Wu-Buy Checkout Process

1. **Bill To:** Wichita State University is the default and only available value for this field.
2. **Ship To**: select the WSU location the items should be delivered to. (This field will default to the last Ship To you selected) A full list of active Ship To locations can be found [here](https://www.wichita.edu/services/purchasing/wu-buy.php).
3. **Attn**: Enter the room number followed by the first and last name of the person receiving the items. (The 'Attn' field will always default to your full name. For accurate delivery, always list room number followed by name.)
4. **Organization Unit**: This allows others within the same organization to view the order.
5. **On Behalf Of:** Some users (example ITS) have been granted access to create transactions on behalf of other users. If applicable, select the appropriate user and corresponding Organization Unit.
6. **Order Type:** Typically, this section will not be modified. \*\*\***If WSU’s Procure to Pay process has NOT been followed and an invoice has already been received, you will need to change from a ‘Standard Order’ to a ‘Retrofit Order’\*\*\* Click on the Order Type line and check box for ‘Retrofit Order’. Input Related Invoice number if you have it, change Order Date, and leave Order Submission as ‘Do Not Send’ b/c we don’t want the supplier receiving a new purchase order\*\*\*.**
7. **Delivery Date**: Optional field should be entered if the goods are required by a certain date.
8. **FOAP**: Search for or enter the appropriate Fund. If there is a default Org associated to the fund, it will populate once you exit the Fund field. If an Org does not populate, search for, and select the appropriate corresponding Org. The Account codes are searchable and, in some cases, may default. After an Account code is entered, hit Tab again to auto populate the Program field. If the Program doesn’t auto populate, search for, and select the correct Program code. If your department utilizes the Activity and/or Location fields, enter or select the appropriate values.
9. **Use Copy Down or Split buttons** – The Copy Down button will auto populate all additional items below with the same FOAP. Use this cautiously. Account codes may need to be modified. The Split button will allow you to split the cost across different FOAP’s. Split must be done on a dollar basis. Once saved, the screen will show the percentage breakdown.
10. **Edit Product:** Selecting this option will open the Edit Product window where you can update the detailed product information. Remember, this information will be sent to the supplier. Make sure to include the appropriate information about the requested goods or service.
11. **Special Instructions & Order Attachments**: Used to enter additional information the supplier **may** see (depending on order integration). Must be used to detail any binding terms and conditions that are outside the WSU Standard Terms and Conditions referenced on the PDF version of the Purchase Order. Use the Order Attachments section to attach anything important that the supplier needs to see, like quotes, mutually negotiated terms and conditions, and flow down documents.
12. **Contract:** If the supplier is connected to one or more supplier contracts, the Contract field will display. The contract number will populate if the supplier only has one available contract. Click the drop-down arrow to select the appropriate contract if the supplier has more than one contract available.
13. **Justification Notes (Business Purpose) & Justification Attachments:** Any justification notes or attachments are for internal use only; the supplier will not see them. This will be your internal justification (Business Purpose) for making the purchase. Requisitions submitted without adequate Justification (Business Purpose) will be declined. Justification Attachments can include documentation required for Informal Bids, Formal Bids, Sole Source Requests, supplier contracts or agreements.
14. **Justification Type:** WSU has configured a Requisition Questionnaire to assist browsers and buyers with following WSU policies and procedures. Browsers and buyers will answer a series of questions about the procurement and the Requisition Questionnaire will direct the user on the procurement requirements.
15. **If you are a Browser,** you can: **Save** the requisition to revisit it later, **Reassign** it to a buyer to make the purchase for you, or **Cancel** the order.
16. **If you are a Buyer** you can: **Checkout** to complete the order, **Save** to revisit later, **Reassign** to a buyer to make the purchase for you (should only be done if you don’t have access to the FOAP being used), or **Cancel** the order. (If a Browser Reassigns a requisition to you, you will be notified by email. You can access the requisition by clicking on your **Tasks** icon in the top-right corner and selecting **‘Incomplete Requisitions**’. Find the requisition, click ‘**Checkout’** and you’ll start the Checkout process from the beginning)

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