Blackbaud Web Purchasing

Training Session

Agenda

- **What is Blackbaud Web Purchasing?**
- **How to login to Blackbaud Web Purchasing**
- **Create a purchase requisition by adding a new product**
- **Create a purchase requisition using an existing product**
- **Add new products**

What is Blackbaud Web Purchasing

- **Web based purchasing program that is fully integrated with the Business Office operating system**
  - **More timely/efficient recognition of expenses incurred through the procurement process**
    - **More accurate budget reports**
    - **Streamlined approval process**

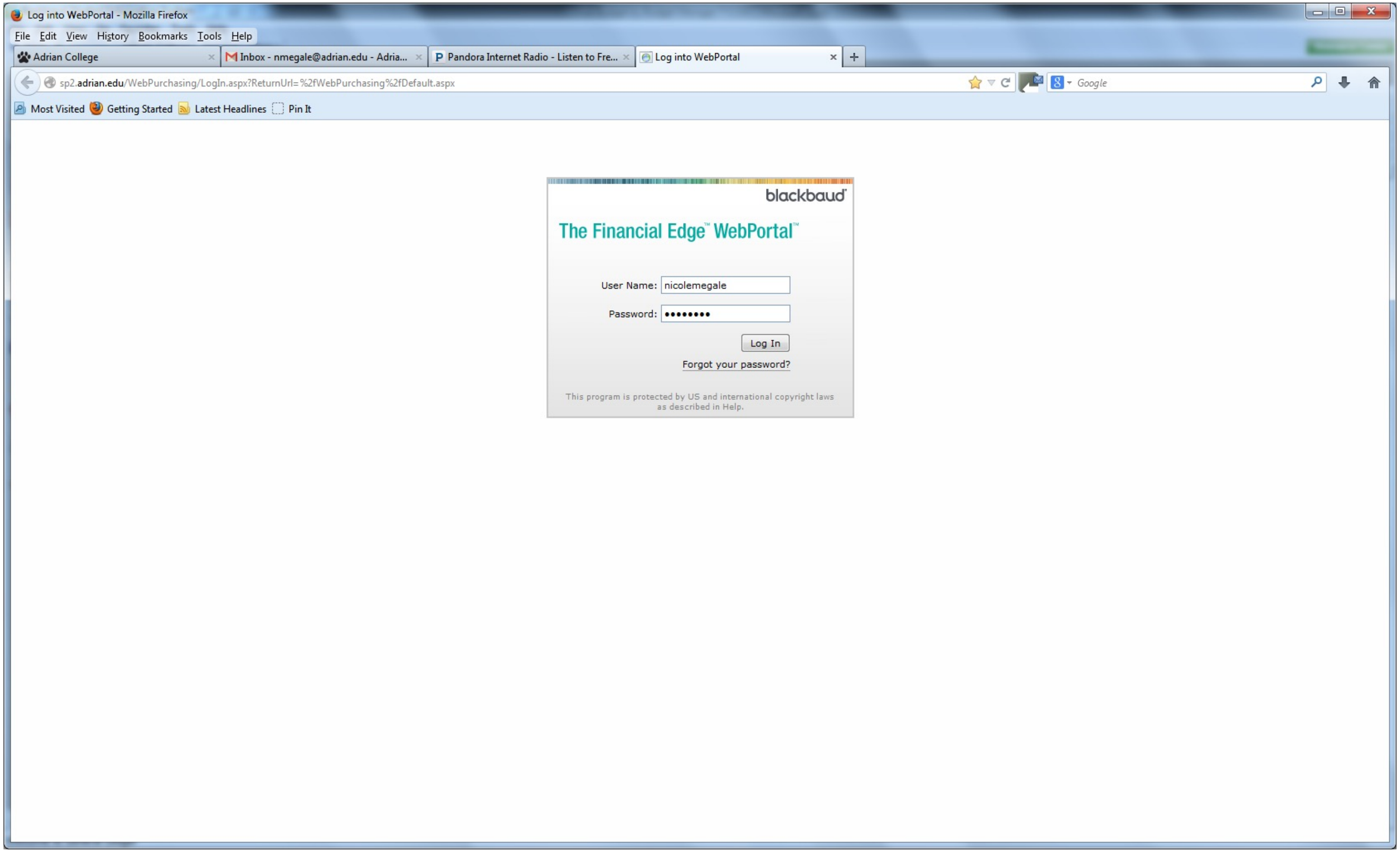
Log In to the Blackbaud System

Go to:
http://sp2.adrian.edu/WebPurchasing/LogIn.aspx?ReturnUrl=%2fWebPurchasing%2fDefault.aspx

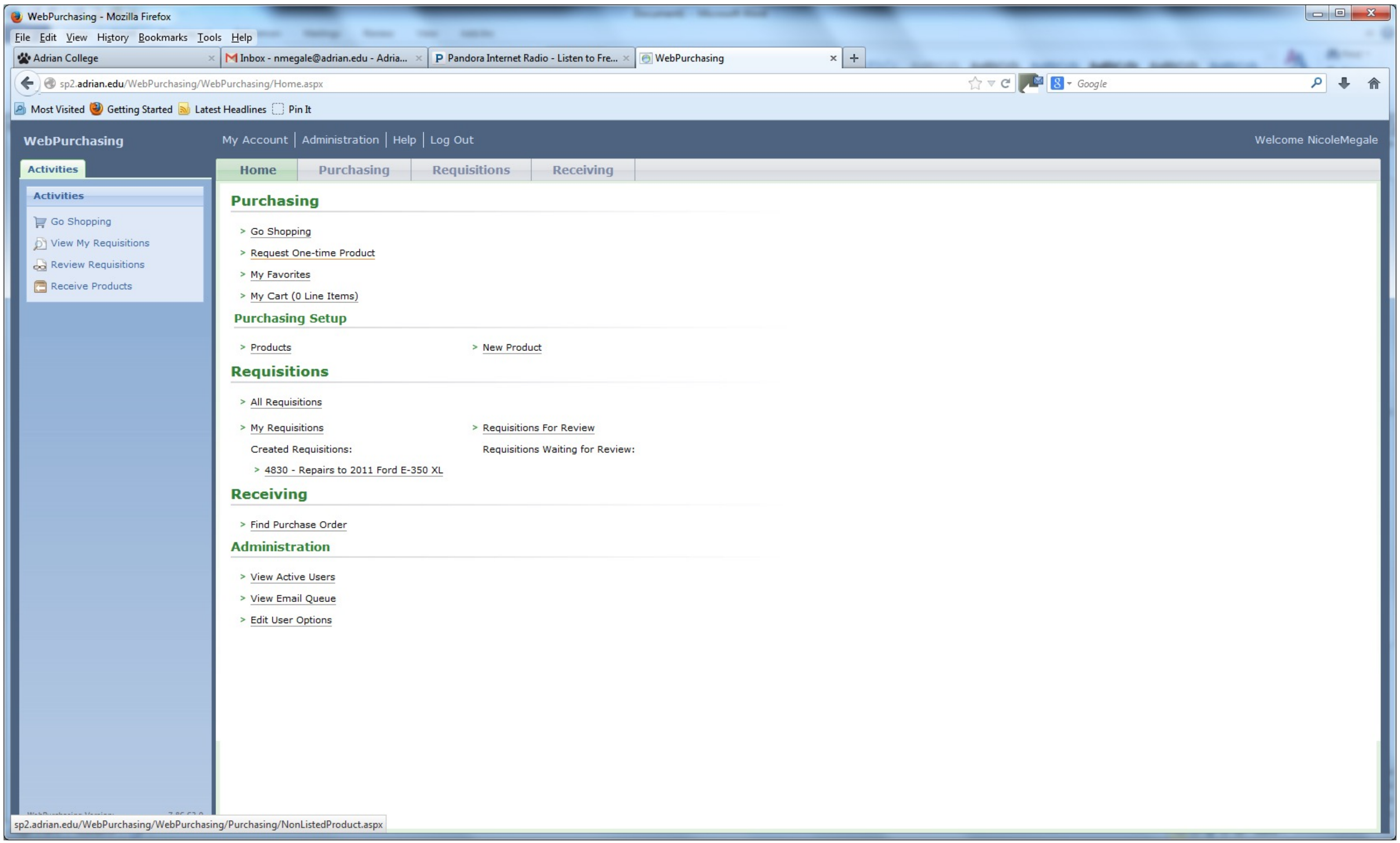
- **Please note that it is important to type the EXACT address above.**
- **You will want to save this address as a favorite.**

- **Username and password will be provided by Nicole**

Log In Screen

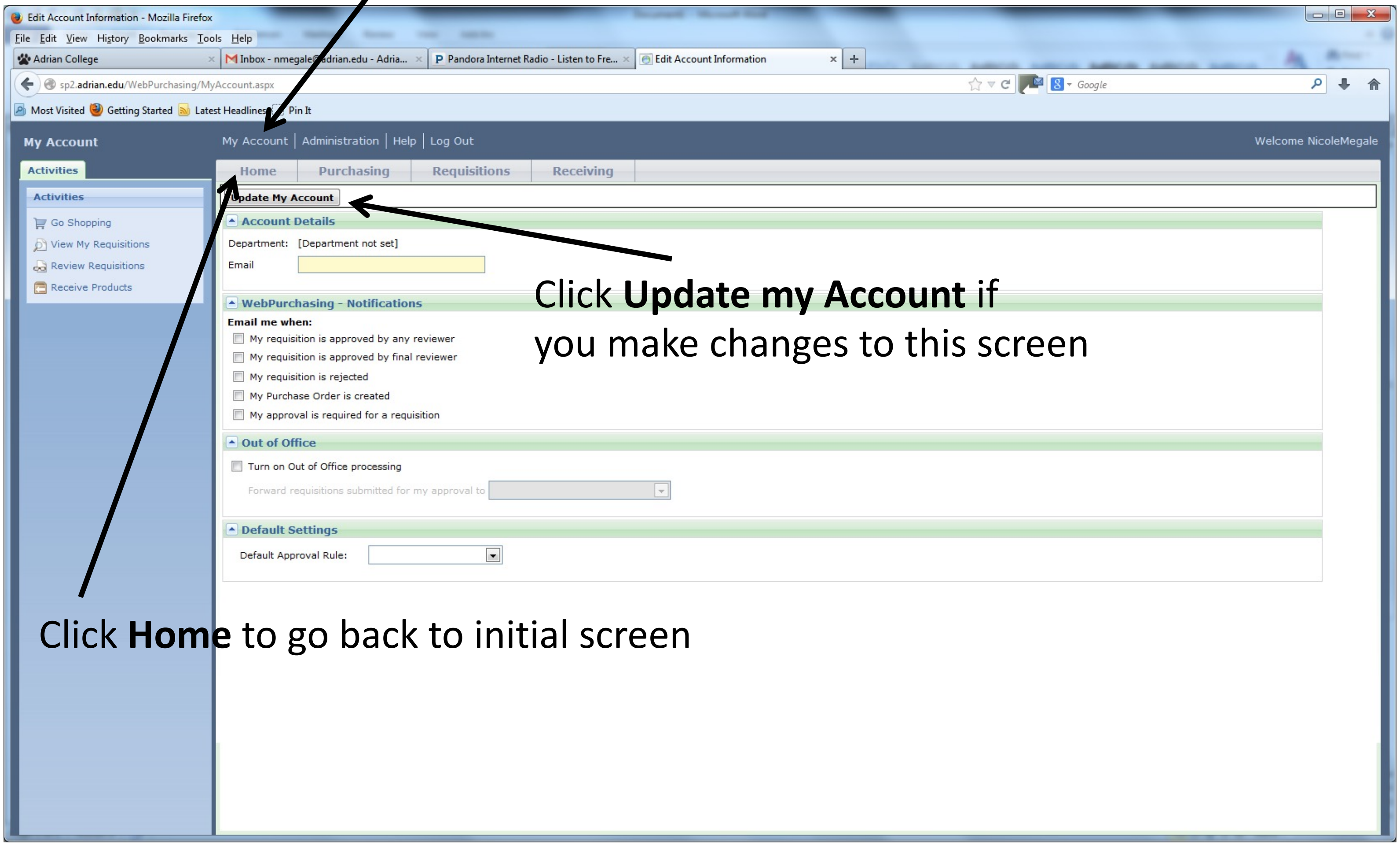


Initial Screen upon Successful Login



To See your Account Settings

Click on **My Account**



Click **Update my Account** if you make changes to this screen

Click **Home** to go back to initial screen

Options for creating a purchase requisition

- **add a one time product purchase**

or

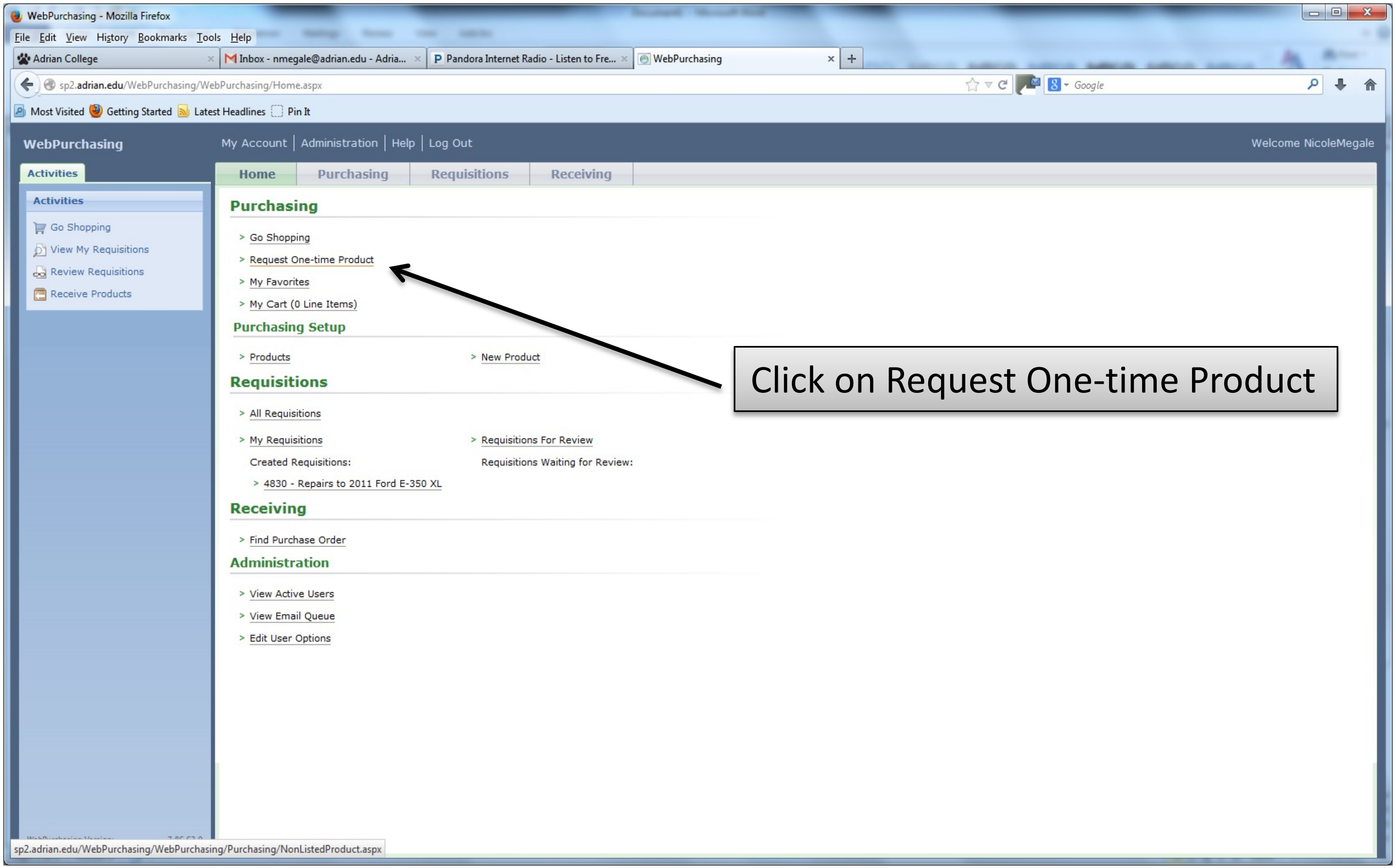
- **add a product that you will be purchasing frequently**

or

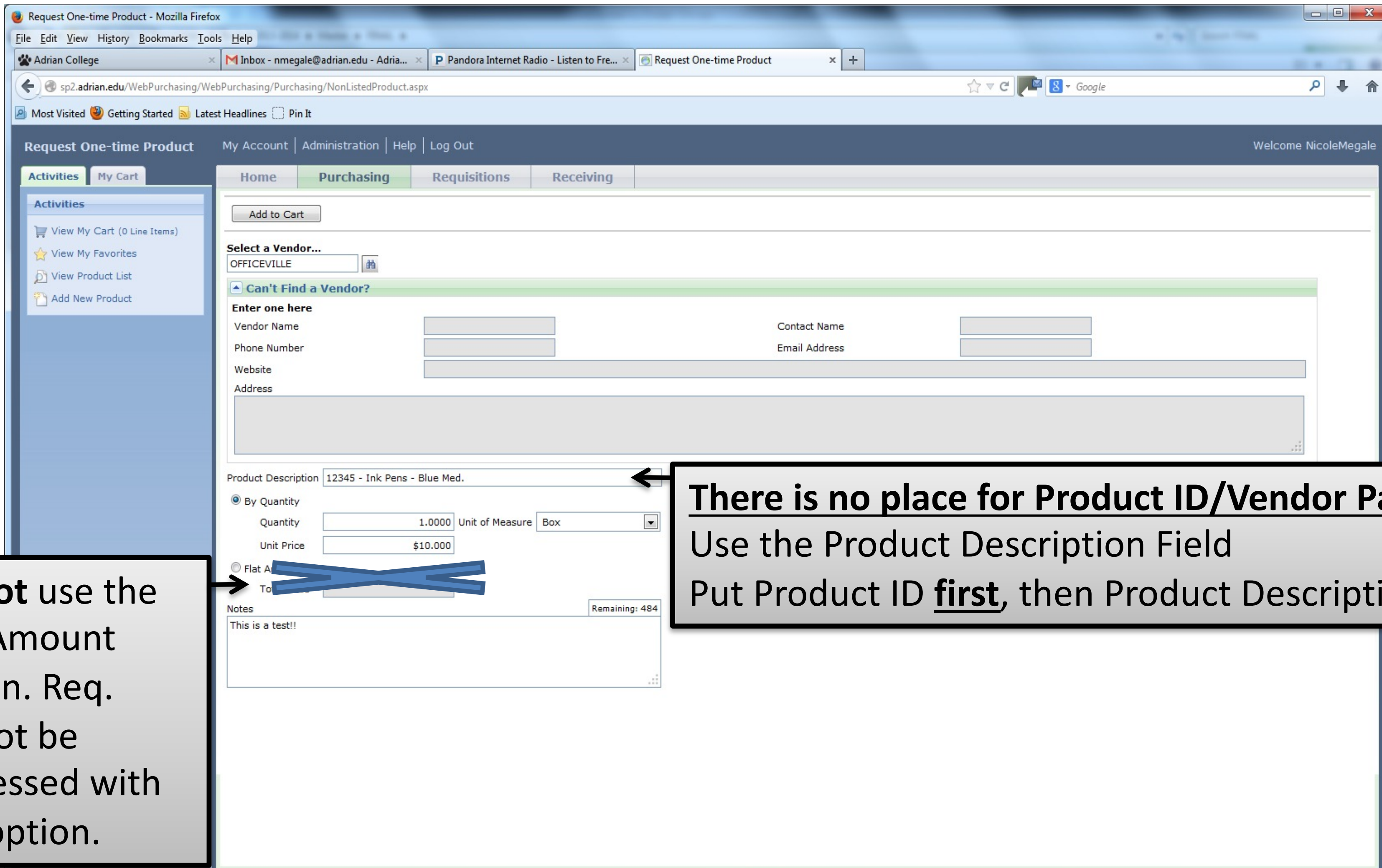
- **choose a product that is already in the list**

Process to create a purchase requisition by adding a one time product purchase

Process to create a purchase requisition by adding a one time product purchase



Add A Product Description, Quantity, Unit of Measure and Unit Price



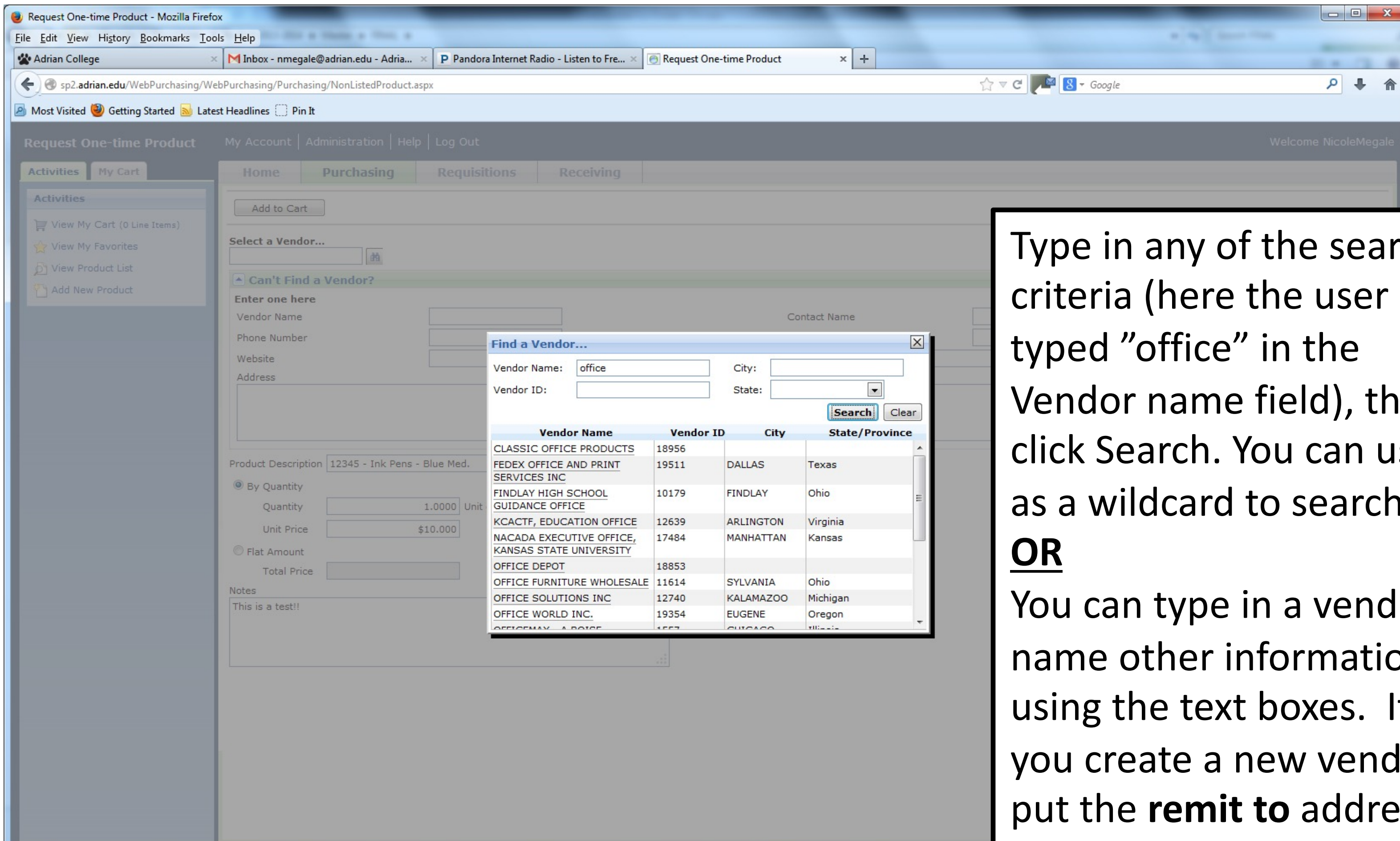
There is no place for Product ID/Vendor Part #

Use the Product Description Field

Put Product ID **first**, then Product Description

Do not use the Flat Amount option. Req. cannot be processed with this option.

Click in *Select a Vendor*, Click the Binoculars icon
<u>**or**</u>
type in the Vendor Information

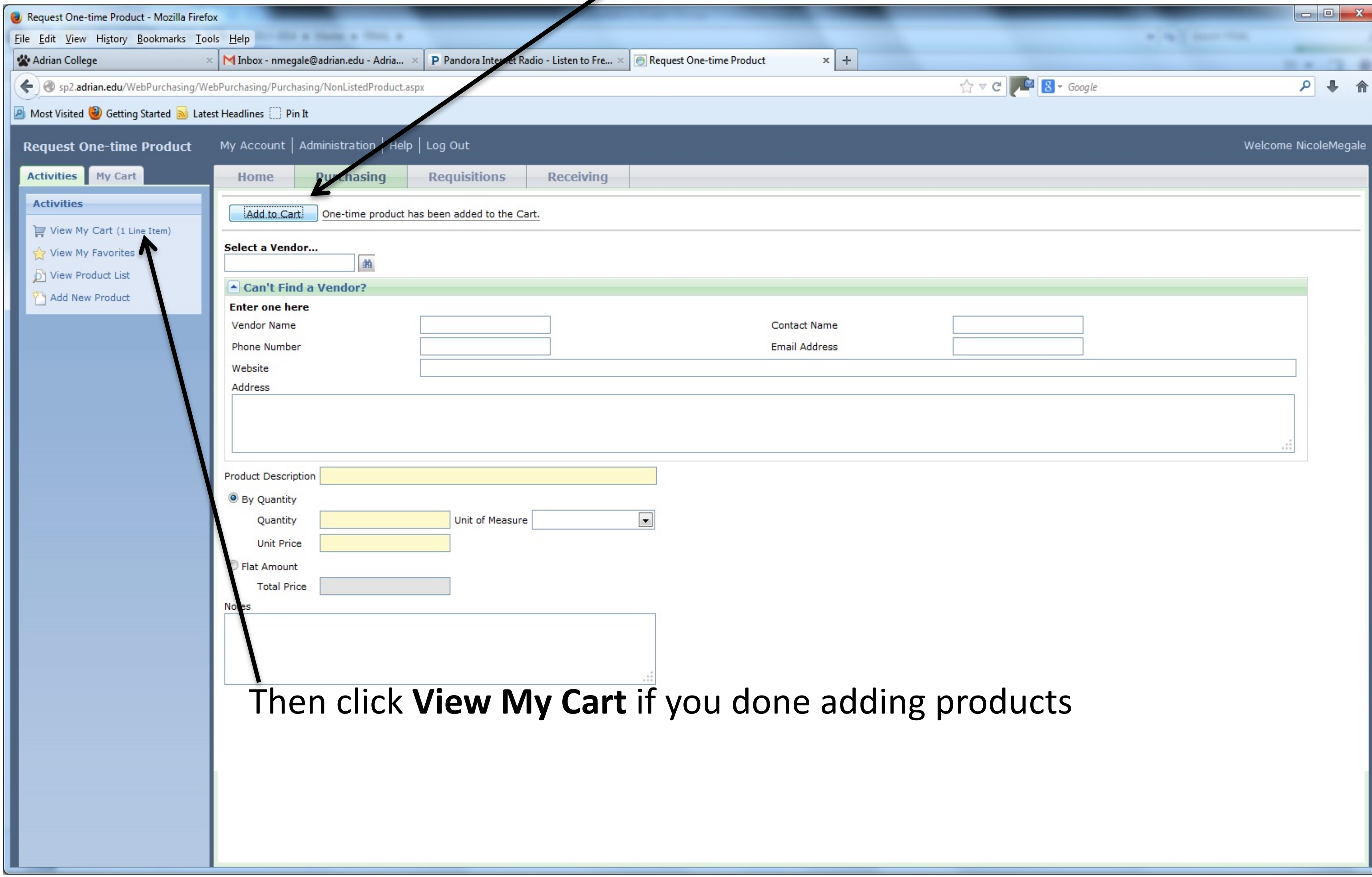


Type in any of the search criteria (here the user typed ”office” in the Vendor name field), then click Search. You can use * as a wildcard to search

<u>**OR**</u>

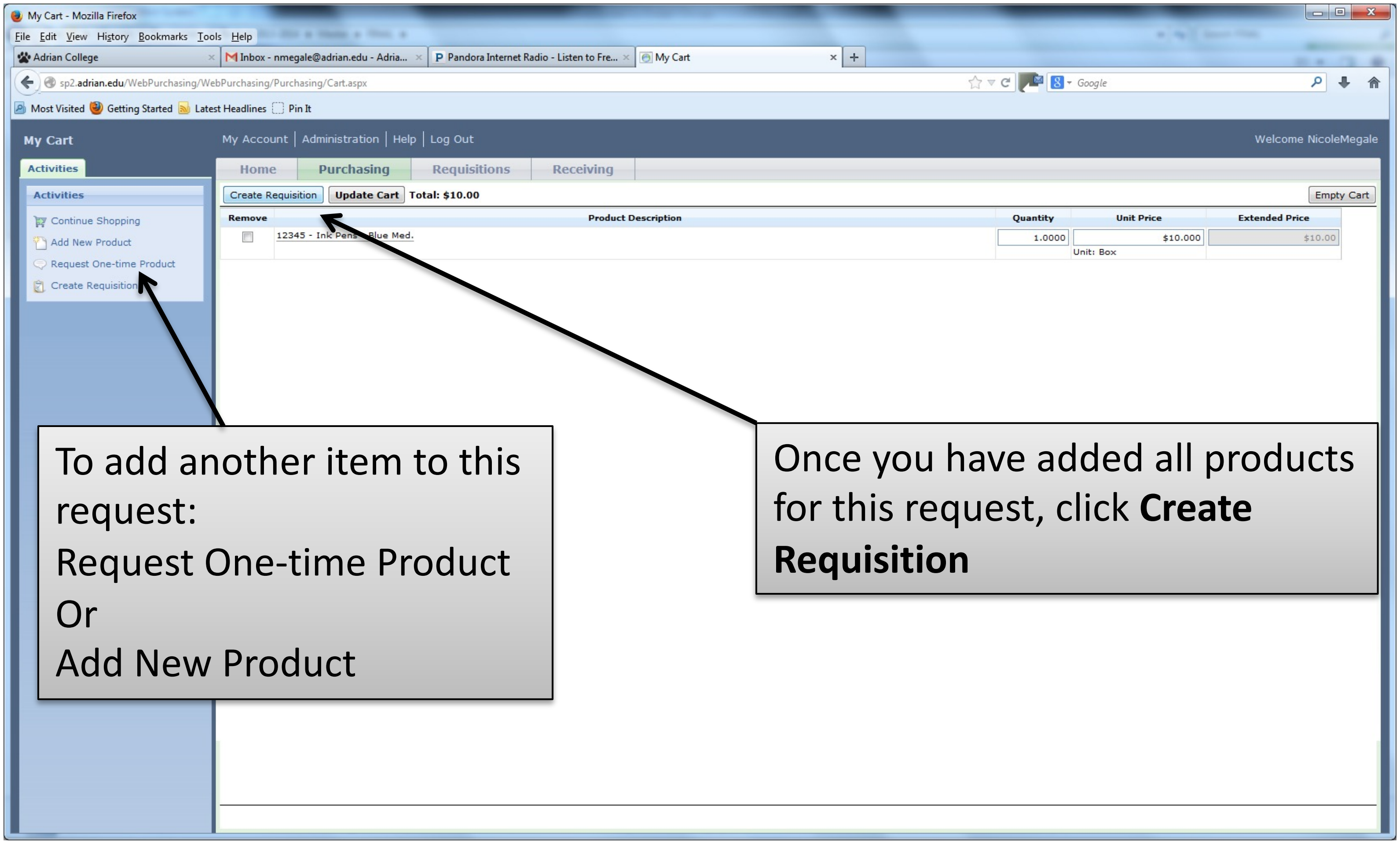
You can type in a vendor name other information using the text boxes. If you create a new vendor, put the **remit to** address in the address box

Once this is all filled in, click **Add to Cart**



Then click **View My Cart** if you done adding products

At this point, you can:



To add another item to this request:

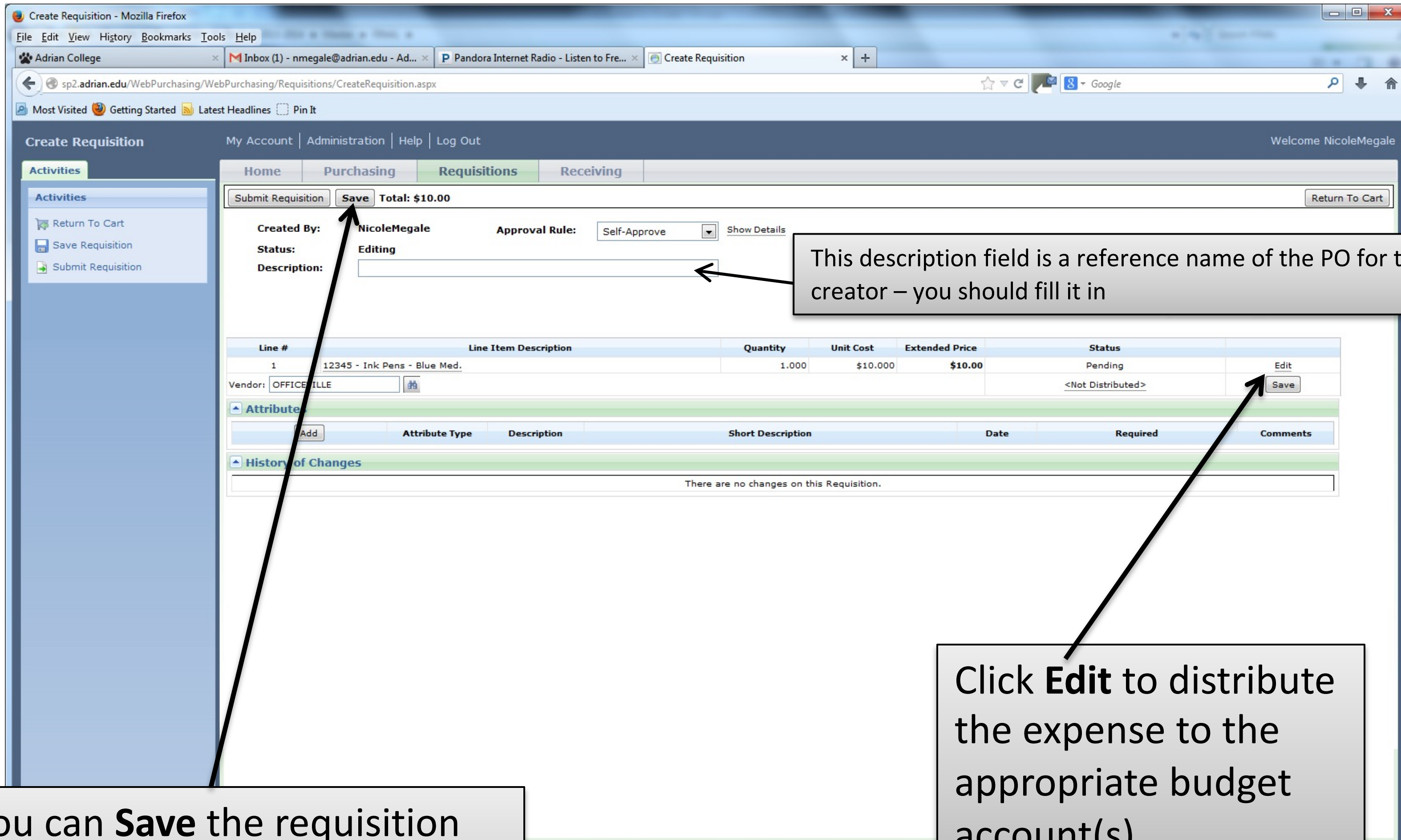
Request One-time Product

Or

Add New Product

Once you have added all products for this request, click **Create Requisition**

Click Create Requisition and review, then click Submit Requisition

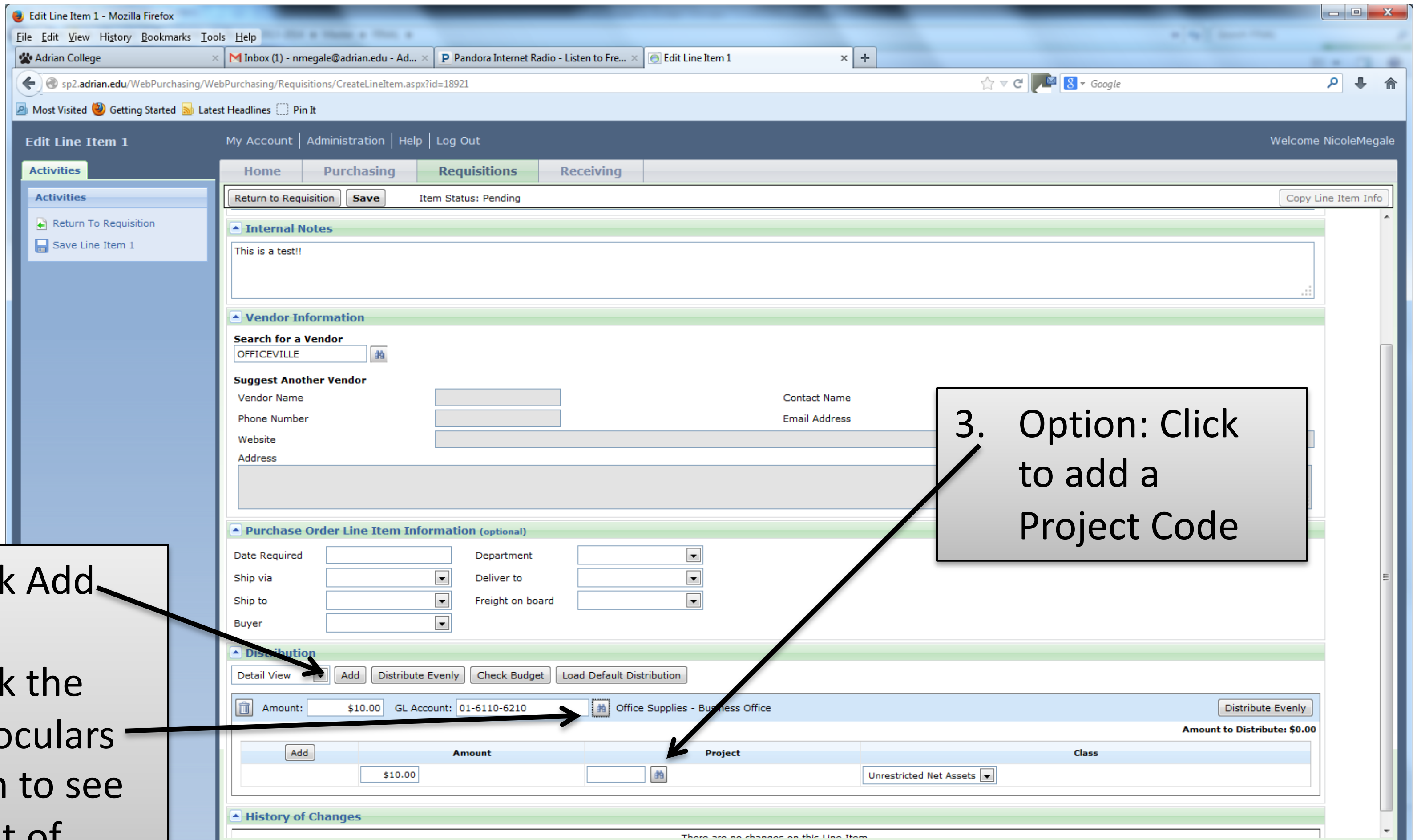


This description field is a reference name of the PO for the creator – you should fill it in

Click **Edit** to distribute the expense to the appropriate budget account(s)

You can **Save** the requisition without Submitting if you want to finish it later

Screen to istribute the Expense to the Appropriate Account(s)



1. Click Add
2. Click the binoculars icon to see a list of accounts
3. Option: Click to add a Project Code

Click here to copy information so you don't have to enter it for each item in your cart

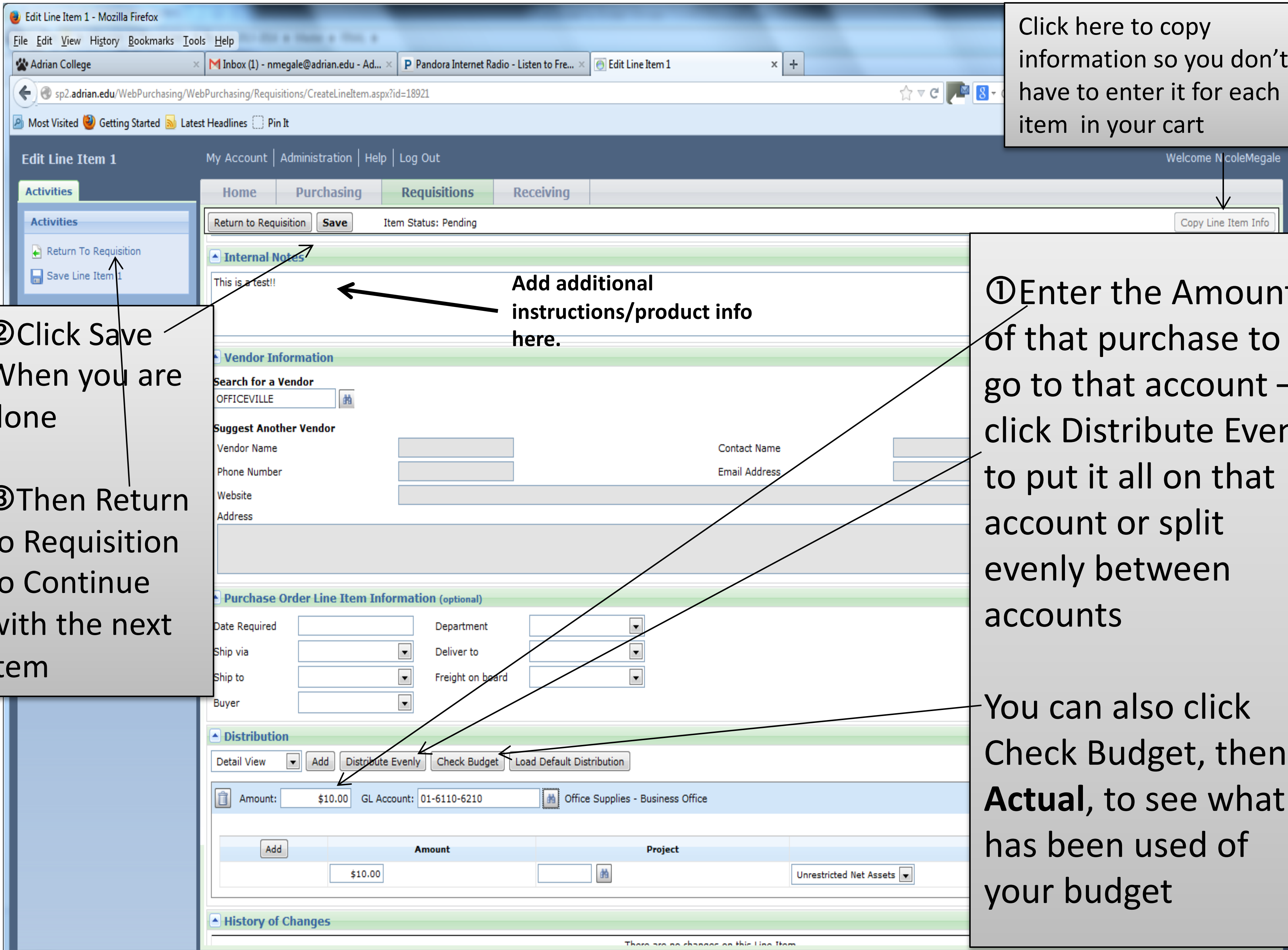
Add additional instructions/product info here.

①Enter the Amount of that purchase to go to that account – click Distribute Evenly to put it all on that account or split evenly between accounts

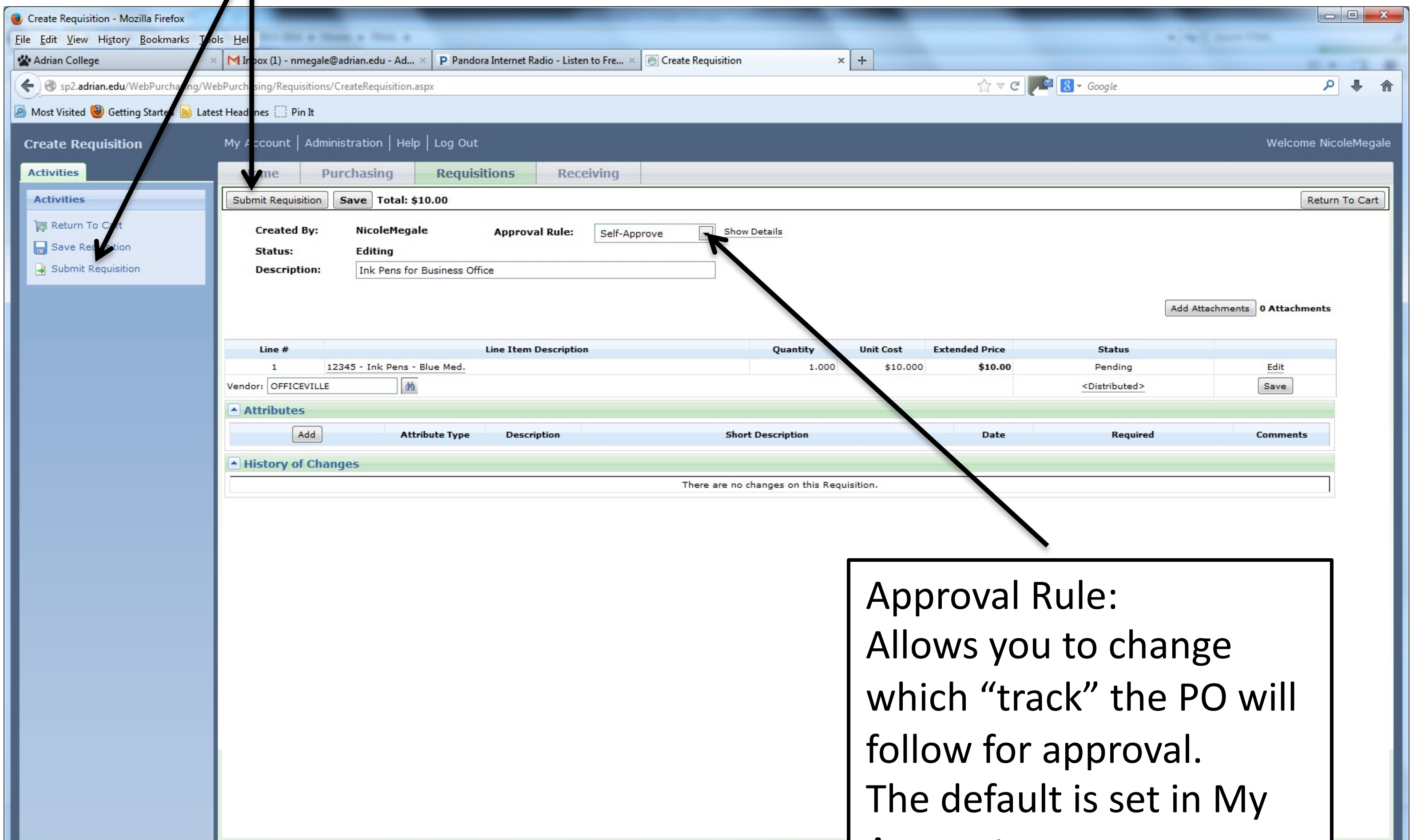
You can also click Check Budget, then **Actual**, to see what has been used of your budget

②Click Save When you are done

③Then Return to Requisition to Continue with the next item



When you are finished adding items, click Submit Requisition to send it to Purchasing

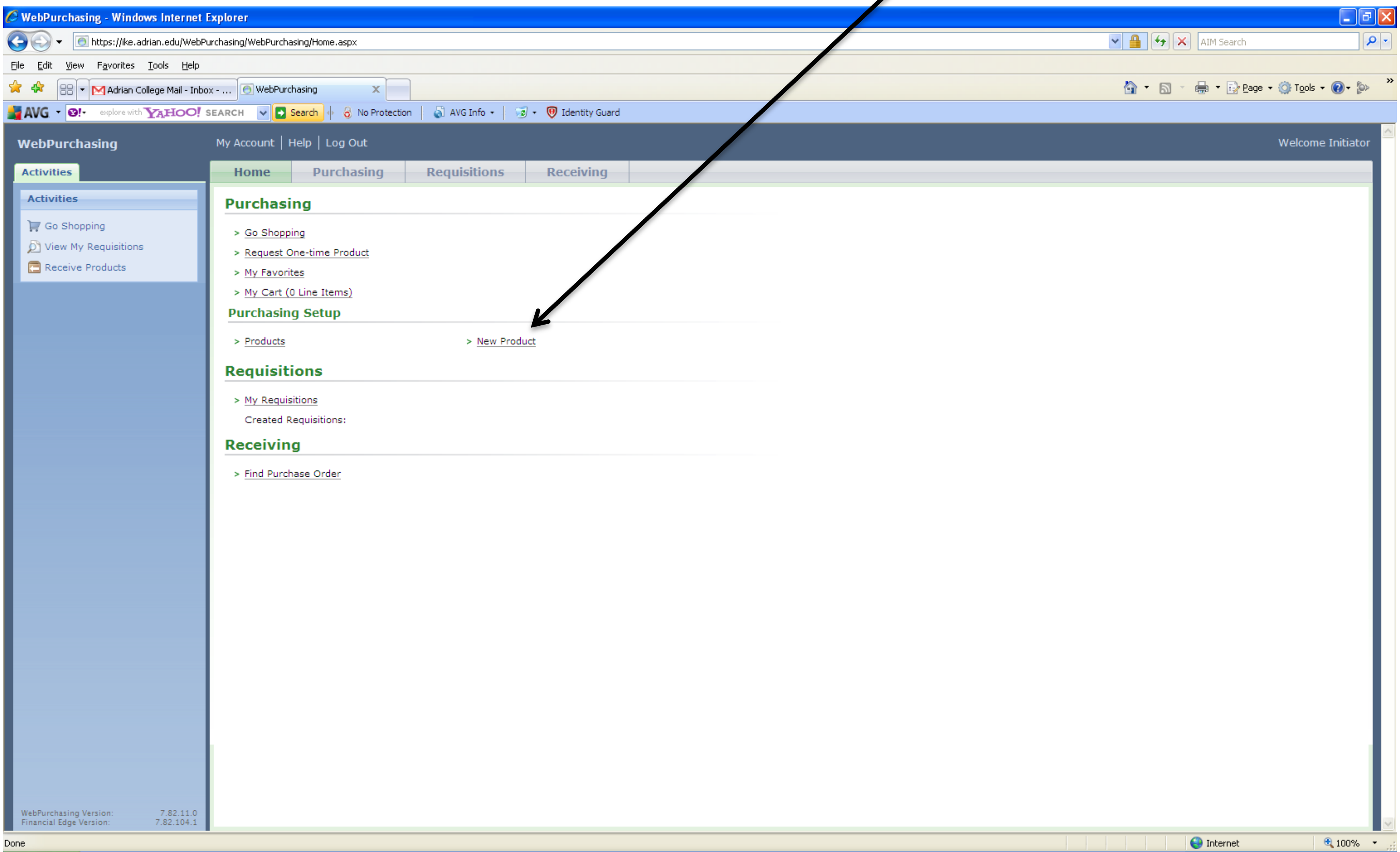


Approval Rule:
Allows you to change which "track" the PO will follow for approval.
The default is set in My Account

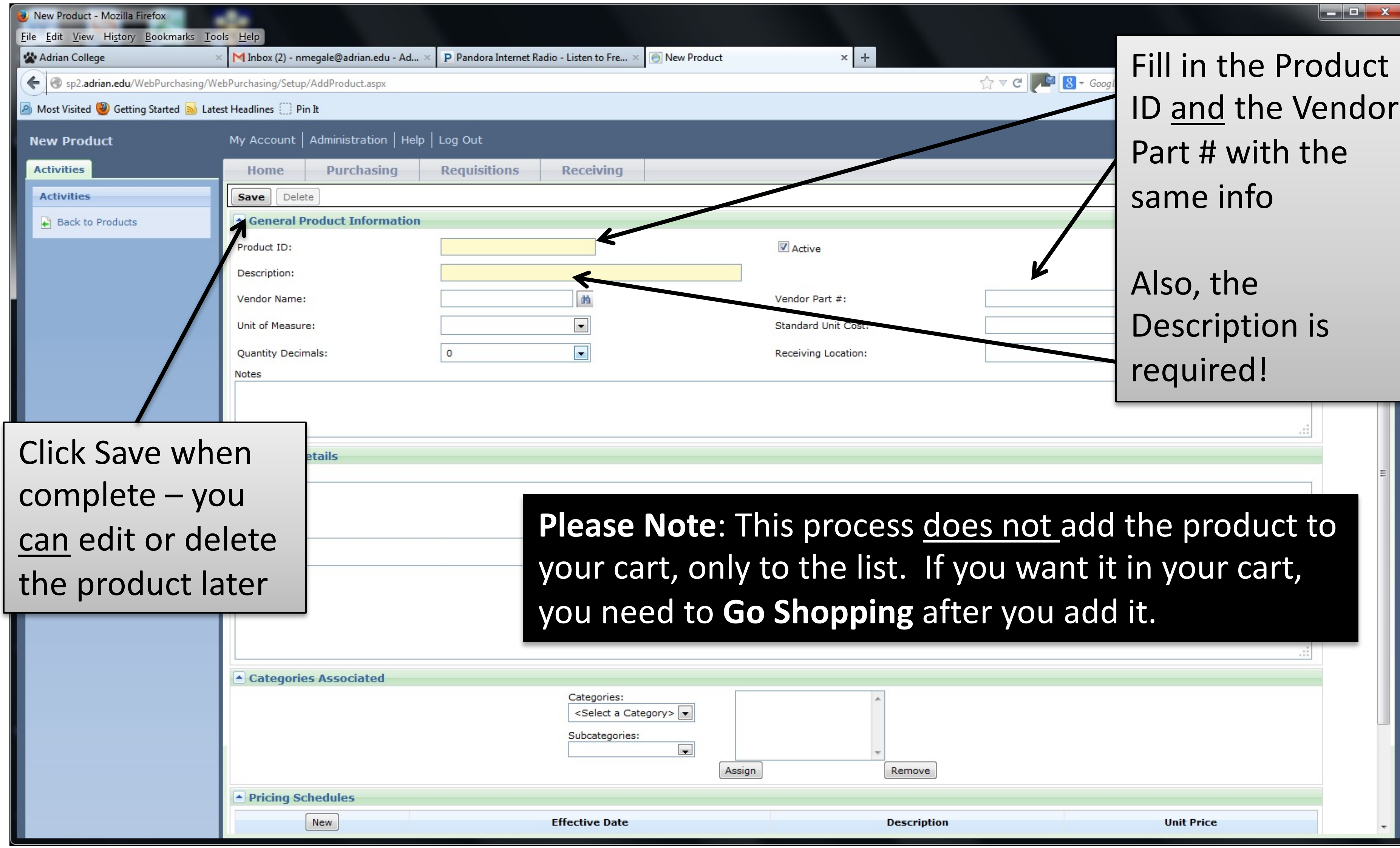
Add a product that you will purchase frequently to the “Go Shopping List”

You would only use this option when you have a product that you will order again and again. Otherwise, you will use the “One-Time Purchase” option described earlier.

From the Home screen, click on **New Product**



Fill in Product Information



Fill in the Product ID <u>and</u> the Vendor Part # with the same info

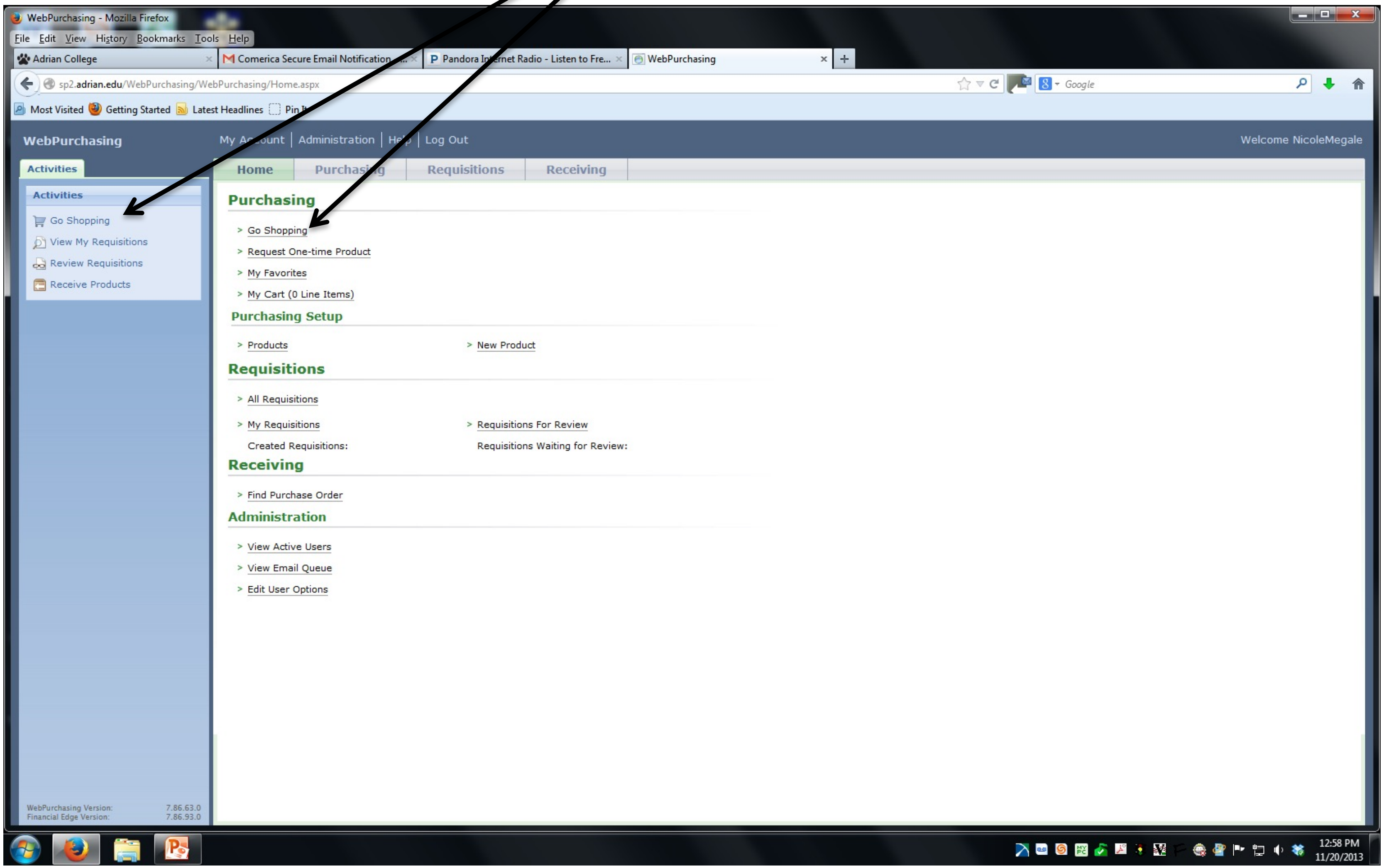
Also, the Description is required!

Click Save when complete – you <u>can</u> edit or delete the product later

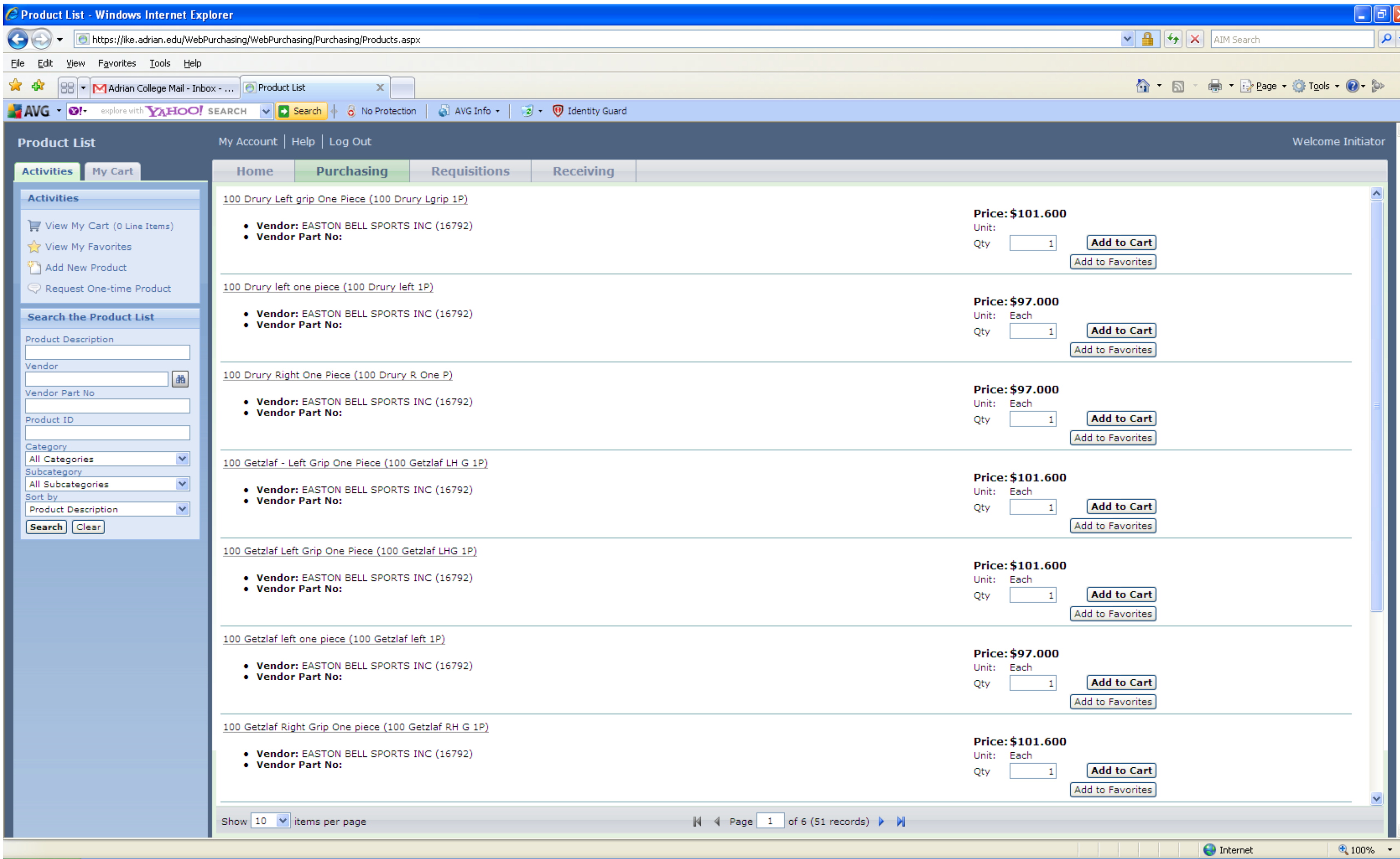
Please Note: This process <u>does not</u> add the product to your cart, only to the list. If you want it in your cart, you need to **Go Shopping** after you add it.

Process to select an existing product from the "Go Shopping" list

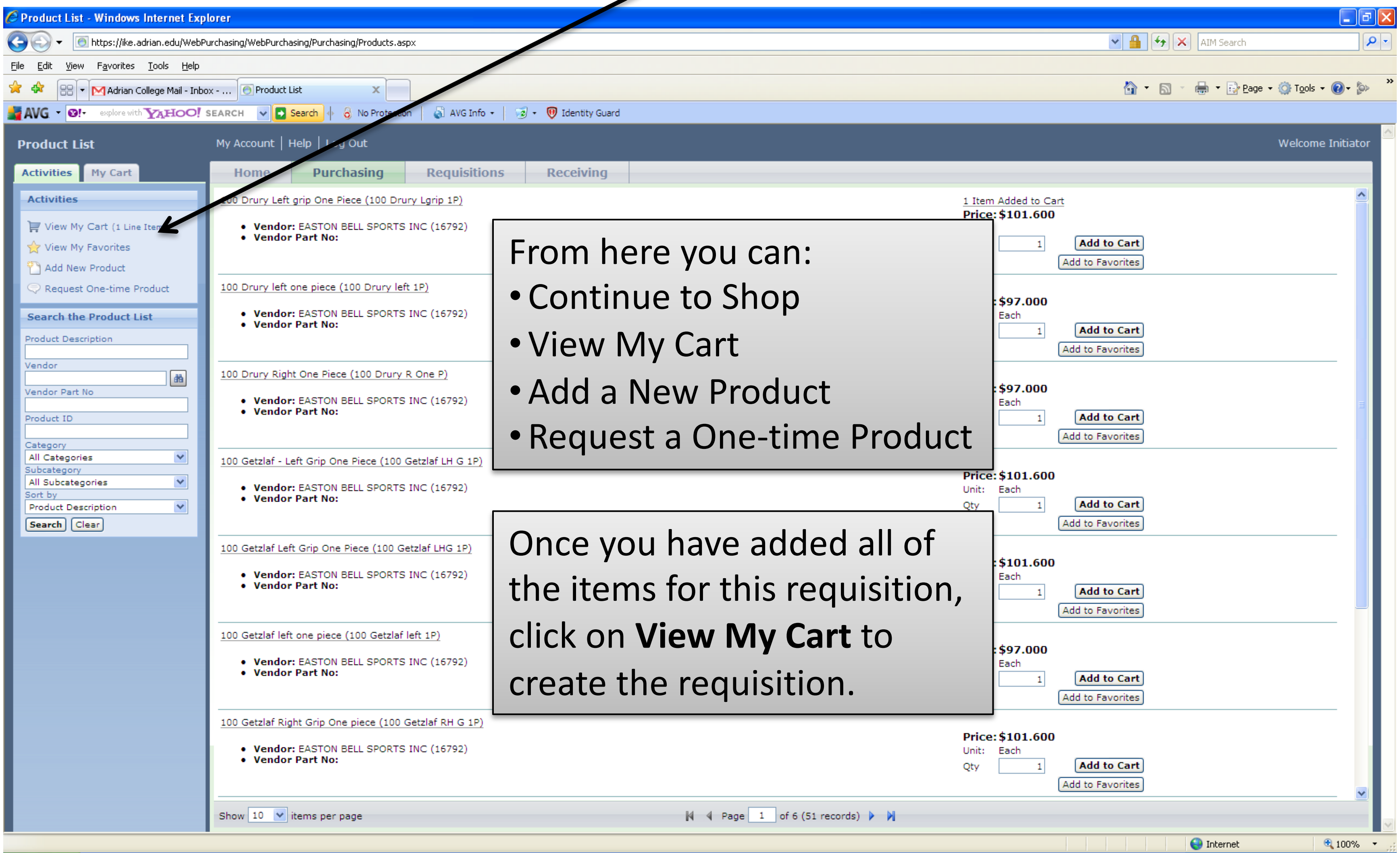
Click Go Shopping



Search for a product (based on the description that you entered when adding it to the product list), enter the quantity needed, then **Add to Cart**



You will see the cart items number change as you add items to cart

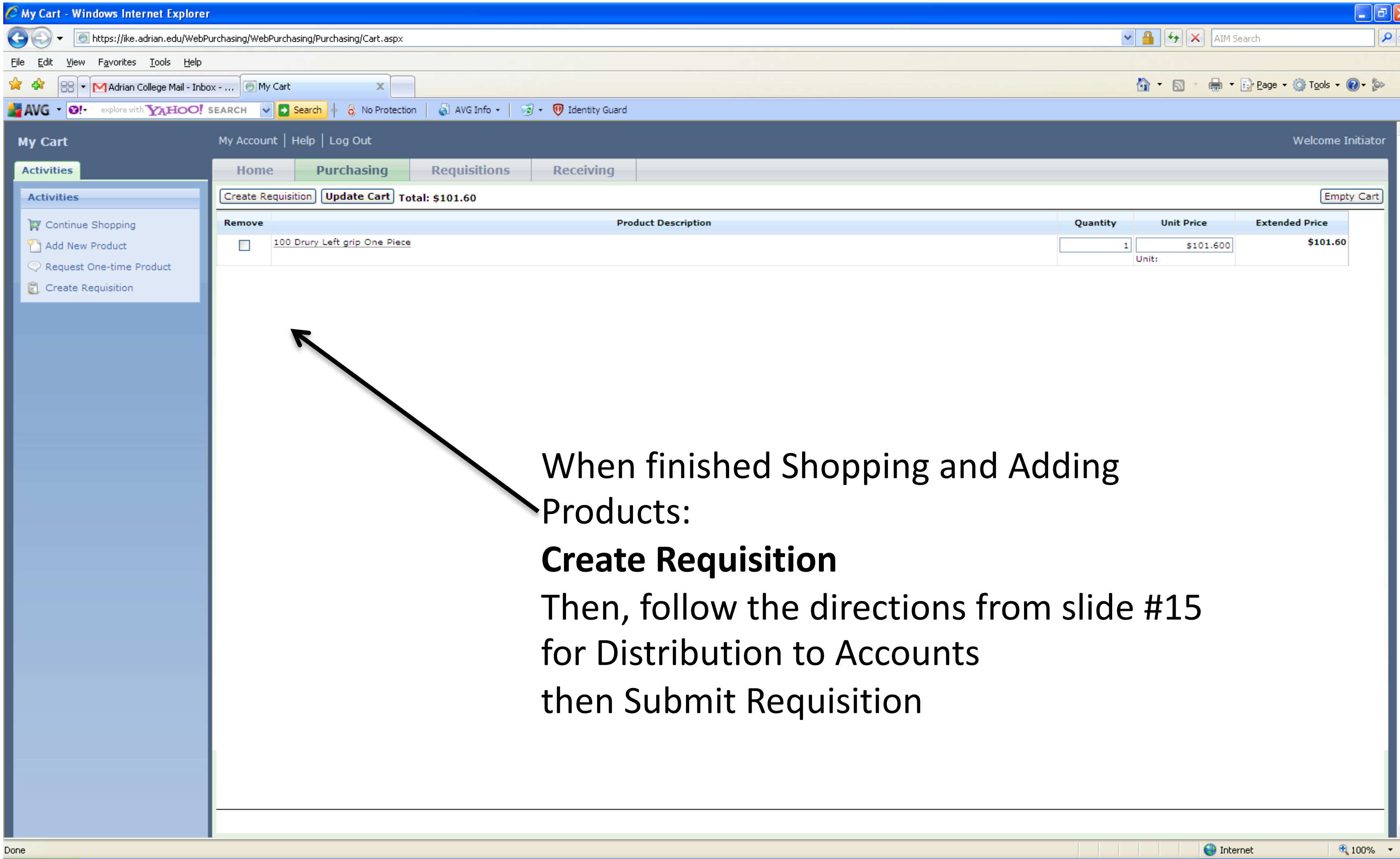


From here you can:

- Continue to Shop
- View My Cart
- Add a New Product
- Request a One-time Product

Once you have added all of the items for this requisition, click on **View My Cart** to create the requisition.

You will see this screen when you select **View my Cart**



When finished Shopping and Adding Products:

Create Requisition

Then, follow the directions from slide #15 for Distribution to Accounts

then Submit Requisition