

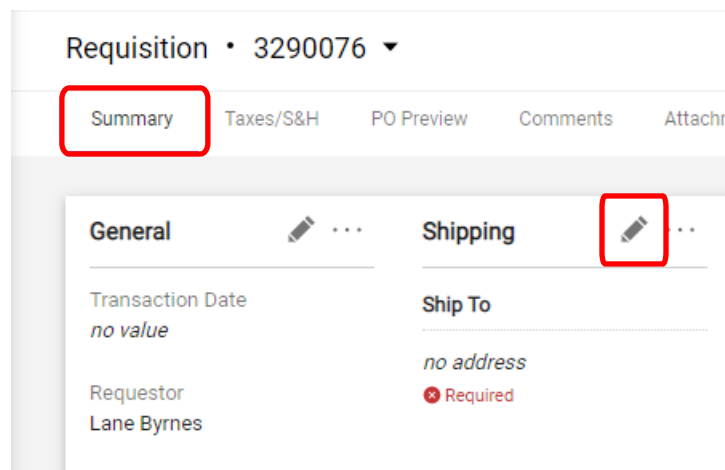
Checkout Process

What is the Checkout Process?

The checkout process in BennyBuy refers to the final screen where you will add such information as shipping/billing addresses, accounting codes, attachments, and other information relative to your order before the order is placed.

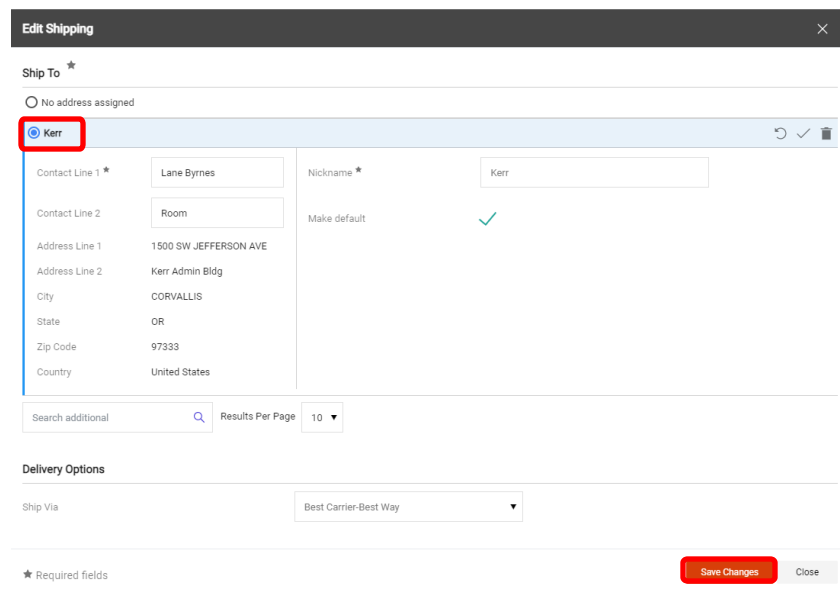
Adding/Changing Shipping and Billing Addresses

1. On the **Summary** tab, click the  icon next to the Shipping field.



The screenshot shows the BennyBuy checkout process. At the top, it says "Requisition • 3290076". Below that are several tabs: "Summary", "Taxes/S&H", "PO Preview", "Comments", and "Attachr". The "Summary" tab is highlighted with a red box. Below the tabs, there are two main sections: "General" and "Shipping". The "Shipping" section is highlighted with a red box and contains a pencil icon. The "General" section shows "Transaction Date" as "no value" and "Requestor" as "Lane Byrnes". The "Shipping" section shows "Ship To" as "no address" and "Required" with a red asterisk.

2. This will open the Edit Shipping box. If you have any shipping addresses already saved to your profile, they will be listed here. Use the radio button next to the address you wish to select and then click **Save Changes** to add the address.



The screenshot shows the "Edit Shipping" dialog box. At the top, it says "Ship To *". Below that, there is a radio button next to "No address assigned". Below that, there is a list of shipping addresses. The first address is "Kerr", which is selected with a radio button. The "Kerr" address is highlighted with a red box. The address details are: Contact Line 1 * (Lane Byrnes), Contact Line 2 (Room), Address Line 1 (1500 SW JEFFERSON AVE), Address Line 2 (Kerr Admin Bldg), City (CORVALLIS), State (OR), Zip Code (97333), and Country (United States). There is also a "Nickname *" field with "Kerr" and a "Make default" checkbox that is checked. At the bottom, there is a "Delivery Options" section with "Ship Via" set to "Best Carrier-Best Way". At the very bottom, there are "Save Changes" and "Close" buttons.

Checkout Process

- If you do not have any addresses saved to your profile, or wish to use a different address, use the Search bar to search for addresses. Generally speaking, if you are searching for on campus locations, it is best to search on the building name (i.e. Hovland, Milam, Cordley, etc.) Select the address in the popup box that appears.

Edit Shipping

Ship To *

No address assigned

BB0029 - Lane Byrnes, Room, 2701 SW CAMPUS WAY, Cordley Hall, CORVALLIS, OR 97331, United States

Cordley

Results Per Page 10

- ❖ If you would like to ship to an off campus location, search on the word “special” to bring up the Special Address.

- Once you have selected your address, make sure to edit the first two contact lines as needed. If you would like to save this address for future use, click the checkbox next to the **Add To My Addresses** field. If you do this, be sure to give your address a nickname. Click **Save Changes** once complete.

Edit Shipping

Ship To *

No address assigned

Kerr - Lane Byrnes, Room, 1500 SW JEFFERSON AVE, Kerr Admin Bldg, CORVALLIS, OR 97333, United States

BB0029

Contact Line 1 * Lane Byrnes Add to my addresses

Contact Line 2 Room 123 Nickname * Cordley

Address Line 1 2701 SW CAMPUS WAY

Address Line 2 Cordley Hall

City CORVALLIS

State OR

Zip Code 97331

Country United States

BB0029

Results Per Page 10

1 of 1


Delivery Options

Ship Via Best Carrier-Best Way

★ Required fields

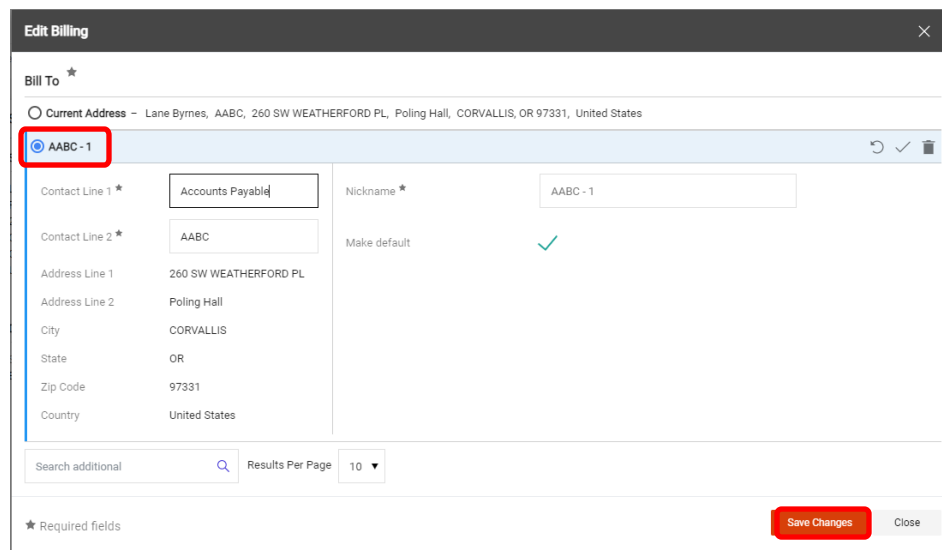
Save Changes Close

Checkout Process

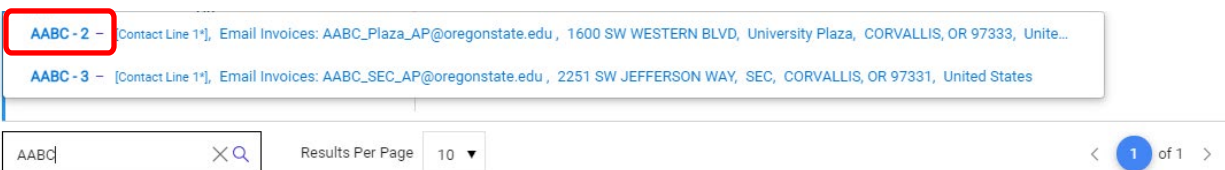
5. For Billing Addresses select the  icon next to the Billing field.



6. The Edit Billing box will open. If you have any billing addresses already saved to your profile, they will be listed here. Use the radio button next to the address you wish to select and then click **Save Changes** to add the address.

A screenshot of the 'Edit Billing' dialog box. At the top, it says 'Bill To *'. Below that, there is a radio button for 'Current Address' and a text field containing 'Lane Byrnes, AABC, 260 SW WEATHERFORD PL, Poling Hall, CORVALLIS, OR 97331, United States'. Below this is a list of saved addresses. The first address, 'AABC - 1', is selected with a radio button and is highlighted with a red box. To the right of this address is a 'Make default' checkbox with a green checkmark. Below the list are fields for 'Contact Line 1 *' (Accounts Payable), 'Contact Line 2 *' (AABC), 'Nickname *' (AABC - 1), 'Address Line 1' (260 SW WEATHERFORD PL), 'Address Line 2' (Poling Hall), 'City' (CORVALLIS), 'State' (OR), 'Zip Code' (97331), and 'Country' (United States). At the bottom, there is a search bar, a 'Results Per Page' dropdown set to 10, and 'Save Changes' and 'Close' buttons.

7. If you do not have any addresses saved to your profile, or wish to use a different address, use the Search bar to search for addresses. Billing addresses can be searched by Business Center acronyms (i.e. BEBC, AABC, etc.). If you are unsure of your Business Center's acronym, please contact your Business Center.


A screenshot of a search results list. The first result is 'AABC - 2' with a red box around the text, followed by a truncated description: '[Contact Line 1*], Email Invoices: AABC_Plaza_AP@oregonstate.edu , 1600 SW WESTERN BLVD, University Plaza, CORVALLIS, OR 97333, Unite...'. The second result is 'AABC - 3' with a truncated description: '[Contact Line 1*], Email Invoices: AABC_SEC_AP@oregonstate.edu , 2251 SW JEFFERSON WAY, SEC, CORVALLIS, OR 97331, United States'. Below the list is a search bar containing 'AABC', a 'Results Per Page' dropdown set to 10, and a pagination indicator showing '1 of 1'.

Checkout Process

- When you select a billing address, you will have the first contact line to edit. It is recommended to either put Accounts Payable or your department name in this field. If you wish to save this address to your profile for future use, click the checkbox next to the **Add To My Addresses** field and give the address a nickname. Click **Save Changes** once all fields have been entered.

The screenshot shows the 'Edit Billing' interface. At the top, there's a 'Bill To' section with three radio button options: 'Current Address', 'UABC', and 'AABC - 2'. The 'AABC - 2' option is selected. Below this, there's a table of address fields. The 'Contact Line 1' field is highlighted with a red box and contains 'Accounts Payable'. To its right is a checkbox labeled 'Add to my addresses' which is checked. Below 'Contact Line 1' is a 'Nickname' field, also highlighted with a red box, containing 'AABC'. Other fields include 'Address Line 1' (1600 SW WESTERN BLVD), 'Address Line 2' (University Plaza), 'City' (CORVALLIS), 'State' (OR), 'Zip Code' (97333), and 'Country' (United States). At the bottom right, there is a red 'Save Changes' button and a grey 'Close' button. A legend at the bottom left indicates that a star symbol (*) denotes required fields.

Adding Accounting Codes at the Header Level

- To add an accounting string for your order at the header level, scroll down to the Accounting Codes field and select the  icon.

The screenshot shows a field labeled 'Accounting Codes'. To the right of the field is a pencil icon, which is highlighted with a red box. There are three dots to the right of the pencil icon, indicating a menu or options.

Checkout Process

- The Edit Accounting Codes box will open. At a bare minimum, BennyBuy will always require an index and account code. Activity codes are optional. When entering the index code, be sure to choose the value that populates in the dropdown box. If you wish to split accounting codes, refer to the Accounting Codes Split tip sheet. Click **Save Changes** once your codes have been entered.

Accounting Codes

Chart	Index *	Account *	Activity	Fund *	Organization *	Program *	Location	Business Center Code *
C	QBA207	20101	Search	001100	410810	61000	No Value	UABC

QBA207 - QBA - Procurement and Contracts


Special Handling (add details in the internal notes field below) * Bank Code *

Not Applicable B1

★ Required fields

Save Changes Close

Adding Accounting Codes at the Line Level

- To add accounting codes for a specific line item, scroll down to where the line items are listed. For the line you wish to add accounting codes to, select the  icon for that line. From the popup menu, select Accounting Codes.

Stan Mikita Donuts · 1 Item · 1,000.00 USD

^ SUPPLIER DETAILS

PO Number	To Be Assigned	Quote number	no value
Contract	no value	PO Clauses	Add

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Line 1			1,000.00	Qty: 1	1,000.00

Checkout Process

- The Override Accounting Codes box will open. If you have any accounting codes already entered at the header level, they will populate here. If you are changing the index, be sure to choose the value that populates in the dropdown box. Click **Save**.

Override Line 1: Accounting Codes

Chart	Index *	Account *	Activity	Fund *	Organization *	Program *	Location	Business Center Code *
C	QBA210	20101	Search	001100	410810	61000	No Value	UABC
	QBA210 - QBA - Recycling and Waste Mgmt							

* Required fields

Save Close

- Once saved, the accounting codes will now be reflected under that line.

1 Line 1 1,000.00 Qty: 1 1,000.00

ITEM DETAILS

Contract: no value Internal Note: no value
Commodity Code: no value Internal Attachments: Add
PO Clauses: Add External Note: no value
Attachments for supplier: Add

ACCOUNTING CODES

Values have been overridden for this line

Chart	Index	Account	Activity	Fund	Organization	Program	Location	Business Center Code	Fund Type
C	QBA210	20101	no value	001100	410830	51500	no value	UABC	11
C	QBA - Recycling and Waste Mgmt	Office & Administrative Supplies		ZAR - OSU General Fund Operations	QBA - Recycling and Waste Mgmt	Waste Disposal		University Administration Business Center	Budgeted Operations

- Repeat this process for other lines as needed.


Adding Internal Notes and Attachments


- To add an Internal Note or Attachment, navigate to the Internal Notes and Attachments field. Please note internal notes and attachments are internal to BennyBuy and will not be transmitted with the purchase order to the supplier.

Internal Notes and Attachments (will not be sent to supplier)

Internal Note: no value
Internal Attachments: Add

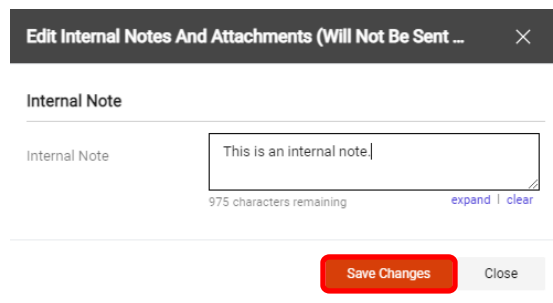
Checkout Process

- To add an internal note, click the  icon.


Internal Notes and Attachments (will not be sent to supplier)  ...

Internal Note	<i>no value</i>
Internal Attachments	Add

- The Edit Internal Notes popup box will appear. Enter your note in the text field, then click **Save Changes**.

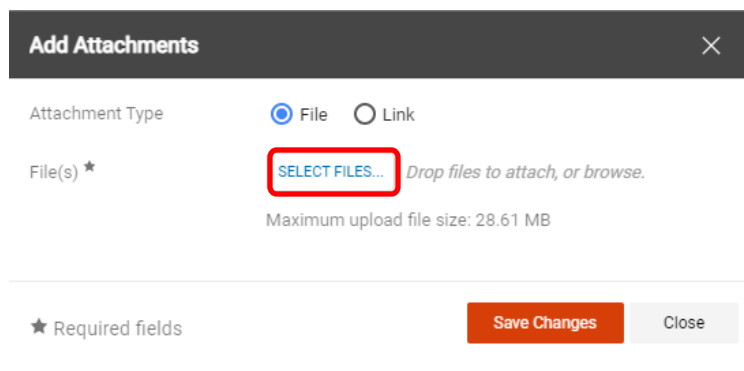


- To add an internal attachment, click the **Add** button.

Internal Notes and Attachments (will not be sent to supplier)  ...

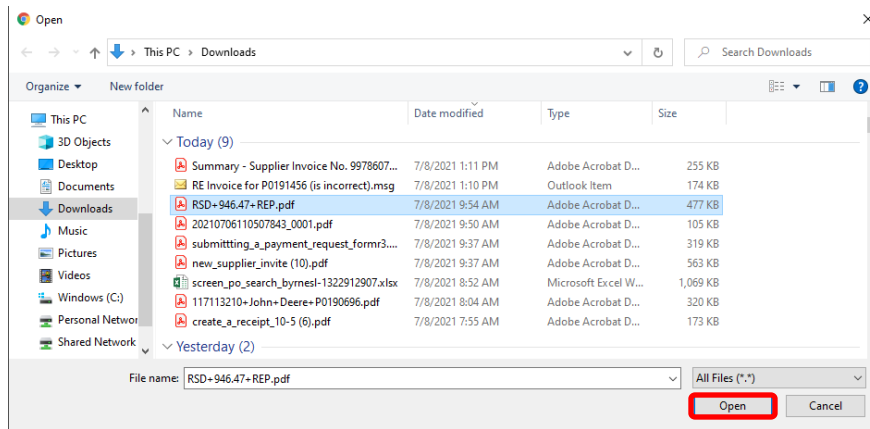
Internal Note	<i>no value</i>
Internal Attachments	Add

- The Add Attachments box will open. Click **Select Files**.

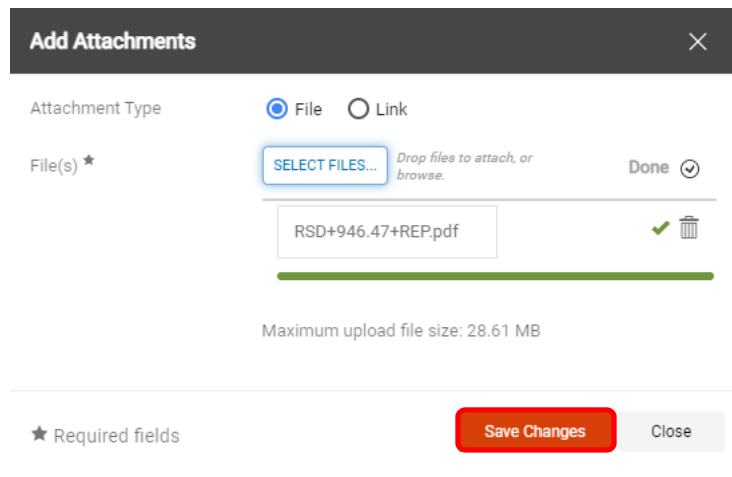


Checkout Process

- This will open the file explorer on your computer. Select the attachment you wish to add, then click **Open**.

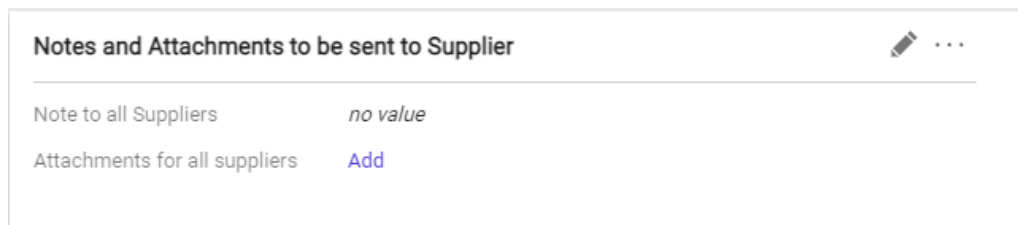


- Once the document has loaded, click **Save Changes**.



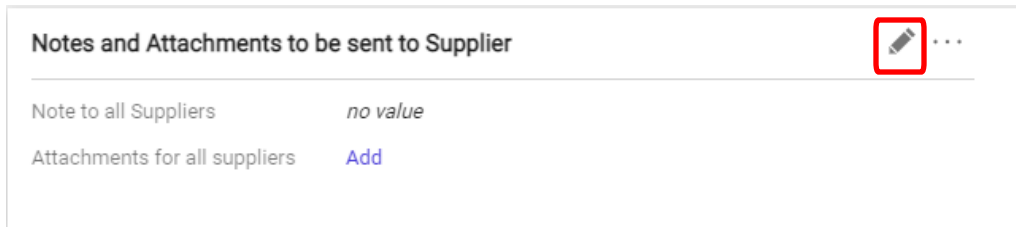
Adding External Notes and Attachments

- To add external notes and attachments, navigate to the Notes and Attachments to be sent to Supplier box. External notes will print on the purchase order, while external attachments will be included with the purchase order that is sent to the supplier. Please note this option should not be used for punchout or hosted catalog orders, due to the way they are distributed.



Checkout Process

- To add an external note, click on the  icon.

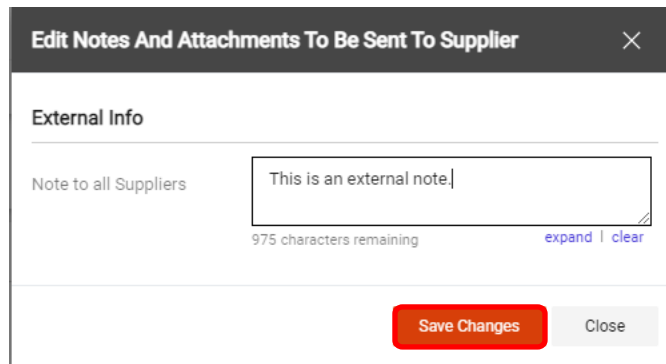


Notes and Attachments to be sent to Supplier

Note to all Suppliers *no value*

Attachments for all suppliers [Add](#)

- In the popup box, enter your note in the Note to all Suppliers field. Click **Save Changes**.



Edit Notes And Attachments To Be Sent To Supplier

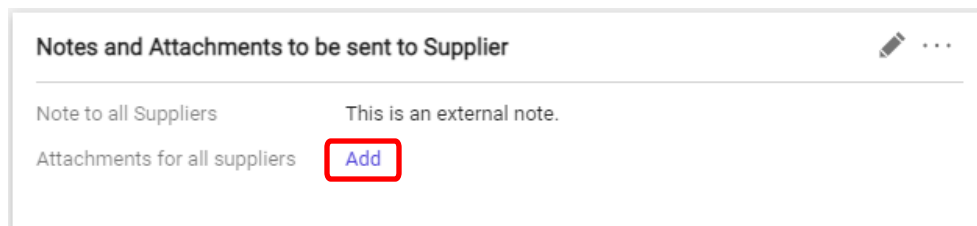
External Info

Note to all Suppliers

975 characters remaining [expand](#) | [clear](#)

[Save Changes](#) [Close](#)

- To add an external attachment, click the **Add** button.

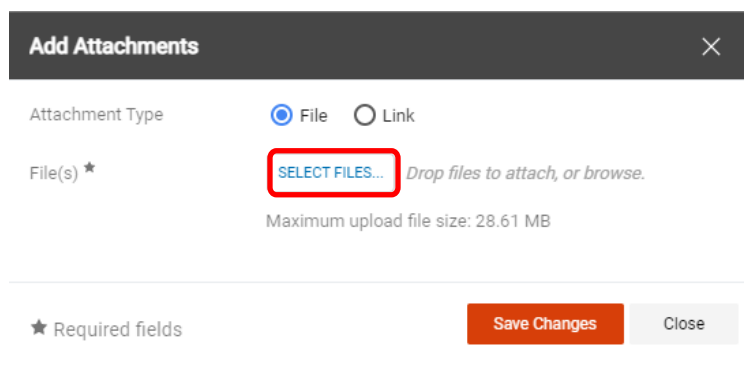


Notes and Attachments to be sent to Supplier

Note to all Suppliers This is an external note.

Attachments for all suppliers [Add](#)

- The Add Attachments box will open. Click **Select Files**.



Add Attachments

Attachment Type File Link

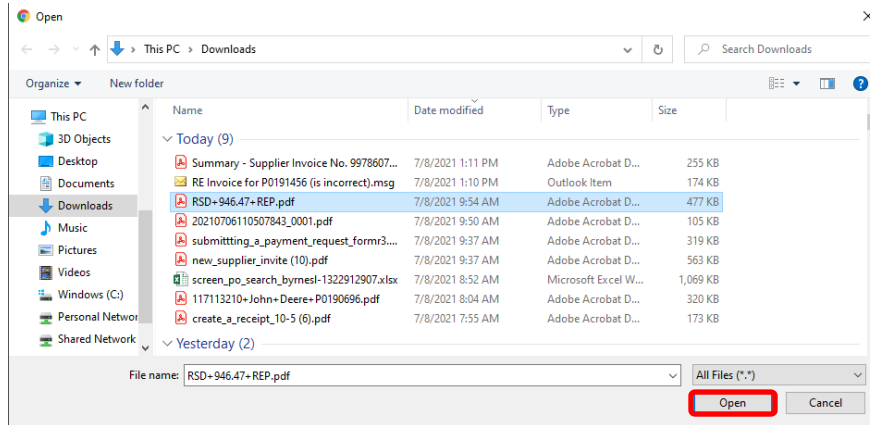
File(s) ★ [SELECT FILES...](#) *Drop files to attach, or browse.*

Maximum upload file size: 28.61 MB

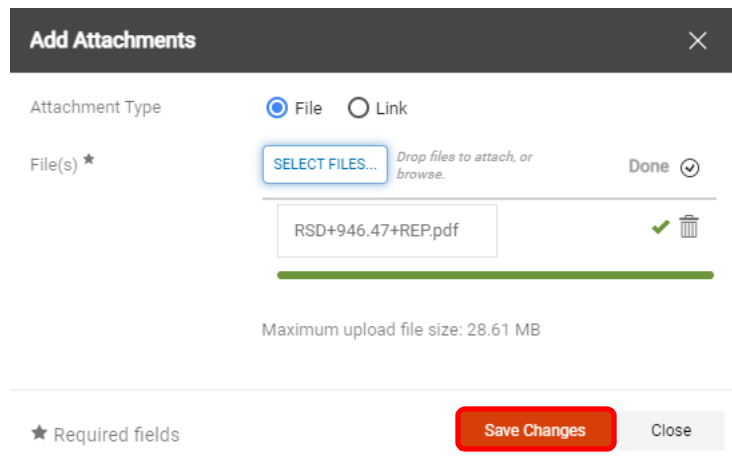
★ Required fields [Save Changes](#) [Close](#)

Checkout Process

- This will open the file explorer on your computer. Select the attachment you wish to add, then click **Open**.



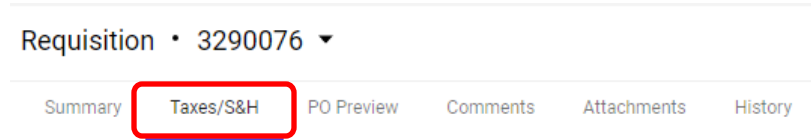
- Once the document has loaded, click **Save Changes**.




Checkout Process

Adding Shipping/Handling Charges

1. To add shipping or handling charges to an order, click the **Taxes/S&H** tab along the top menu.



2. To add shipping or handling charges to the entire order, select the  icon in the upper right hand corner.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Line 1			1,000.00	1	1,000.00
Taxable ×			Shipping	0%	0.00
			Handling	0%	0.00
			Tax	0%	0.00
			Tax2	0%	0.00
			Shipping	0%	0.00
			Handling	0%	0.00
			Total		1,000.00

3. Navigate to either the shipping or handling field, click the **Use Default** box, and then select **Override**.



4. Enter the shipping or handling charge in the **Per PO** field. Click the checkmark at the top to save the amount.

Tax 0 %

Tax2 0 %

Shipping

per line %

per PO

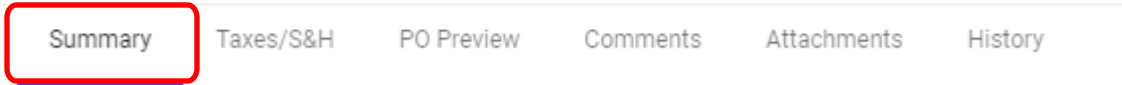
free if over

Checkout Process

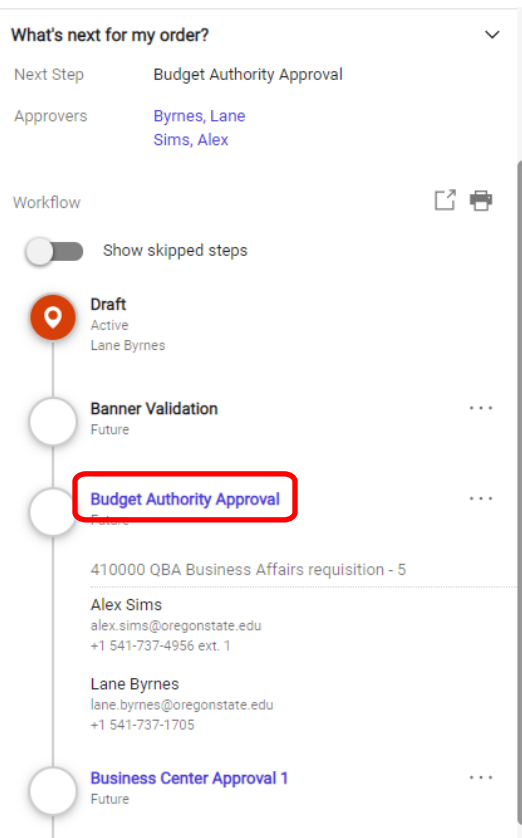
Placing Your Order

1. Prior to placing your order or assigning your cart, review the order to make sure it looks correct. Some common fields to check include shipping/billing addresses, accounting codes, notes and attachments, and line items being ordered. These can all be viewed on the **Summary** tab along the top menu.

Requisition • 3290076 ▾





2. If you are curious if any approvals are required before your purchase order is created, the approval workflow can be viewed in the What's Next for My Order? Field along the right hand side. If you would like to view the approvers for a certain approval step, click on the approval step name.

A vertical panel titled 'What's next for my order?' with a dropdown arrow. It shows the 'Next Step' as 'Budget Authority Approval' and 'Approvers' as 'Byrnes, Lane' and 'Sims, Alex'. Below is a 'Workflow' section with a 'Show skipped steps' toggle. The workflow steps are: 'Draft' (Active, Lane Byrnes), 'Banner Validation' (Future), 'Budget Authority Approval' (Future, highlighted with a red box), and 'Business Center Approval 1' (Future). At the bottom, contact information for Alex Sims and Lane Byrnes is provided.

What's next for my order? ▾

Next Step Budget Authority Approval

Approvers Byrnes, Lane
Sims, Alex

Workflow  

Show skipped steps

Draft
Active
Lane Byrnes

Banner Validation
Future

Budget Authority Approval
Future

410000 QBA Business Affairs requisition - 5

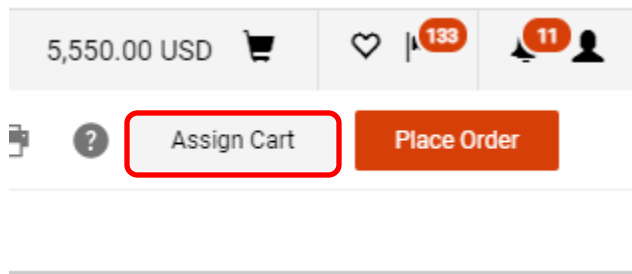
Alex Sims
alex.sims@oregonstate.edu
+1 541-737-4956 ext. 1

Lane Byrnes
lane.byrnes@oregonstate.edu
+1 541-737-1705

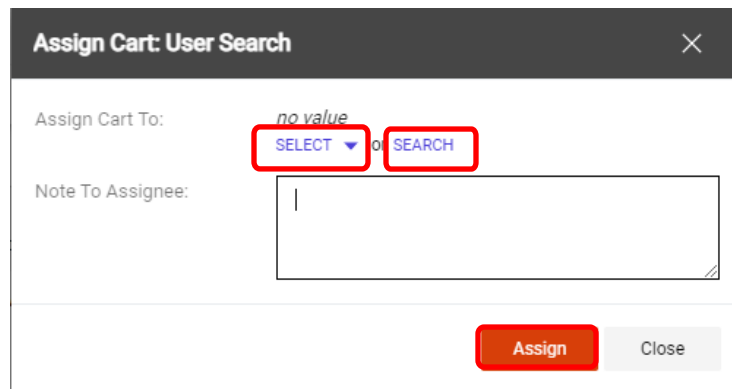
Business Center Approval 1
Future

Checkout Process

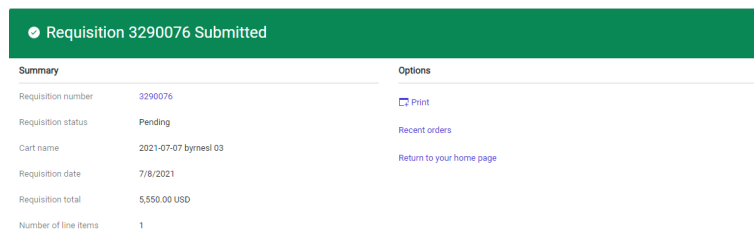
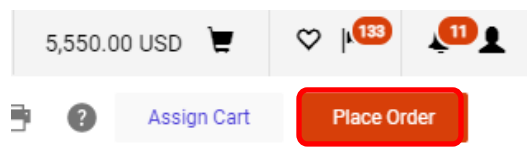
- If you are a shopper, you can assign your cart by clicking the Assign Cart button in the upper right hand corner.



- The Assign Cart box will appear. Click the **Select** tab to select users saved in your profile, or the **Search** tab to search for a user. Enter a note in the Note to Assignee field if desired, then click **Assign**.



- If you are a Requestor, click the **Place Order** button. The system will route the document for approvals (if any are required) and the purchase order will be created.



Checkout Process