

Clemson University Athletic Department
Purchasing Policy

DETAILED INSTRUCTIONS FOR COMPLETION OF ELECTRONIC PURCHASE REQUISITION AND BUYWAYS ARE ATTACHED TO THIS POLICY.

PURCHASING

Purchase Requisitions

All expenditures, regardless of the method of payment, must have a completed and signed purchase requisition **before** the transaction occurs. The purchase requisition must be signed by the requestor and then forwarded to the appropriate supervisor for approval.

“No PO, No Payment”

Per University policy, all purchases not made with a p-card **will require a Purchase Order (PO) prior to the purchase being made.** There will be ONLY a few exceptions to this policy. The exceptions are listed below:

Exceptions (Can still process direct payments without PO):

Medical vendors
US Bank (jet fuel)
Coca Cola
Verizon Wireless
Local Restaurants (for official visits, team meals, etc.)
Officials
Bank of America (per diem cards)
Federal Express & UPS
Barnes and Noble (for textbooks)
Campus Copy Shop (for student materials ONLY)
Universities (for game tickets)
Hotels
Campus Banner (on campus)
Utilities
United States Post Office
Dues, memberships, registrations

Issuing PO:

Unless using a PCard or an exception above, **all purchases, regardless of cost, will require a Purchase Order (PO) prior to the purchase being made.** Complete the electronic purchase requisition with all required signatures. You will then go into buyWays to create your requisition per the attached instructions. Once the Business Office has processed your requisition, a PO will then be issued and sent to you and the vendor. The vendor will be instructed via the PO to send their invoice electronically.

Processing Payment:

After the purchase, the vendor should send their invoices to central campus per the PO instructions. The Business Office will receive these electronically from campus. You will receive an email from the Business Office requesting verification that the invoice is okay to pay. Once we receive your email verification, we will process the invoice for payment. This process is for all invoices tied to a PO, including campus groups such as Ricoh Printing and Aramark.

For items that are direct billed (exceptions above) and do not have a PO, invoices should be signed and forwarded to the accounting office for payment along with the electronic approved purchase req. Signing the invoice indicates all items or services have been received and payment is authorized.

Searching for/checking payment status of an invoice:

1. Log in to Clemson buyWays
2. Type the invoice number into the search (Alt+Q) box located in the top right of the page
3. Click the magnifying glass image to search
4. Quick search will appear, click on the correct invoice to see details.

For other searches such as by supplier utilize the traditional search feature by:

1. Clicking on the paper & clock (3rd icon down) on the left task bar
2. Hover over “search” and click “Invoices”.
3. Click “Supplier: All” for example, type the supplier into the search box, then “Apply”.

Tip: You may want to set defaults to make searching easier in the future by clicking “Add Filter” then adding items like, “Supplier”, “Supplier Invoice Number”, “Invoice Number”, and/or “Dept*”. To save these as defaults click the down arrow located to the right of “Save As” located just to the right of “Search Invoices” towards the top of the page. Then click “Pin Filters” and “Yes”. To adjust the details seen in the transaction list below click the blue gear logo on the right side of the screen right above the transactions. Once in a preferred order, click “Pin Columns as my defaults” then “Apply”

Click on the invoice number to open the invoice and see all details within including payment information. If the invoice has been paid, it will show the date it was paid, whether it was paid or is close (payable), how it was paid, and the EFT/Check #.

PCards

See separate PCard Policies and Guidelines file

Multiple Bids

Items or orders over \$1,500 should sent for bid by at least three vendors. These bids can range from informal email requests to formal Requests for Proposals (RFPs). Please consult with the Business Office to determine the proper bid process.

Sole Source

In those instances where purchases of an item can be made through only one source (not just one manufacturer), the specification of “sole source” should be written on the purchase requisition form.

IT and Capital Equipment

If the purchase requested is for IT equipment, supplies, or capital equipment, the purchase requisition must also be approved by Graham Neff.

Team Equipment

Order requests for team related equipment, supplies and uniforms are to be coordinated through the Equipment Room. The purchase requisition must also be signed and approved by the Equipment Room prior to entering order in buyWays.

COMPLETION OF TEAMWORKS PURCHASE REQUISITION (FULL INSTRUCTIONS WITH EXAMPLES ON CUAD WEBSITE)

*The example is using a purchase requisition that requires compliance authorization, but the process is similar for all purchase requisitions and travel authorizations.

1. Go to <https://www.teamworks.com/>, then click on FORMS.
2. Click on Perpetual and you will see a list of several forms. *Please note you must select the appropriate purchase requisition/travel authorization based upon purchase/travel type.
3. Click on Purchase Requisition – Compliance Signature
4. The system requires you to choose all signers (i.e., sports supervisor, equipment signer, etc.) unless routing has been predetermined based on form type. In this case, the form will automatically route to Compliance for signature so only the Sports Supervisor/AD signer needs to be selected. Click on select users and a list will appear based upon your specific sport/department.
5. Click on the arrow and a list of names will appear, double click on the name to add as the signer, click save, then continue.
6. Teamworks now sends you to the purchase requisition. Complete the purchase requisition form and then click sign. Items in red are mandatory. Updates to the form are:
 - a. Form automatically calculates sales tax and total cost so you must type in quantity and unit cost.
 - b. Department Number, Expenditure Category and Project Grant now have drop down lists so you can easily select the appropriate number. If you have a special project not listed, select type number and a pop-up box will appear to the right that allows you to type in a number.
7. Type in your name, initials then click select style, then adopt and sign.
8. Click finish and it will route to the next approver.

Once completed by all signers, the form is automatically saved in the “My Completed” folder in Forms. The form can then be downloaded to your computer and saved under a different name.

BUYWAYS REQUISITION

1. Log in to buyWays using your Clemson ID and password. [Link](#)
2. Go to HOME on the left side of the page.
3. Choose "I Need to Buy Something".
4. Type in your vendor name.
5. Complete the information on the screen, item, quantity, price, etc. ***DO NOT ADD TAX, IT IS AUTOMATICALLY ADDED.**
6. If multiple lines, select "add to cart and return". When last line is entered, click save and close. This will put the items in your cart. **ADD FREIGHT AS A SEPARATE LINE.**
7. Towards the bottom of the page, select "add attachments" under the Internal Attachments button. Attach your completed purchase requisition and any other documentation.
8. Click the cart in upper right hand corner. You should see the dollar amount by the cart icon.
9. Click "view my cart". Click "assign cart to requisitioner". Click/approve Sharon Littlejohn.
10. You will receive a "cart assigned" screen and a requisition number.
11. Once the Business Office has reviewed and processed your requisition, a Purchase Order will be sent to the vendor and to you.
12. To search for the Purchase Order in buyWays, go to the Home Page and in the upper right-hand corner, there is a search block. You can type in the PO number. Be sure to click in the search block and make sure "Purchase Order" is the highlighted document in the drop-down box.

INVOICE APPROVALS

For most invoices under \$2,500, buyWays will "auto-pay" unless there is an issue. If you have a Purchase Order for under \$2,500 and there is a problem with the goods received, go to the Purchase Order in buyWays and click the "comment" tab. Click "add comment", click "add email recipient", type in "McWilliams" (this is Tracy) and click "select" when her name pops up. Type a message regarding the problem with the order in the box and then click "add comment" and Tracy will receive an email and hold the invoice.

*Please send all invoices electronically rather than via paper.

For invoices that do not auto-pay, we will send you an email with the invoices attached asking if they are okay to pay. Email back and tell us if the invoices are okay to pay or if there is a reason not to pay. Once we receive your approval, we will process payment.

THIS DOES NOT APPLY TO P-CARD PURCHASES OR ON THESE CAMPUS ENTITIES:

Housing
Campus Banner
FMO

Municipal Services
Redfern Health Center
Sullivan Center
Outdoor Lab
Risk Management
Parking Services
Campus Recreation

Continue to process these requisitions and invoices as you currently do.

Blanket Purchase Order- On the purchase requisition and in buyWays, list a “not to exceed” amount. Just upload purchase req and complete buyWays form per above instructions.

Increase in Purchase Order- On the purchase requisition, list “increase PO’ and the amount. Once the purchase req has been approved, log into buyWays. In the upper right corner, there is a “search” box. Click in this box and choose “Purchase Order”. Type in the existing PO number and hit return. When the PO pops up, go to the “comments” tab. In the box, type the message that you need to increase the PO. Under the comment box, there is a place to add your purchase requisition. Make sure you have checked the name of someone in the Business Office in the email notification section above the comment box.

When typing in a vendor name in buyWays and it does not locate the vendor, that vendor is not registered. You will need to get the vendor registered prior to completing the ordering process.

VENDOR REGISTRATION PROCESS

1. From the home page of buyWays, go to “suppliers” on the left-hand side of the page.
2. Click on “supplier request”, then “request new supplier”.
3. A pop-up box appears and asks you to type in the supplier name, then click submit.
4. You will need to answer several questions about the supplier including contact name, contact email and phone, services/goods being provided.
5. Under “additional questions”, select email and enter your email address. This is how you will get updates regarding the registration process of your vendor.
6. Click “next” in the bottom right of your screen.
7. On the next page, click the box that says you are ready to submit and then submit. A notification will pop up saying it has been submitted.
8. If you or the vendor has any questions regarding the registration process, please email supplier@clemsun.edu or call 656-2390.

TRAVEL AUTHORIZATION NOTE

Please remember to cc Melissa King (king4@clemsun.edu) on all travel authorizations. The authorizations must be completed **PRIOR** to booking **ANY** travel arrangements.