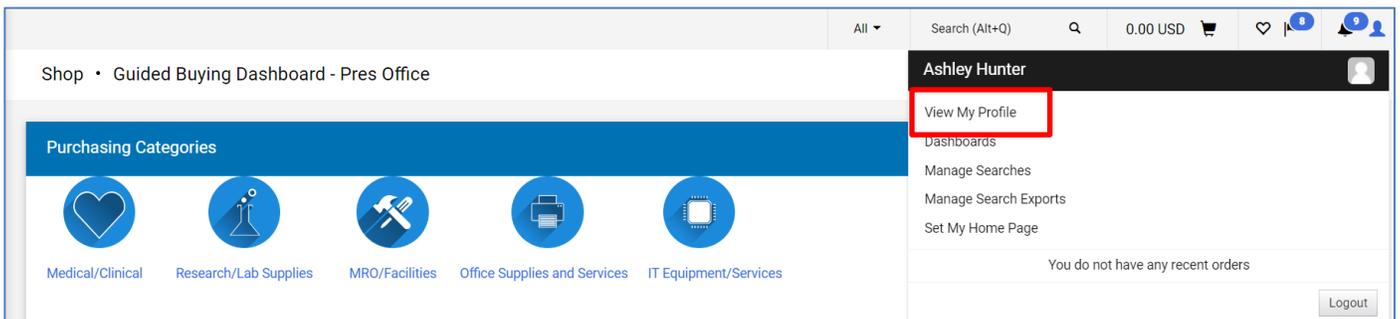
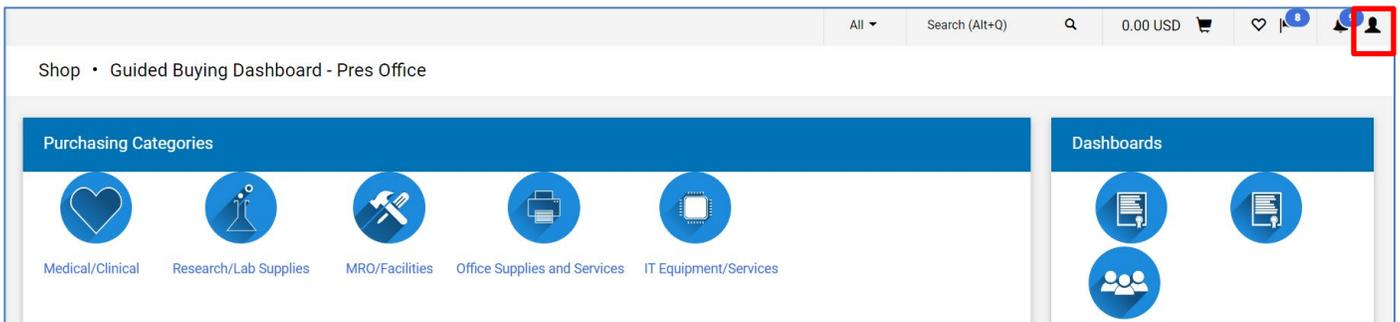


SET UP USER PROFILE

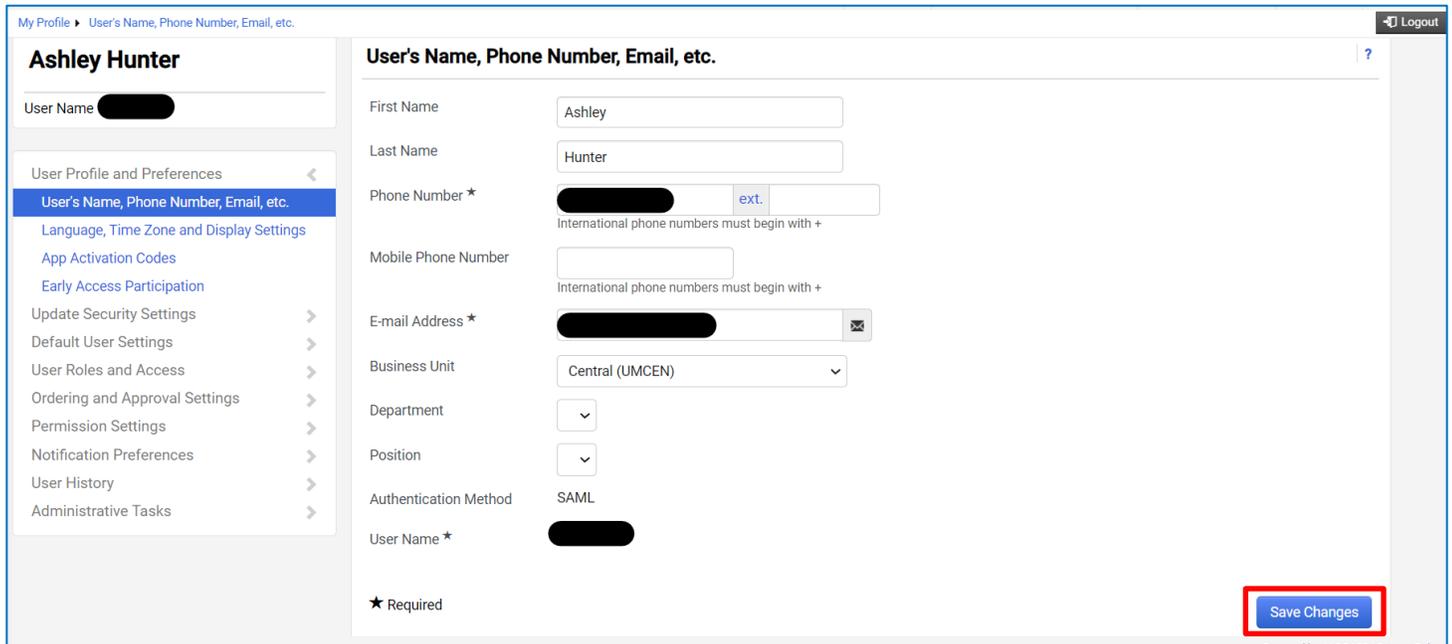
Before you begin creating transactions in BuyWays, you should review your settings and enter default options in your BuyWays profile to save time as you use the system.

1. **Access Your Profile:** From your BuyWays homepage, select the profile icon in the upper right corner, then click on 'View My Profile'.



2. **Review Your Information:** The profile page will open with your personal information on the right. Some information will be populated from your security set up. Verify that your name, employee ID, phone number, email address and campus are correct. Modify as needed, and then select **Save Changes**.

On the left side of the window, you may choose the profile setting that you'd like to modify from the menu.



My Profile ▶ User's Name, Phone Number, Email, etc. Logout

Ashley Hunter

User Name [Redacted]

User Profile and Preferences <

- User's Name, Phone Number, Email, etc. (Selected)
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

User's Name, Phone Number, Email, etc.

First Name: Ashley

Last Name: Hunter

Phone Number * [Redacted] ext. [Redacted]
International phone numbers must begin with +

Mobile Phone Number [Redacted]
International phone numbers must begin with +

E-mail Address * [Redacted] ✉

Business Unit: Central (UMCEN) ▾

Department: ▾

Position: ▾

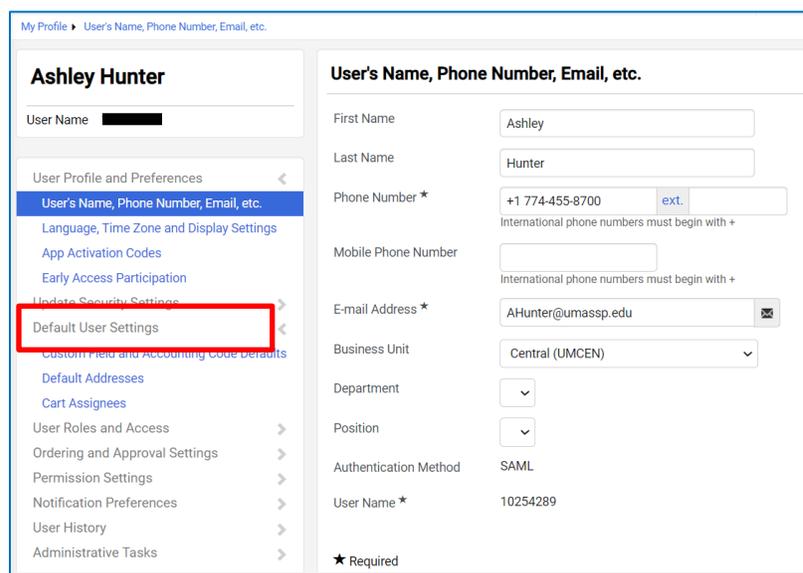
Authentication Method: SAML

User Name * [Redacted]

★ Required

Save Changes

3. **Access Your Default User Settings:** On the left side of the window, select the **Default User Settings** tab.



My Profile ▶ User's Name, Phone Number, Email, etc.

Ashley Hunter

User Name [Redacted]

User Profile and Preferences <

- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- App Activation Codes
- Early Access Participation
- Update Security Settings >
- Default User Settings** (Selected)
- Custom Field and Accounting code Defaults
- Default Addresses
- Cart Assignees
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- User History >
- Administrative Tasks >

User's Name, Phone Number, Email, etc.

First Name: Ashley

Last Name: Hunter

Phone Number * +1 774-455-8700 ext. [Redacted]
International phone numbers must begin with +

Mobile Phone Number [Redacted]
International phone numbers must begin with +

E-mail Address * AHunter@umassp.edu ✉

Business Unit: Central (UMCEN) ▾

Department: ▾

Position: ▾

Authentication Method: SAML

User Name * 10254289

★ Required

- Set Up Your Codes:** Once on 'Default User Settings' select the on Custom Field and Accounting Code Defaults. Users are encouraged to set up 'Code Favorites' to assist with requisitions. You may set one particular speedtype to appear as a default or you can enter the speedtypes you use most frequently to appear in a dropdown menu when you create a requisition

My Profile > Custom Field and Accounting Code Defaults

CI [REDACTED]

User Name [REDACTED]

User Profile and Preferences >

Default User Settings >

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

User Roles and Access >

Ordering and Approval Settings >

Permission Settings >

Notification Preferences >

User History >

Administrative Tasks >

Custom Field and Accounting Code Defaults

Codes **Code Favorites** System Administration Use Only

Custom Field Name	Default Value	Description	Edit Values
Business Unit	UMBOS	Boston	Edit
↳ Account	No Default Value		Edit
↳ Speedtype	No Default Value		Edit
↳ Fund	No Default Value		Edit
↳ Department	No Default Value		Edit
↳ Program	No Default Value		Edit
↳ Project	No Default Value		Edit
↳ SpeedType Class	No Default Value		Edit
↳ Class	No Default Value		Edit
Request Budget Override	No Default Value		Edit

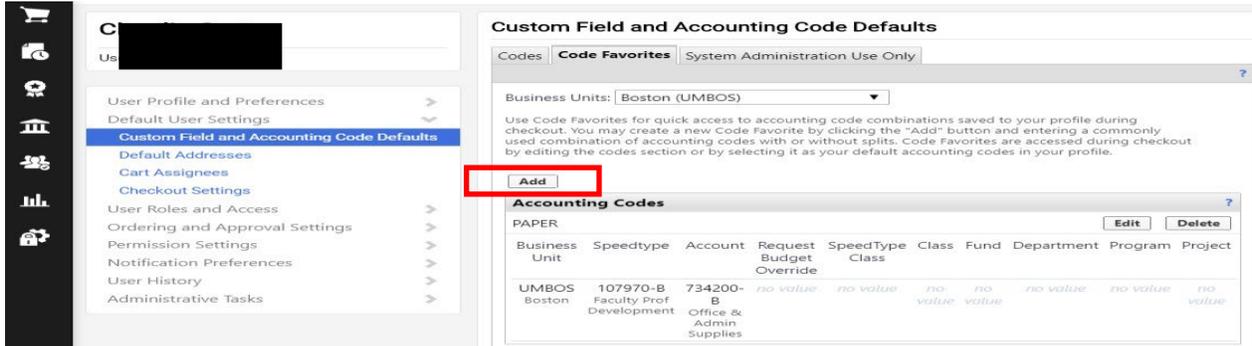
Do not make edits on 'Codes' tab. This should not be modified

Custom Field and Accounting Code Defaults

Codes **Code Favorites** System Administration Use Only

Custom Field Name	Default Value	Description	Edit Values
Business Unit	UMWOR	UMass Medical School	Edit
↳ Account	No Default Value		Edit
↳ Speedtype	No Default Value		Edit
↳ Fund	No Default Value		Edit
↳ Department	No Default Value		Edit
↳ Program	No Default Value		Edit
↳ Project	No Default Value		Edit
↳ SpeedType Class	No Default Value		Edit
↳ Class	No Default Value		Edit
Request Budget Override	No Default Value		Edit

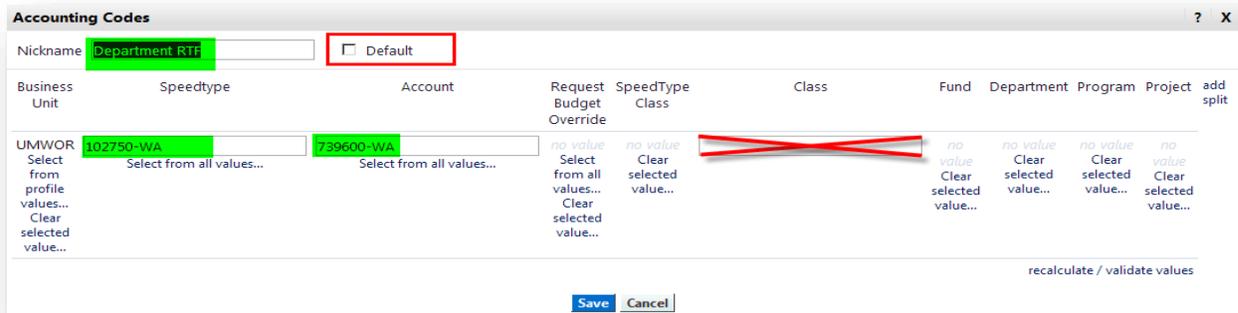
5. **Update Your Codes Favorites:** Select the 'Codes Favorites' tab, click 'Add'.



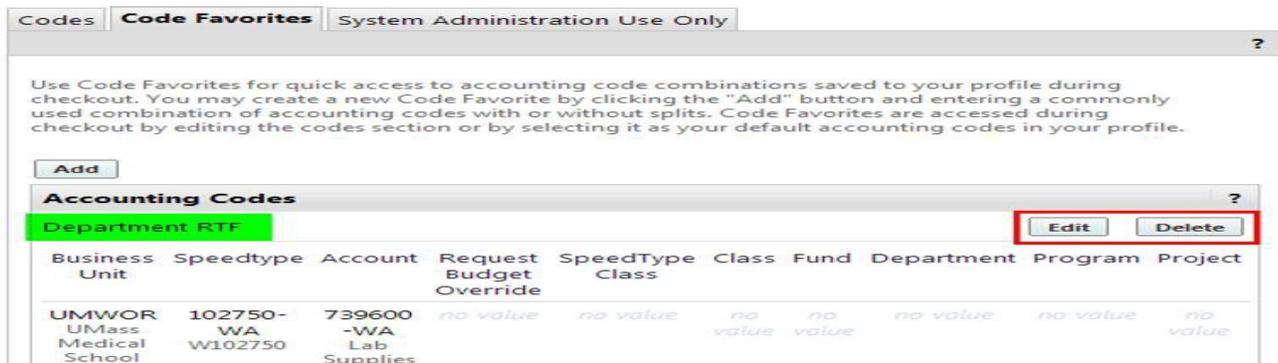
Enter a meaningful nickname for your code favorite.

You can choose to enter just the speed type number OR you can use a combination of Speed Type AND Account Number if the account will be the same for each order placed against the Speed Type. If you will use this combination for EVERY order you place, you can check the 'default' checkbox and the information will auto populate on each order. To avoid errors, choosing a default is only recommended when a single funding source is used for all of your requisitions. **Save** your code favorite.

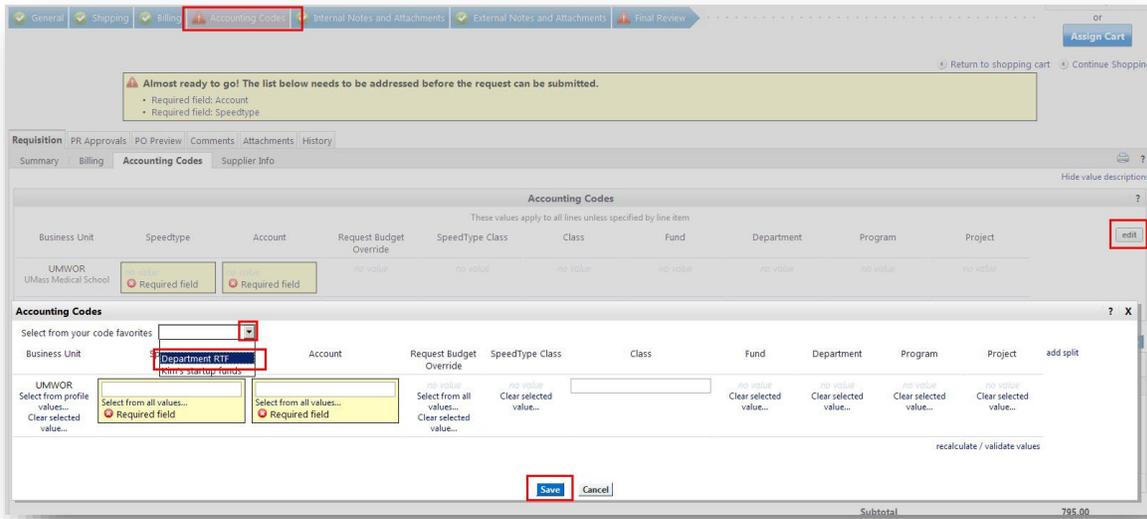
Never modify the 'Class' field – this field should always remain unfilled.



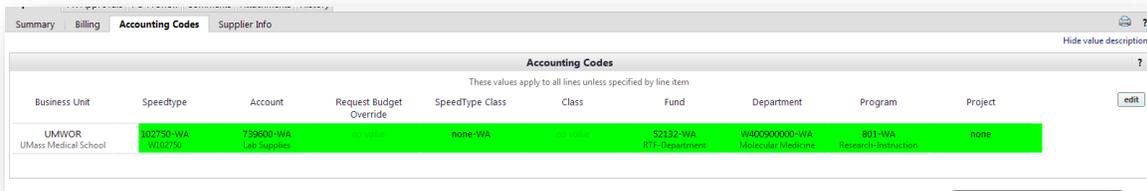
You can edit or delete a code favorite by clicking on the buttons to the right.



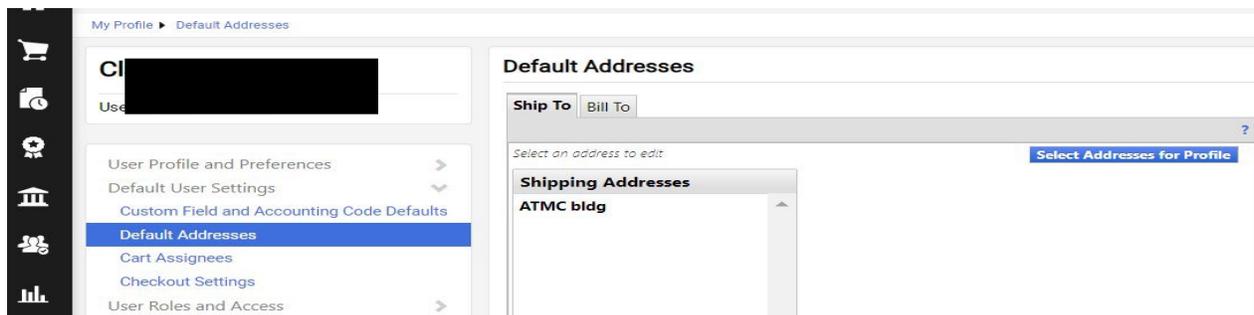
- When you enter a requisition, click 'Edit' in the **Accounting Codes** tab then go to **Select from your codes favorites**, a dropdown menu will appear, listing the nicknames you created for your speedtypes. Select the code you need, then save.



Validate the information to ensure it is correct.



- Users are encouraged to set up the Default Addresses. Having default addresses allows you to select from a customized short list when creating requisitions instead of having to search for an address on each.

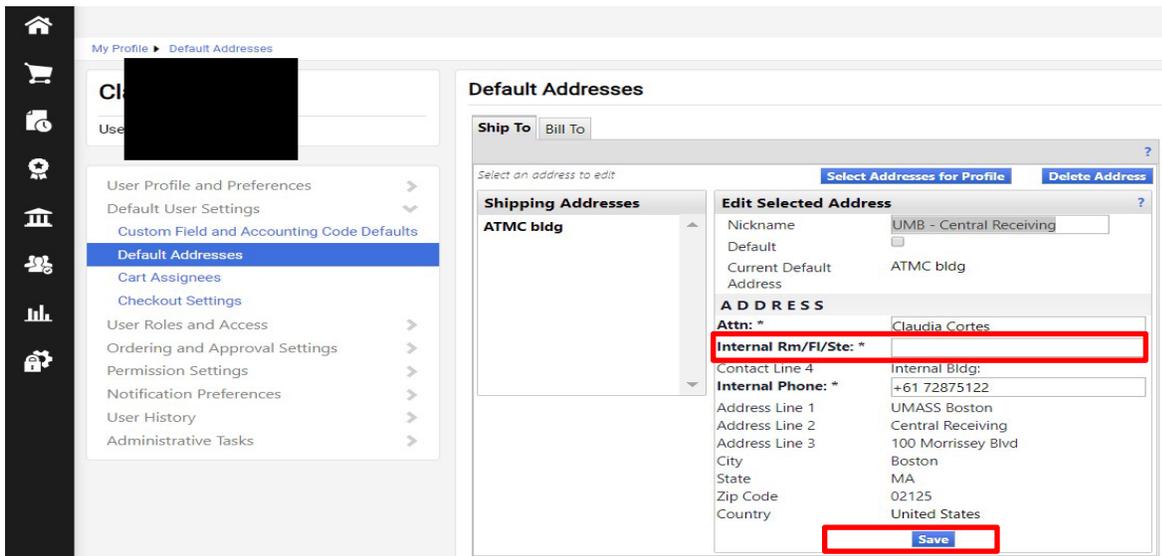
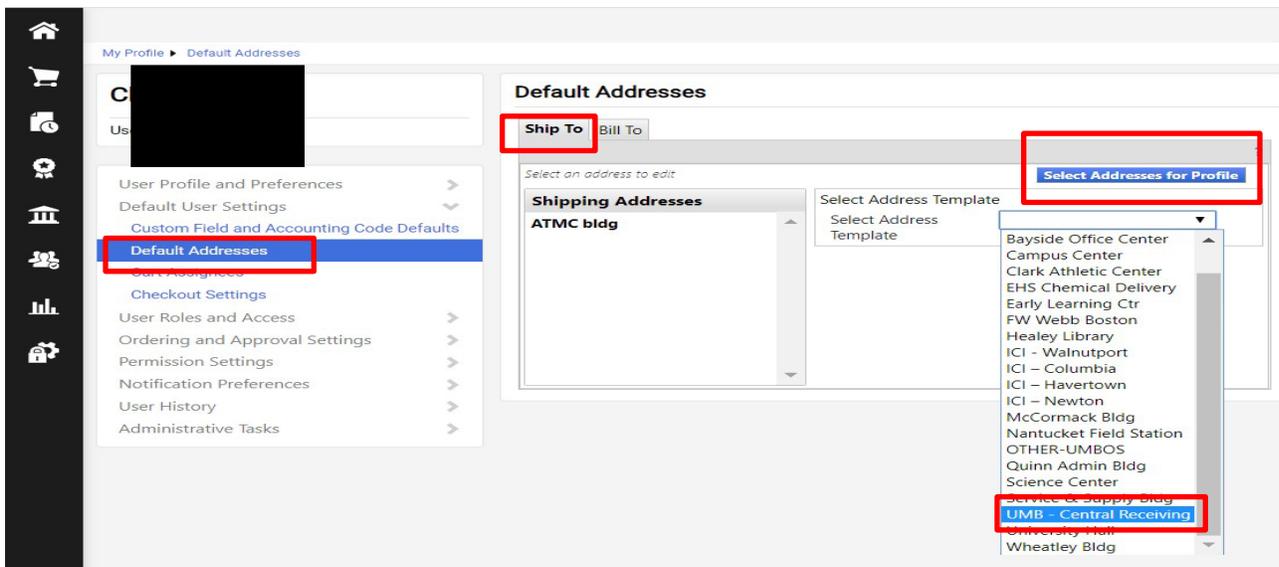


You should set up at least two addresses.

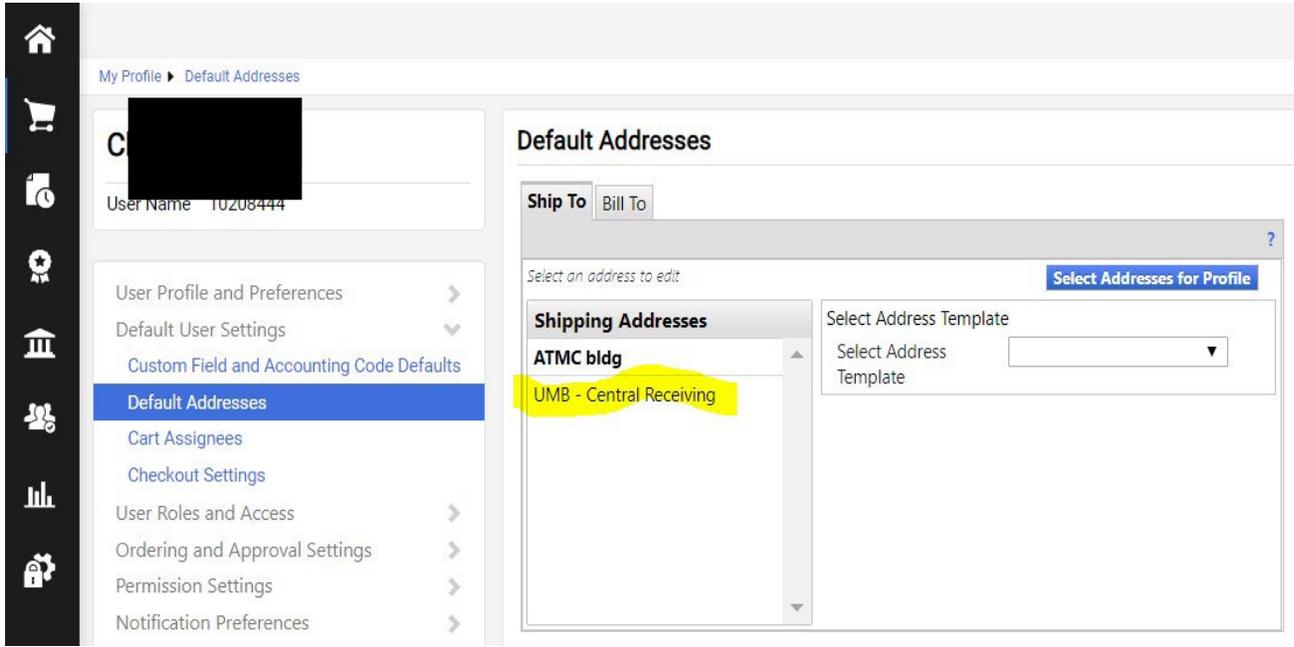
Central Receiving Address to identify your delivery address for all goods shipped by vendors other than our office supply vendor.

Desktop Delivery Address is for desktop delivery of office supplies from the University's contract office supply vendor only

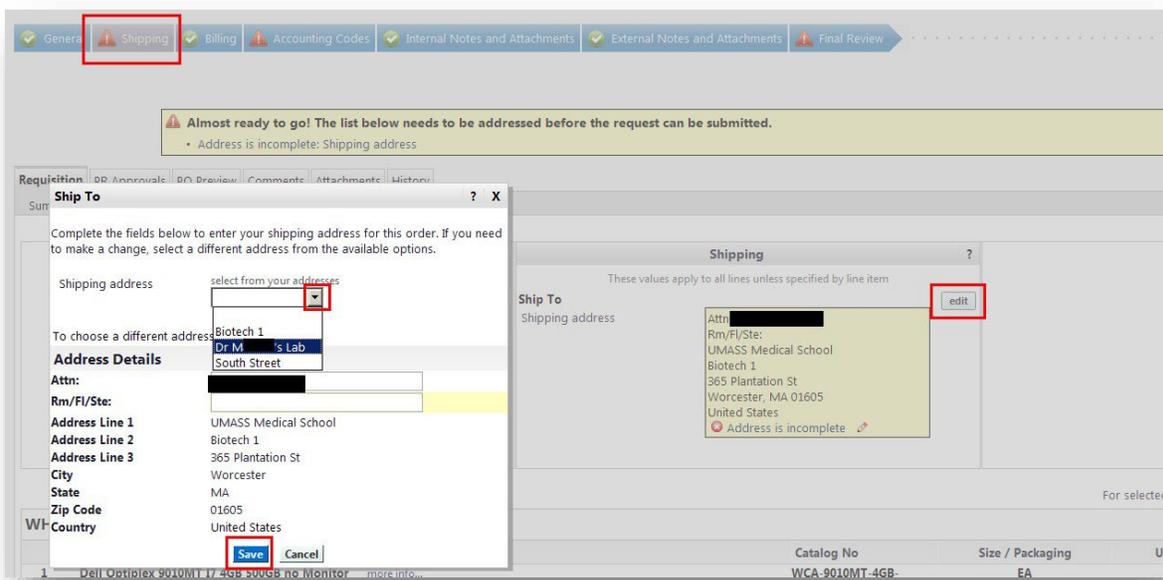
Click on 'Default Addresses' to set up ship-to-addresses. The 'Ship To' tab will be displayed. On the far right, click on 'Select Addresses for Profile'. Click on the 'Select Address Template' dropdown menu and make your selection (eg: UMB - Central Receiving). The screen will refresh, specify the 'Internal Rm/FI/Ste' and click save.



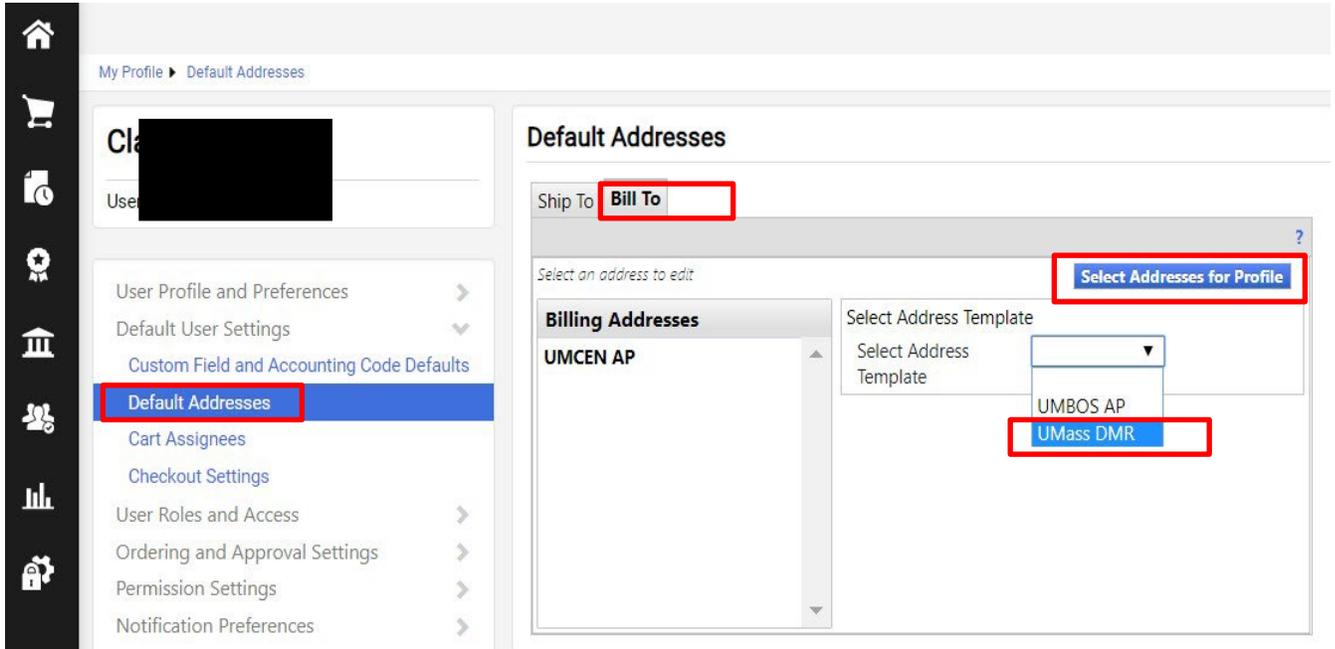
When you 'save' the information, the new address will appear under the Shipping Addresses on the left. The bold print address is where you check the 'Default' checkbox on the address and will automatically populate on each requisition for you. To prevent shipping errors, you should only check the default checkbox if all orders will be going to that address.



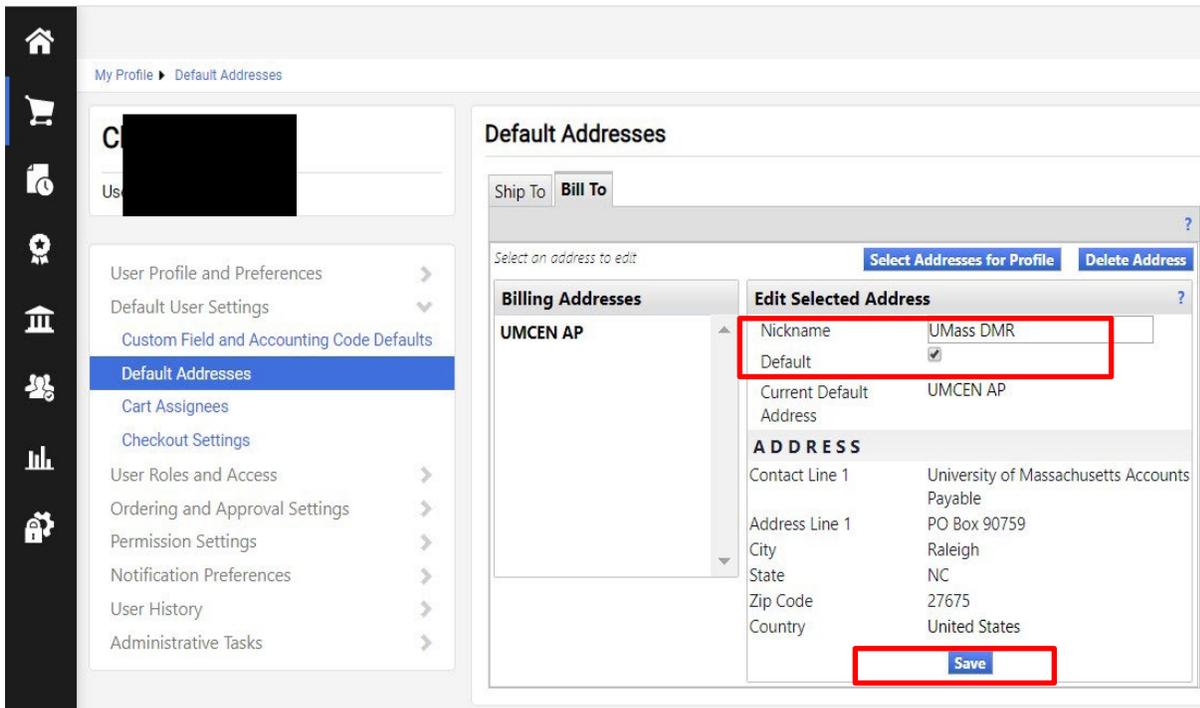
- You can modify the address from a cart shipping tab, click on Edit, then use the drop down box and select from your custom list.



- Users should also set up the default 'Bill To' address. From the Select Address Template drop down, click on the AP Address for your campus (UMLOW AP, UMBOS AP, UMCEN AP, UMAMH AP, UMDAR AP, UMWOR AP). As the billing address will be the same for all orders, check the 'Default' checkbox, then save.

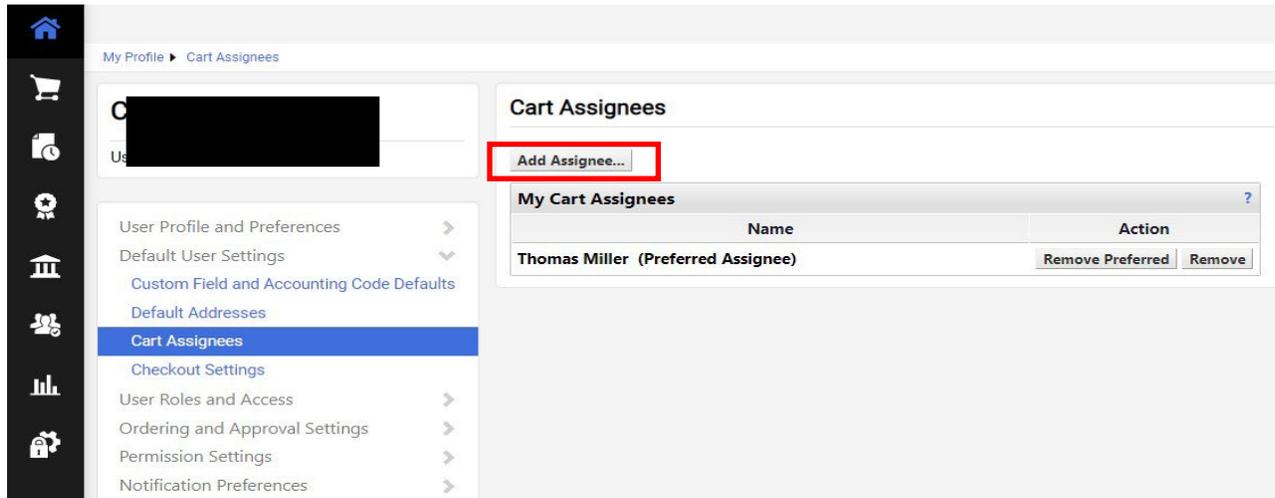


As the billing address will be the same for all orders, check the 'Default' checkbox, then save.

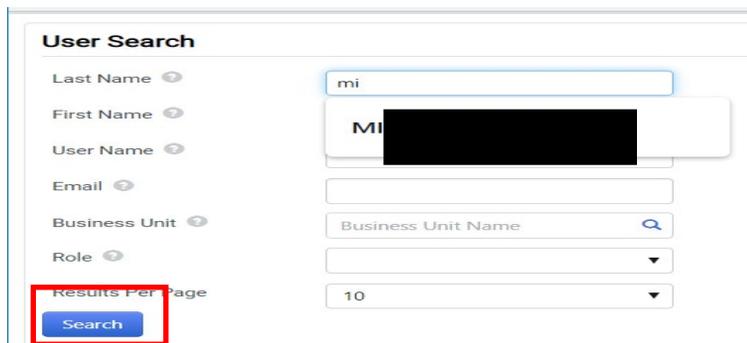


10. For Shoppers, it is HIGHLY RECOMMENDED that Cart Assignees be set up to avoid searching for the Cart Assignee on each requisition. It is also recommended that users have a backup Cart Assignee that can process your requisitions when the primary Assignee is out of the office.

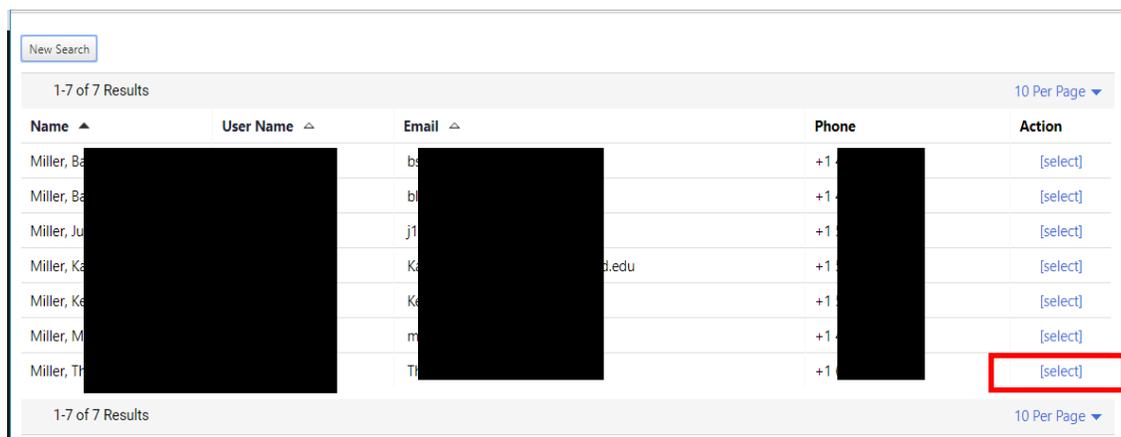
Click 'Add Assignee'



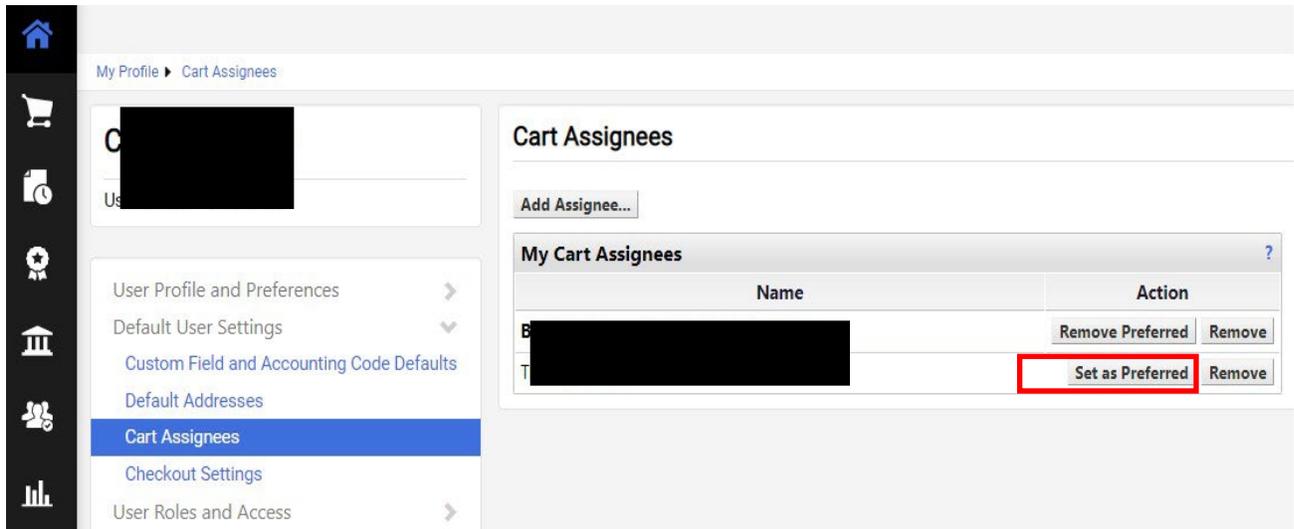
Type in your search criteria, then click 'Search'.



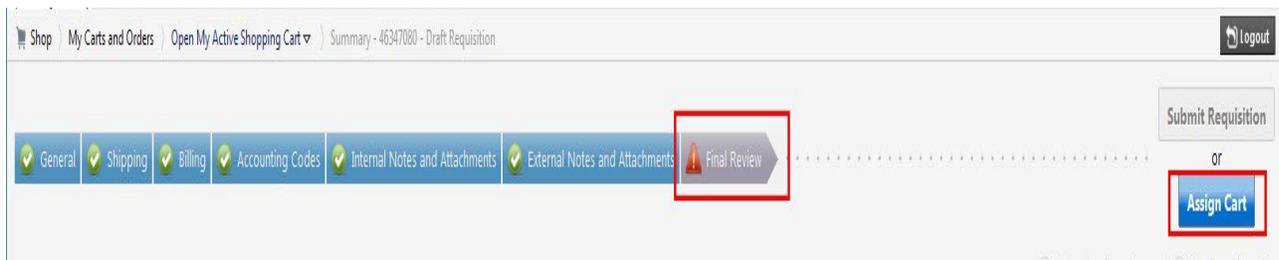
Click on 'Select' to the right of your Cart Assignee name



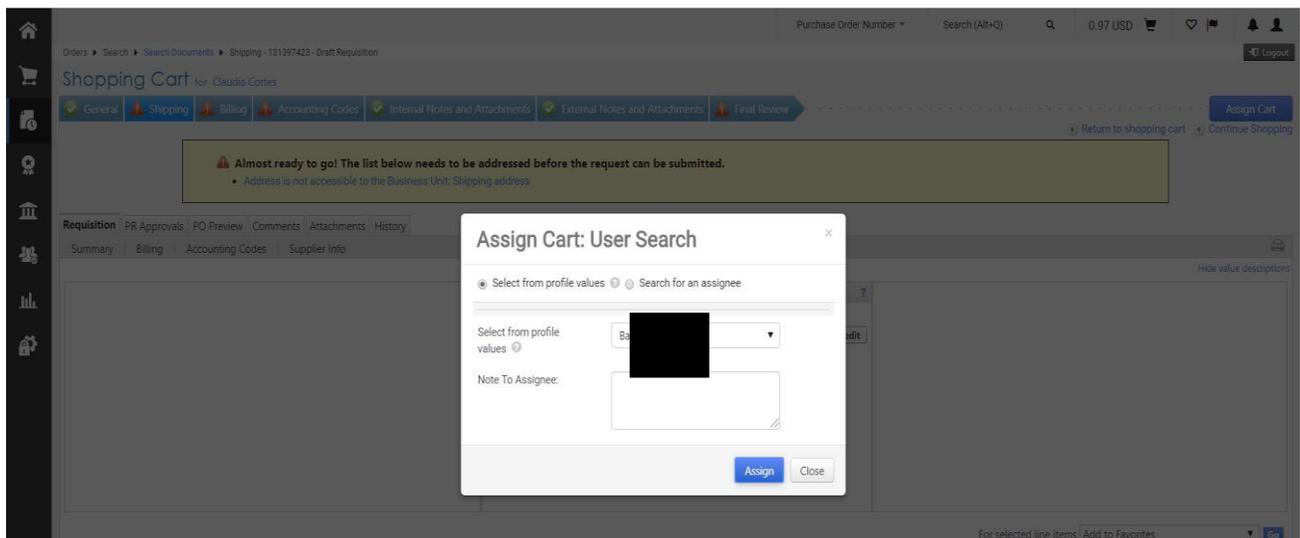
You can set your primary Assignee as the 'Preferred' name, so it will show as the 1st on your list to select from on your cart



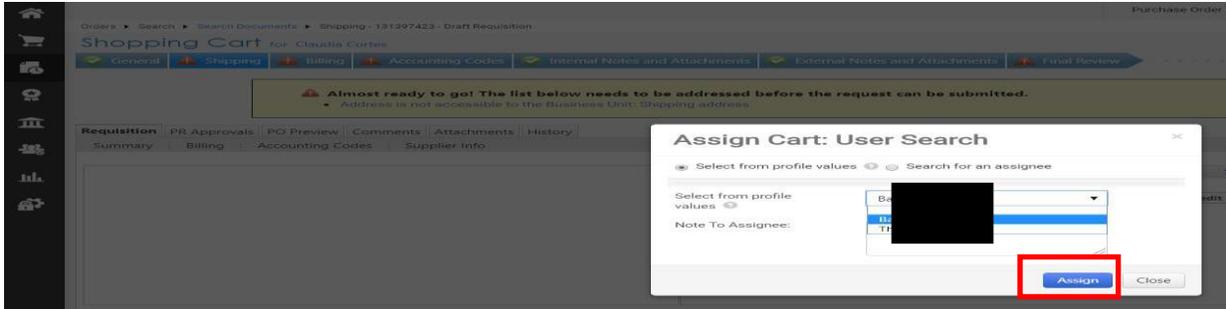
11. To use your Assignee on a requisition, from the Final Review tab, click on Assign Cart



Your 'Default' Assignee will appear in the message box. If this is who you will be assigning to, you can add an optional note, then click Assign.



To choose a different assignee from your custom list, click on 'Select from profile values. From the dropdown box, select the appropriate Assignee. The Assign Cart to: information will update. Add any notes to the Assignee, then click 'Assign'



12. You can update Notifications Preferences by clicking Edit Section to the right. Be very careful which notifications you turn off so as not to miss important tasks that you need to perform.

