make this the default address in the future.

5. Verify the information is correct and click on .

EDITING DELIVERY OPTIONS

Add Delivery date and FOB field because they are required on the purchase requisition.

1. Click on the button to the right of Delivery Options.
2. Type the **delivery date** with format mm/dd/yyyy in the field.
3. An **FOB** will default from your profile. To change the FOB for the order, click on Select from profile values or Select from all values, whichever is appropriate.
4. Click on the **Save** button to save your changes.

ATTACHING DOCUMENTS

Specifications, forms, quotes and drawings may be attached to a given requisition.

1. Click on the **add attachment...** link in the Internal Notes and Attachments section of the PR.
2. Click on the .
3. Double-click on the document file name to allow it to appear in the browse field.
4. Click on the **Save** button

EDITING THE QUOTE/CONTRACT NUMBER FIELD

Quotations and contracts generally have a number. The punchout or hosted catalog button has a contract number noted which can be copied into this field on the requisition.

1. Click on the button to the right of **Quote/Contract** number.
2. Type the quote or contract number in the open field. If the quote is an emailed quote, enter Quote by John Smith 9/18/2012. If no quote, type "na".
3. Click on the **Save** button.

PLACE ORDER

When all the required fields have been completed and you have verified that the item and quantity is correct, click the button at the top right of the screen to submit your order for approval. The system will provide you with a PR number for you to track the progress of the order through the approval process.



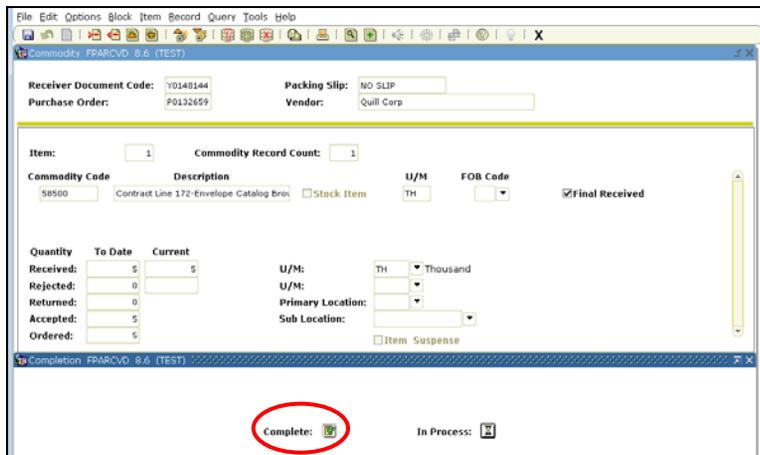
Banner Receiving and Document History Guide

RECEIVING COMPLETE ORDERS

1. Access the **Banner General Menu** from the Snap portal, Finance tab.



2. On the General Menu screen type **FPARCVD** in the Go To... field. Hit enter.
2. Type **NEXT** in the Receiver Document Code field.
3. Click on the **Next Block** button.
4. Enter the **packing slip number** (if none, type NO SLIP) then click on **Next Block**.
5. Enter the **Purchase Order number**. Then hit the **Tab** key.
6. Click on **Options** in the menu bar.
7. Select the **Receive All** Purchase Order Items from the drop-down menu.
8. Click on **Next Block**. This will take you to the Commodity screen.
9. For a regular purchase order, tab to the **Current** Quantity Received field and enter the **quantity** of goods received for this item if not already populated.
10. Tab to the **U/M** field. U/M will default in the field.
11. Repeat steps 8 & 9 for all items using the keyboard down arrow to change line items.
12. Click on **Options** in the menu bar and select **Access Completion**.
13. Click the **Complete** button.

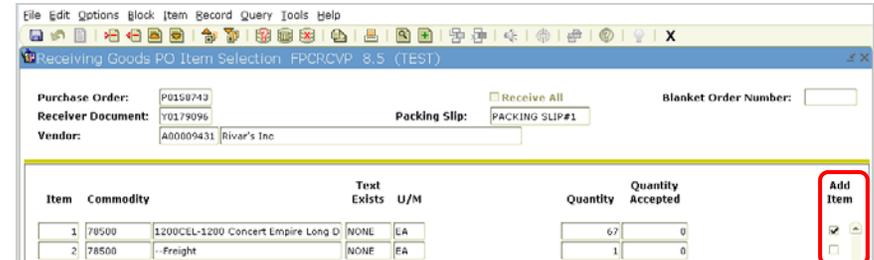


14. Next, click the **Exit X** icon to exit the screen.

RECEIVING PARTIAL ORDERS

Perform steps 1-5 from above.

6. Click on **Select Purchase Order Items** from the drop-down menu.
7. Double click in the **Add Item** check box for each of the item(s) that are being received.

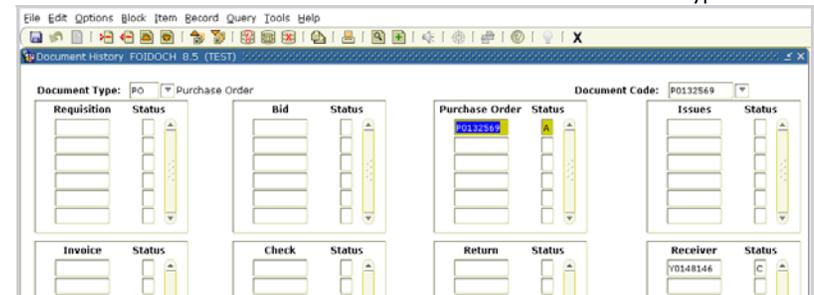


8. Click on **Save**.
9. Click on the **Exit** icon. Click on **Yes** to close the form.
10. Click on **Next Block**.
11. On the Commodity screen, tab through until you get to the Current Quantity Received field. Type the **Quantity** received.
12. Tab to the **U/M** field. U/M will default from the PO. Tab to the Item field and down arrow to the next item.
13. Repeat steps 11 & 12 for all items using the keyboard down arrow to change lines.
14. Click on **Options** in the menu bar and select **Access Completion**.
15. Click the **Complete** button.

DOCUMENT HISTORY

The FOIDoch form in Banner displays the processing history of PO and payment documents.

1. On the General Menu screen type **FOIDoch** in the Go To... field. Hit enter.
2. Type PO in the Document Type box, then tab.
3. Type the PO number in the Document Code box (ex. P0132569), next block.
4. FOIDoch reveals the purchase order, receiving document(s), invoices and checks associated with this PO and status indicators for each document type.



More detailed information and instructions can be found in the **Purchasing Handbooks** available on SDezBuy.