

## Job Aid: How to Purchase from a COMMBUYS (G2B) Punchout

### This Job Aid shows how to:

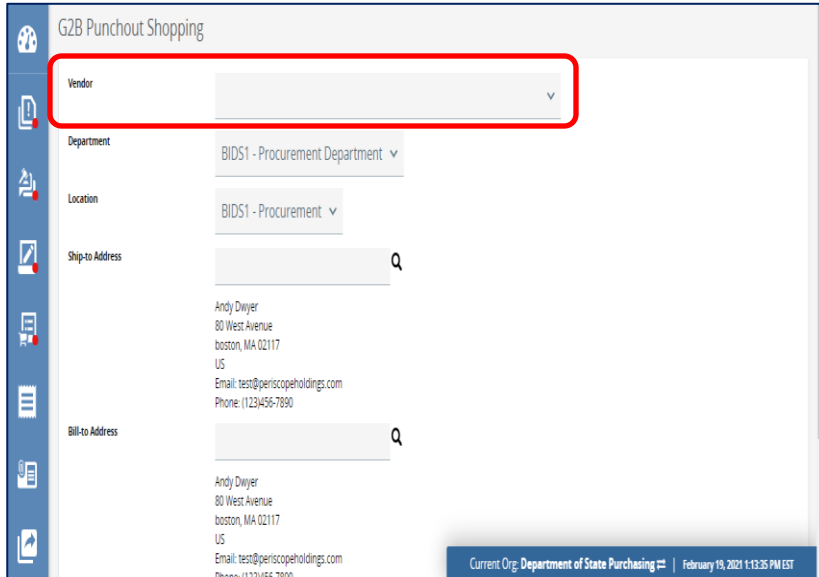
- Create a requisition and purchase order using the Punchout G2B (Government to Business) functionality in COMMBUYS.

### Of Special Note:

A COMMBUYS punchout provides the ability to purchase directly from the website of certain sellers (vendors). Punchouts are integrations developed with specific sellers that allow you to start a Requisition in COMMBUYS. Buyers can 'punch out' to a seller's online shopping website to search for and choose the desired items. Once items are selected and checked out, the system transfers these items to COMMBUYS to complete a release requisition.

**NOTE: Be sure to turn off your computer's Pop up Blocker, otherwise the vendors site will not display.**

Screenshot	Directions
 A screenshot of the COMMBUYS dashboard. The top navigation bar includes the COMMBUYS logo, a search bar, a 'Catalog' dropdown, and an 'Advanced' search button. On the right side of the navigation bar, there are several icons: a notification bell with '13', a gear icon for settings, a question mark, and a user profile icon. A dropdown menu is open from the settings gear icon, showing options: 'Reports', 'Vendor Notification', 'G2B Punchout', and 'Change User(s)'. The 'G2B Punchout' option is highlighted with a red box. Below the navigation bar, the dashboard features several colored tiles: an orange tile for 'Document(s) Ready for Approval' (0), a green tile for 'Requisition(s) Ready for Purchasing' (1), a red tile for 'Bid Solicitation(s) Ready to Send' (4), another red tile for 'Bid Solicitation(s) Ready to Open' (3), and a purple tile for 'PO(s) Ready' (1). There are also sections for 'News' and 'Recent Documents'.	<p><b>Step 1: Accessing the Punchout Page</b></p> <ol style="list-style-type: none"><li>1. After logging into COMMBUYS, click on the <b>Settings</b> icon at the top right side of the page.</li><li>2. Select <b>G2B Punchout</b> from the dropdown menu.</li></ol>



### Step 2: Choosing a Vendor

The **G2B Punchout Shopping** page displays.

1. Click on the **down arrow** next to the **Vendor** field then select the desired vendor from the dropdown menu.
2. Ensure that the default **Department** and **Location** fields are correct for this order. If not, they can be changed by clicking on the **down arrow** and selecting another choice.
3. Ensure that the default **Ship-to Address** and **Bill-to Address** are correct for this order. If not, they may be changed by clicking on the **magnifying glass icon** and selecting another address.

**NOTE:** These departments, locations, and addresses cannot be changed once you continue from this page. Punchout requisitions cannot have different Ship-to or Bill-to addresses by line item. All items on a punchout must have the same Ship-to and Bill-to.

4. Click on the **Punchout** button at the bottom of the page.

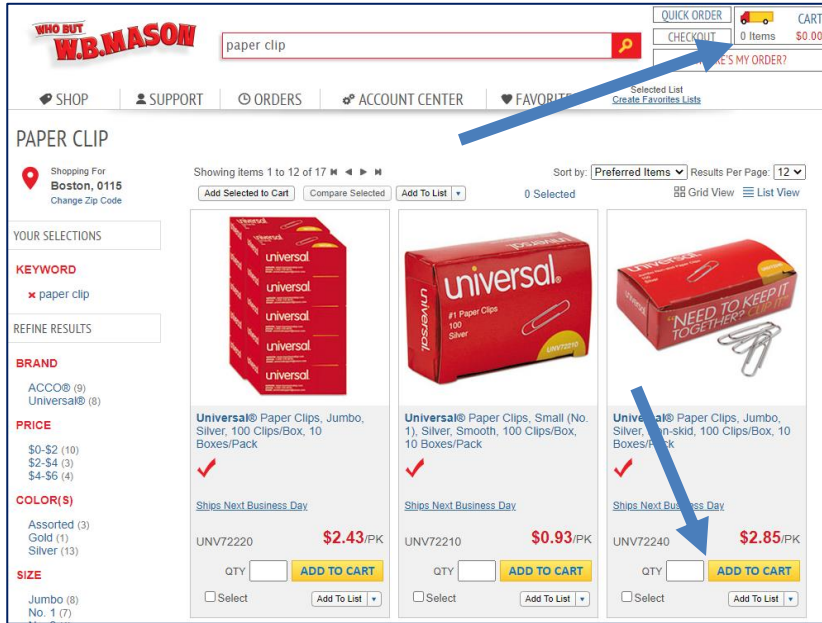


### Step 3: Selecting Items

**NOTE:** Punchout Catalogs are unique for each vendor, so the following steps may vary.

The selected seller's website is similar to their public website however it will contain Statewide contract items and pricing.

1. Enter a keyword in the **Search** box at the top of the page, OR
2. Select the desired **items category** (in this example, click on **Shop**) and continue selecting sub-categories (if necessary) until you locate the desired item(s).

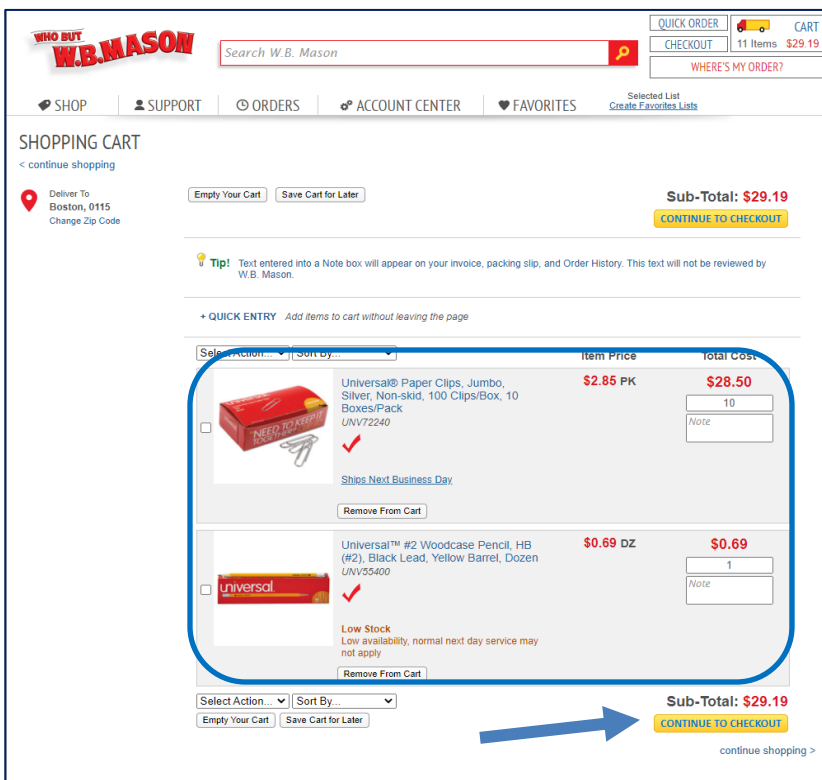


**Step 4: Adding Items**

1. Choose the desired item and enter the **quantity** to be ordered.
2. Click on the **Add to Cart** button.

**NOTE:** a popup window may display the item you just added to the shopping cart. If so, close the window and proceed.

3. Repeat **this process** to add additional items.
4. Once you have chosen all items, click on the **Cart icon** to begin the checkout process.



**Step 5: Reviewing the Shopping Cart**

1. Review the items, quantities, and prices, then click on the **Continue to Checkout** button.

**NOTE:** This button may be called something else depending on the vendor's website, for example, **Checkout, Proceed to Checkout, Complete Checkout, Return to Buying Application, Transfer Shopping Cart,** and so on.

**NOTE:** Changes cannot be made to your items once you leave this page.

Release Punchout Requisition RQ-21-1990-BIDS1-BIDS1-301615 Status: 100 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number: **RQ-21-1990-BIDS1-BIDS1-301615** Short Description: G2B from (v. name)

Status: 100 - In Progress Fiscal Year: 2021

Department: BIDS1 - Procurement Department Organization: Department of State Purchasing

Location: BIDS1 - Procurement Solicitation Enabled:

Required By Date:  Entered Date: 02/22/2021

Requisition Type: Release Type Code:

Requestor: Bill O'Malley 'S Purchase:

Contract:  Contract Phone:

Alternate ID:  Tax Rate:

Estimated Cost: \$29.19

Print Format: \* Requisition Print

Special Instructions:

Date Last Updated: 02/22/2021 10:42:59 AM User Last Updated: Bill O'Malley 'S

Save & Continue

### Step 6: Completing the Requisition

1. Following checkout, a Release Punchout Requisition is created and the **General** tab page displays. The **Short Description** field at the top right displays a generic description **“G2B from (vendor’s name)”**. Since this is a searchable field, this generic description must be changed to something unique that will enable you to differentiate this order from all other orders placed with this Punchout vendor.

You may also add:

- **Alternate ID:** Enter information as required. This may include (but is not limited to) data such as a Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or an In-house financial system transaction number for non-MMARS users.
  - **Special Instructions:** Enter information as required. This may include (but is not limited to) data such as shipping drop off information, locations, etc. (50-character limit).
2. After changing the Short Description field, click on the **Save & Continue** button at the bottom of the page.

Release Punchout Requisition RQ-21-1990-BIDS1-BIDS1-301615 Status: 100 - In Progress

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

Sort by Column: Print Sequence  Sort Descending

Item #	Units	Print Sequence	Quantity	Minimum Order Quantity	Casing/Print Unit Cost	Net Unit Cost	LOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Responsible
1	Mazez Banker#   Line # PO-19-1000-02003-SMCS-15900   1	1.0	Page-Cops, Jumbo, Non-stick, 100 Cops/Bov. 11 Boxes/Pack	100	0.0	\$2.95	\$2.95	PK - Pack	\$0.00	\$0.00	\$29.50	<input type="button" value=""/>
2	Mazez Banker#   Line # PO-19-1000-02003-SMCS-15900   1	2.0	# Woodzoo Percil, HD HD, Back Load, Yellow Barrel, Dozen	1.0	0.0	\$9.69	\$9.69	DC - Dozen	\$0.00	\$0.00	\$9.69	<input type="button" value=""/>
<b>Total</b>											\$29.19	

### Step 7: Checking the Items Tab

1. Click on the **Items** tab. Ensure that all items and quantities are correct.
- NOTE:** You will not be able add or delete items or change quantities. If an error has been made, you must initiate a new Punchout order.
- NOTE:** The **Vendors** and **Address** tabs have automatically been populated.

Release Punchout Requisition RQ-21-1990-BIDS1-BIDS1-301615 Status: 10 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes **Requisitions** **Summary**

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**Header Information**

<b>Requisition Number:</b> RQ-21-1990-BIDS1-BIDS1-301615	<b>Short Description:</b> Office supplies for Bldg B	<b>Status:</b> 10 - In Progress
<b>Organization:</b> Department of State Purchasing	<b>Location:</b> BIDS1 - Procurement	<b>Required By Date:</b>
<b>Department:</b> BIDS1 - Procurement Department	<b>Requisition Type:</b> Release	<b>Type Code:</b>
<b>Entered Date:</b> 10/22/2021	<b>Purchaser:</b>	<b>Fiscal Year:</b> 2021
<b>Requestor:</b> Bill O'Malley 'S	<b>Contact Phone:</b>	<b>Alternate ID:</b>
<b>Contact:</b>	<b>Estimated Cost:</b> \$33.19	<b>Price Format:</b> Requisition Price
<b>Hoard Enabled:</b> No	<b>Bill-to Address:</b> Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: ted@percipetadings.com Phone: (214)657-7000	
<b>Solicitation Enabled:</b> No		
<b>Invoice Method:</b> Three Way Match		
<b>Ship-to Address:</b> Andy Dwyer 80 West Avenue Boston, MA 02117 US Email: ted@percipetadings.com Phone: (214)657-7000		

**Special Instructions:**

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**Attachments**

Agency Files:  
Agency Forms:  
Vendor Files:  
Vendor Forms:

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**Item Information**

**Step 8: Reviewing the Summary Tab**

1. Click on the **Summary** tab.
2. Review the Summary tab and ensure that all fields are correct. No changes can be made to these tab pages, and a new Punchout must be initiated if errors are found.
3. Click on the **Submit for Approval** button at the bottom of the page.

**Step 9: Submitting for Approval**

The approval path will display, or you're given the option to select the appropriate one.

**NOTE:** The requisition will now proceed through your department's approval path (no image is provided here as your approval path will vary). You will be informed by COMMBUYS email when the approval is complete.

1. If you do not have approval paths set up in your agency, select the **Automatic Approval** radio button.

2. Click on the **Save and Continue** button and note that the status at the top right of the page will change from **In Progress** to **Gone to PO**.

**NOTE:** Be sure to follow your department's approval procedures and approval paths.

Once you have an approved Requisition, a Purchase Order is created and automatically sent to the vendor for processing. You will receive a PO Sent email alert from COMMBUYS. To view the PO, click on the **New Purchase Order** is hyperlink in the yellow **System Warning(s)** box.

Release Punchout Requisition RQ-21-1990-BIDS1-BIDS1-301629

Status: **IRI - In Progress**

No approval path meets the document criteria. Do you want to manually add approvers or mark the document as approved?

Manually add approvers

Automatic approval

Please select an approver if you want to manually add approvers.

Approver: [Dropdown] Add Approver

Save & Continue Cancel & Exit

Release Punchout Requisition RQ-21-1990-BIDS1-BIDS1-301615

Status: **IRP - Gone to PO**

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

**System Warning(s)**

New Purchase Order: [PO-19-1990-02019-05C3-1990111713](#)

**Header Information**

<b>Requisition Number:</b>	RQ-21-1990-BIDS1-BIDS1-301615	<b>Short Description:</b>	Office supplies for Bldg. B	<b>Status:</b>	IRP - Gone to PO
<b>Organization:</b>	Department of State Purchasing	<b>Location:</b>	BIDS1 - Procurement	<b>Required By Date:</b>	
<b>Department:</b>	BIDS1 - Procurement/Department	<b>Requisition Type:</b>	Release	<b>Type Code:</b>	
<b>Entered Date:</b>	02/22/2021	<b>Purchaser:</b>		<b>Fiscal Year:</b>	2021
<b>Requestor:</b>	Bill O'Malley/S	<b>Contact Phone:</b>		<b>Alternate ID:</b>	
<b>Contact:</b>		<b>Estimated Cost:</b>	529.19	<b>Print Format:</b>	Requisition Print
<b>Plan# Enabled:</b>	No				
<b>Solicitation Enabled:</b>	No				
<b>Invoice Method:</b>	Three Way Match				
<b>Ship-to Address:</b>	Andy Diaper 80 West Avenue Boston, MA 02117 US Email: <a href="mailto:web@procurementings.com">web@procurementings.com</a> Phone: (123)456-7890	<b>Bill-to Address:</b>	Andy Diaper 80 West Avenue Boston, MA 02117 US Email: <a href="mailto:web@procurementings.com">web@procurementings.com</a> Phone: (123)456-7890		

**Special Instructions:**