



# Guided **BU**ying

## Frequently Asked Questions

### Transition to New System

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- When will **Guided BUying** be live for the Boston University community?
  - **Guided BUying** will go live on August 3, 2020.
- How do users access **Guided BUying**?
  - Requisitioners will access **Guided BUying** through [MyBUworks](http://www.bu.edu/mybuworks): <http://www.bu.edu/mybuworks>
- Will I be able to see SRM shopping carts and POs in **Guided BUying**?
  - No, shopping carts and POs from SRM will not be transferred to **Guided BUying**.
- I will need to access to my old orders, how do I get that?
  - All historical data will be available in the Business Warehouse (BW), via reporting. For training on how best to view data via reporting in BW, sign up for training with Bill Stewart here: <https://www.bu.edu/tech/about/training/classroom/buworks/>.
- Will training be available before go-live?
  - **Guided BUying** training will take place in July via Zoom. After go-live, we will continue to host trainings. Reference Guides and FAQs will be available on the [Sourcing & Procurement Website](#).
- How can I stay updated on **Guided BUying** announcements?
  - Please visit the [Sourcing & Procurement website](#) for announcements: (<https://www.bu.edu/sourcing/sap-ariba-guided-buying/>). Sign-up [here](#) (<https://www.bu.edu/sourcing/newsletter-signup/>) to subscribe to our newsletter.
- What are the biggest differences between the current system and **Guided BUying**?
  - **Guided BUying** provides an intuitive shopping experience, the ability to easily view Purchase Requisitions (PRs) and POs, and a streamlined approval process. In SRM shoppers can only set their street address in personalization, however, in **Guided BUying**, Requisitioners will be able to set their cost center, street address, floor, and room number, all of which will flow to PRs.

### Cutover

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- When is the last day the Terrier Marketplace can be used?
  - To transition from SRM to **Guided BUying**, shopping carts in SRM will be disabled on **Friday, July 24, 2020, at 5:00 pm**. Please place all shopping carts prior to July 24, 2020, and allow enough time for all required approvals to occur before 5:00 pm, to ensure all orders can be processed. Otherwise, the order will need to be processed in **Guided BUying** on or after August 3, 2020. Note, the use of your departmental PCard and Amazon Business will be unaffected during this period and can be utilized for authorized and approved purchases.
- Whom should I contact with questions or for help during the cutover period?
  - Please submit any questions to Sourcing & Procurement via the [Financial Affairs Customer Service Portal](#).



# Guided **BUYing**

## Frequently Asked Questions

### Purchase Requisition/PO

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- Will Requisitioners create Limit Orders in **Guided BUYing**?
  - Amount Based Ad Hoc Requests and BPOs (Blanket Purchase Orders, otherwise known as invoicing off contract) will replace Limit Orders in **Guided BUYing**.
- Will Requisitioners be able to make changes to a PR after submitting the request?
  - Requisitioners will be able to make changes to a PR as long as it has not been fully invoiced. Modifications to the cost object, price, or quantity will prompt reapproval of the PR. After a PR has been fully invoiced, changes must be made via a journal entry or a new PR.
- How do I route an unsigned contract to Sourcing & Procurement for negotiation and signature?
  - Contracts should no longer be attached to orders to request review. Instead, Requisitioners should submit the *Contract Request Form* in **Guided BUYing**. The form, populated with as much detail as possible, will be routed to a Sourcing & Procurement team member who will work directly with the supplier and business unit to facilitate the transaction. Please engage Sourcing & Procurement as early as possible—ideally, as early as the planning stages—as the process takes some time and is largely dependent on the suppliers' responsiveness. Expectations should be set at a minimum of two weeks.
- How do I request a new supplier be registered?
  - Orders will no longer be placed unless a supplier is assigned to the requisition. Therefore, if Requisitioners choose to order products and services from an unregistered supplier, Requisitioners should submit the *Supplier Registration Form* in **Guided BUYing** before setting up a requisition. The form will be routed to Sourcing & Procurement at which point we will review the practicality of registering the supplier or help source the product or service from one of our many registered suppliers to save your department time and money. If the supplier is being used once, we suggest using your PCard for authorized products. Always look to our registered and contracted suppliers for goods and services before considering unregistered suppliers.

### Invoice / Payments

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- Will Requisitioners be able to view invoices in **Guided BUYing**?
  - Yes, Requisitioners will be able to view the payment status of their purchase order by navigating to the "Your Request" section in in **Guided BUYing** click on the purchase order number. Once the purchase order is open, click on Payment.
- Will Requisitioners receive an notification when an invoice is sent for their purchase order in **Guided BUYing**?
  - Yes, the Requisitioner will receive an email notification stating an invoice is available to review or approve. Requisitioners can also navigate to the **Guided BUYing** "To Watch" list or "Your Approvals" list to review invoices as well.
- Will Requisitioners still be able to hold invoices under \$5,000?
  - Yes, the current process in BUworks to hold an invoice under \$5000 will stay the same. When the Requisitioner is ready to release the invoice hold, please contact Accounts Payable via the [Financial Affairs Customer Service Portal](#) to release the hold.



## Guided **BU**ying Frequently Asked Questions

- Will Requisitioners be able to view payment status in **Guided BUying** for invoices pertaining to their purchase orders?
  - Requisitioners will be able to view the payment status of their purchase order by navigating to the “Your Request” section in in **Guided BUying** click on the purchase order number. Once the purchase order is open, click on Payment.
  
- Will suppliers be able to send invoices via email?
  - Yes, suppliers will have to complete an onboarding process to send the invoice as an attachment via email. Upon completion of the onboarding process, the new email address will be made available to the supplier.
  
- What action can a Requisitioner take to resolve an invoice exception in **Guided BUying**?
  - An invoice exception occurs when the purchase order information and the invoice data do not align. Invoice exceptions are located in the “Your Approval” section. After review of the invoice exception reason, the Requisitioner can reject the invoice back to the supplier for correction or modify the requisition to align with the invoice.