OpsBuyer Quick Steps

How to link an Offline vendor

1. Click on the **Vendors** icon
2. Choose **Property Vendor Directory**
3. Click the filter drop down arrow on the right.
4. Change the Vendor Type to Offline and the Status to Inactive
5. Type in the vendor name or vendor code
6. Click **Search**
7. Place a check mark in the box next to the correct vendor name and vendor code that matches the invoices you receive
8. Enter the account number for your property
9. Click **Save**

How to link an Online vendor

1. Click on the **Vendors** icon
2. Choose **Property Vendor Directory**
3. Click the **Manage Account #** button
4. Type the vendor name in the top blank box
5. Hit Enter (to search)
6. Place a check mark next to the vendors name
7. Click **Add>**
8. Click **Submit Request**

Online Orders – Product Catalog

1. Click the **Storefront** icon
2. Scroll through the **Shop By Category** section
3. Click the category to display the available products
4. Click **Add to Cart** for the product you want to order
5. Click the **Shopping Cart** button when ready to proceed
6. Click **Proceed to Check Out** when ready to proceed
7. Enter in necessary GL Codes and unit numbers
8. Click **Review Your Order**
9. Review your order for accuracy
10. Click **Submit Your Order** to complete the order process
11. You will see a successful message and the WTN

Online Orders – Quick Order Form

1. Click the **Storefront** icon, select **Quick Order**
2. Enter the quantity (**QTY**), indicating how many you want to order and **SKU** for the items you want to order
3. Click on **Find Product**
4. The application will return the results for the items you want to order
5. Click **Add All to Cart**.
6. Click **Proceed to Check Out**
7. Enter in the necessary GL Codes and unit numbers
8. Click **Review Your Order**
9. Review your order for accuracy
10. Click **Submit Your Order** to complete the order process
11. You will see a successful message and the WTN

Create Shopping Lists

1. Follow the steps from Online Orders – Product Catalog to add items to your shopping cart (steps 1-5).
2. Click **View Full Cart**
3. Click the **check box** next to the item(s) you want to add to a shopping list.
4. Click on **Add to List.**
5. Add the items to an existing list or create a new shopping list.
6. Click **Choose**.
7. To retrieve your shopping list click on the **Storefront** icon and select **Shopping List**

Share Shopping List

1. From the **Storefront** menu select **Shopping Lists**
2. Check the box next to the list you'd like to share
3. Click **Share**
4. Enter the email address(es) separated by a comma for the individuals you want to send the shopping list to

Online Order Splitting

1. Follow the steps in **Online Orders – Product Catalog Orders** through to **Step 6**
2. At this screen click **Split All** to allocate the order to multiple properties. (You can click **Split** at the specific line item to allocate one line item to multiple properties.)
3. Enter the **Ratio** to indicate how to split the order and click **OK**
4. Enter the **Ratio** for how you want to split the expense
5. Resume following **Step 7** from Online Orders – Product Catalog Orders.

Offline Orders

1. From the **Storefront** menu select **Create Offline Order**
2. Enter the Supplier – type in supplier name and tab or **click** on the word **Supplier…** to open the supplier search and box, then select the supplier
3. Enter in line item details for products/services you need to order:
   a. Quantity
   b. Product Description
   c. SKU
   d. Unit Price
   e. GL Code
   f. Unit #
4. Enter in tax and shipping if necessary
5. Enter order grand total
6. Click the **Check Budget** button to see where you are against budget, enter any notes if necessary
7. Click **Save**

Offline Order Splitting

1. Follow the steps in **Offline Orders** through **Step 3**
2. Click **Split All** to allocate the order to multiple properties. (You can click **Split** at the specific line item to allocate one line item to multiple properties.)
3. Enter the ratio per property to indicate how to split the order can click **OK**
4. Resume following **Step 4** from Offline Orders

Create Recurring Orders

1. From the Order Menu, select **Recurring Orders**
2. Click **Create Recurring Order**
3. Enter the supplier – type in supplier name and tab or click on the word **Supplier…** to open the supplier search box
4. Enter title for recurring order in Description Field and define the schedule
5. Enter line item details for products/services you need to order:
   a. Quantity
   b. Product/Service
   c. Unit Price
   d. GL Code
   e. Unit#
6. Enter tax and shipping if necessary
7. Enter grand total
8. Click **Save**

** To Review your recurring orders:
1. From the Order menu, select **Recurring Orders**

** To cancel a recurring order:
1. From the Order menu, select **Recurring Orders**
2. Click Update next to the order you want to cancel
3. Check the box at the bottom of the page under Cancelled

Order/WTN Search

1. From the Order Menu, select **Order Summary.**
2. Enter the criteria in the given filters to find the WTN(s) you need to review.

Order Approvals

1. From your dashboard click **View** next to the **Orders** under the **Pending Approvals** section
2. Click the **double arrow icon** next to the WTN to open the details of the order
3. Click on **Check Budget** to see where the property is against budget
4. Review and make changes to (if necessary):
   a. GL Code
   b. Unit #
5. Select your action:

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   a. Save
   b. Approve
   c. Endorse (this option might not be available)
   d. Reject
6. Click **Process Order**

Voiding Orders

1. Look up the WTN following the steps outlined in **Order/WTN Search**
2. Check the box next to the WTN you wish to void
3. From the Action dropdowns, select **Void Selected**

How to link an Order (WTN) to an Invoice

1. Open the invoice and click **Link** next to the WTN field
2. Select the appropriate WTN in the pop up box and click **OK**. If you don't see the WTN you need, you may want to change the Status box in the upper right to show **ALL**
3. If you need to see the detail of the available WTN's in order to select the correct one, click on the underlined WTN
4. If you have an invoice that won't link to the WTN there are two things to check for:
   a. Is the offline version of the vendor linked to your property
   b. Does the vendor code on the invoice match the vendor code on the order? You may have accidentally created the offline order using a different vendor code that the invoice came in as. If the two don't match the system won't allow you to link the invoice and WTN.

Invoice ROG Approvals

1. From the dashboard click **View** in the **Invoice Pending Receipt of Goods (ROG)** section
2. Click on an **Invoice #** to load the invoice details
3. Link the WTN to the invoice
4. Enter/Update GL codes and unit #'s and verify invoice is okay to pay
5. Click **ROG Approve**

Invoice Splitting

1. From the dashboard click **View** in the **Invoice Pending Receipt of Goods (ROG)** section
2. Click **Split All** to allocate the invoice to multiple properties. (You can click **Split** at the specific line item to allocate one line item to multiple properties.)
3. Enter the ratio to indicate how to split the invoice and click **OK.**
4. Resume following **Step 3** from Invoice ROG Approvals

Invoice Approvals

1. From your dashboard click **View** next to the **Invoices** under the **Pending Approvals** section
2. Click the **double arrow icon** next to the invoice number to open the details of the invoice
3. Click on **Check Budget** to see where the property is against budget
4. Review and make any changes to:
   a. GL Code
   b. Unit #
5. Select your action:
   a. Save
   b. Approve
   c. Endorse (this option might not be available)
   d. Reject
   e. No Action
6. Click **Process Invoice.**

Dispute an Invoice

1. From the dashboard click **View** in the **Invoice Pending Receipt of Goods (ROG)** section
2. Click on an **Invoice #** to load the invoice details
3. From the More Actions… Menu, select **Dispute**
4. Enter a reason for the dispute in the pop up box and click **OK**

To clear a dispute, open the invoice, from the More Actions menu…click **Clear Dispute

Voiding Invoices

1. From the dashboard click **View** in the **Invoice Pending Receipt of Goods (ROG)** section
2. Click on an **Invoice #** to load the invoice details
3. In the **Void Notes** box, enter a reason for voiding the invoice
4. From the More Actions…Menu, select **Void**

Invoice Search

1. From the Invoice Menu, select **Invoice Summary**
2. Enter the criteria in the given filters to find the invoice(s) you need to review

Track an Asset From an Invoice

1. Open the invoice that contains the asset you wish to track
2. Click **More Actions**, **Track Assets**
3. Click **Edit** next to the asset
4. Fill out all the field (SKU, Description, serial #, etc) and click **Save**
5. To add warranty information, select the **Warranty tab**
6. Enter all the warranty information and click **Save**

Track an Asset Manually

1. On the **Setup** menu, select **Asset Tracking**
2. Click **Add Asset**
3. Fill out all the field (SKU, Description, serial #, etc) and click **Save**
4. To add warranty information, click **Edit** next to the asset and select the **Warranty tab**
5. Enter all the warranty information and click **Save**

Transfer an Asset

1. On the **Setup** menu, click **Asset Tracking**
2. Search for the asset you need and click **Edit**
3. Make the unit number change and click **Save**

Retire an Asset

1. On the **Setup** menu, click **Asset Tracking**
2. Search for the asset you need and click **Edit**
3. Uncheck the Active box and click **Save**

Run the Asset Tracking Report

1. From the **Reports** menu, select OpsBuyer Reports
2. Choose the **Asset Tracking** report
3. Fill in the filters you wish to run for the report
4. Click **Run Report**
5. You can Export the Report to Excel, or Print to PDF for additional viewing

Adding Offline Paper Invoices (or Credit Memos) to Ops

1. From the Invoice menu select **Create Offline Invoice (or Create Offline Credit Memo)**
2. Enter the Supplier – type in supplier name and tab or **click** on the word **Supplier…** to open the supplier search and box, then select the supplier that matches the invoice remit to address
3. Enter the Invoice number (or Credit Memo #) and Invoice Date exactly as it appears on the invoice
4. Click the Upload button to upload a copy of the invoice you received
5. Complete the Qty, Description, and Unit Price fields as they appear on the invoice. Enter credits as positive numbers.
6. Enter your GL Code, Unit #, and Project Code if needed
7. Be sure to enter Shipping, Tax, and the Grand Total to match the paper invoice
8. Click **Save** to process the invoice

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If your company uses OpsInvoice:

Uploading Paper Invoices to Ops

Should a vendor send a paper invoice to the property, the property should upload the invoice to Ops for processing.

1. Go to **Invoices**, click **Invoice Processing Image Box**
2. Click **New**
3. Click **Upload** and choose the file that contains your invoice image(s) – files must be in PDF, JPG, JPEG, TIFF, or TIF format.
4. Enter the # of invoices you are uploading in the Invoice Count box.
5. Enter notes if you desire, then hit **Save**.

Access OpsInvoice Exception Queue/Pending Review

1. From the Invoice menu select **OpsInvoice Exception Queue** or click on the **Pending Review** section of the dashboard.
2. A new window will open for OpsInvoice and you will be able to see all invoices that need to be addressed in order for the data entry to be completed.
3. Within the data entry section, select note and type in a response to the question.
4. Update the invoice status to **Pending QC.**
5. Click **Save Invoice**, or **Void** if it doesn't need processing.

Terms You Need to Know

Supplier Types

Managed Catalog Supplier: This supplier is a fully integrated supplier that is 1) able to receive orders electronically where properties have placed an online order in OpsBuyer using the catalog, and 2) submit the invoice back through electronically, automatically linking the WTN to the invoice. This supplier is also referred to as an "online" supplier.

E-Invoice Supplier: This supplier cannot accept orders online in OpsBuyer, but does have the capability to submit invoices electronically in OpsBuyer, thereby eliminating the paper process. This supplier is referred to as an "online" supplier since they must be enabled electronically in OpsBuyer before they can submit electronic invoices to a property. However, you will need to create an offline order for this type of supplier.

Paper Supplier: This supplier cannot receive orders electronically through Ops, nor can they submit electronic invoices. This supplier mails a paper invoice, which then has to be keyed into OpsBuyer by the property, or by OpsInvoice if your company uses OpsInvoice. You will need to create an offline order for this type of supplier as well.

Order Types

Offline: This means the order was placed directly with the supplier outside of OpsBuyer, usually by phone, sales rep, emailing, faxing, or in person. This applies to Electronic Invoice and Paper suppliers.

Online: This means the order was placed directly with the supplier using the catalog within OpsBuyer. This only applies to Managed Catalog suppliers.

Miscellaneous

WTN: The workflow tracking number (WTN) is equivalent to a purchase order (PO) number.

Product Configurator: The product configurator is used to place online orders with service providers that require additional information in order to fulfill an order. (For instance, when ordering carpet, appliances, paint, or custom blinds).

ROG Approve: Receipt of Goods (ROG) approval indicates the items were received and the correct price is on the invoice.

OpsBuyer Best Practices

Check your orders carefully. Before you click the Check Out button, make sure you are not ordering something you don't need. Adding something to your cart by mistake and having to return it after it arrives get costly for the supplier. When supplier costs go up, so do yours. Being diligent before placing the order helps keep prices low.

Be mindful of minimum order amounts.

Consolidate. Try to consolidate your orders whenever possible. A property should not have to place multiple orders with the same supplier on the same day. The more orders you have the more invoices you have to track and approve. Consolidating will save both you and the supplier time and money! You can always keep a running order by saving your shopping cart throughout the day when you add items, then check out once at the end of the day.

Keep your dashboard clean. Don't forget to check your Disputed items and Rejected items on a weekly basis and remove any you no longer need. No disputed or rejected invoice should remain on the dashboard longer than 30 days.

Approve your invoices in a timely manner. All invoices that appear in Ops needing ROG Approval should be approved as quickly as possible. This ensures there is sufficient time for the check to be printed and mailed to the supplier within the 30 day net terms most vendors require. Standard practice is to ROG Approve all invoices within 3 days of receipt.

Order online. If the supplier you wish to order from is online as a managed catalog supplier, then order from them online through the catalog. You should not call in orders to those suppliers unless it is an emergency.

Check your open orders. Orders should not remain open for longer than 60 days. If an order is open for longer than that, it usually signals a missing order or a missing invoice. Check this often and communicate with the supplier if you are missing something. Keeping your open orders controlled also helps keep your budget numbers accurate.

Review your statements. Statements are an important tool to let you know if the supplier is missing payment. Reviewing your statements regularly will help you eliminate past due charges or keep you from accruing late fees.

Use Out of Office. If you plan to be out of the office for any length of time, don't forget to turn on your "out of office". This keeps orders and invoices in workflow from sitting on your dashboard awaiting approval. If you turn on Out of Office and an order or invoice routes to workflow, it will automatically route to the next person in line which speeds the process for approval. You can set this feature by clicking the arrow beside your name in the top right corner of the screen.