WISBuy's PCard Marketplace
User Guide

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GETTING STARTED

The WISBuy PCard Marketplace is available to State agencies, University of Wisconsin System campuses, and municipalities. WISBuy allows users to make purchases from a variety of suppliers using a single login and with confidence that they're purchasing from the correct State contract and at the negotiated State rates.

REGISTERING FOR A WISBUY ACCOUNT

Navigate to the **WISBuy PCard Marketplace Sign-In page** at http://WISBuy.wi.gov and click **Create Account** on the right side. Enter the required information into the fields. Note the following information:

For **Business Unit**, use the dropdown menu to locate the name of your agency.

For **Department**, leave this field blank unless you are part of DOC Dental or DOA Facilities.

Your **User Name** is *not* case sensitive. Most State agencies recommend using your network (IAM) ID, and some even require it. If you have questions about what your agency requires, check with your Agency Administrator (often referred to as a BU Admin).

Your **Password** must be at least 7 characters and must include at least one uppercase letter and a number. Passwords *are* case sensitive and will never expire. This means that if you use your IAM ID for your user name, when you update your IAM password, your WISBuy password will not automatically change. If you want the passwords to match, you will need to manually change it in WISBuy. (We'll cover how to do this later.)

We strongly encourage you to set up a **Security Question**. This will allow you to recover your own password if you forget it. If you don't set up a security question, you will have to contact your Agency Administrator to regain access to your account.

When you've entered all the required information, click **Submit**.

WISBUY ACCOUNT ACTIVATION

Once you've submitted your registration information, your request for an account will be reviewed by your Agency Administrator. After your administrator has verified that you've completed the required WISBuy training and that you've met any other agency requirements, they'll activate your account. You'll receive an email notifying you when this has occurred.

LOGGING IN TO WISBUY

Once your account has been activated, it's time to log in. Return to the **WISBuy PCard Marketplace Sign-In page** at http://WISBuy.wi.gov. Enter your user name and password into the appropriate fields and click **Sign In**.

FORGOT YOUR PASSWORD

If you forgot your password, you can click the **Forgot your Password** link on the sign in page. You will be asked to enter your **User Name** and the **Email Address** associated with your WISBuy account. If you set up a security question when you registered, you will be sent an email with a link to reset your own password. You will be asked to answer your security question and to enter your new password. If you didn't set up a security question, you will receive an error message and will have to contact the WISBuy team or your Agency Administrator.

SETTING UP YOUR PROFILE

The first time you login, you'll be automatically taken to your profile page. To access this page any other time, click the **avatar on the far right** and select **View Profile**.

Review your profile information and make sure it's correct and make changes as necessary to any editable field. Be sure to click **Save** once you're done making any changes. Note the Profile Menu, highlighted on the left side of the screenshot above. You will be using this menu to set up the rest of your profile.

SETTING UP A DEFAULT SHIP TO ADDRESS

You will need to set up a default Ship To Address in your profile. To do this, look at the **Profile Menu** and click **Default User Settings**, then **Default Addresses**.

The Default Addresses window will display and the **Ship To tab** will already be selected. Click the blue **Select Addresses for Profile** button. This will display the **Address Search** box. Enter the city or street name of your Ship To address and click **Search**. If your search brings back too many results, try entering something more specific to your address. For example, there will many more results displayed for "Madison" than there are for "Wilson." If you can't locate the correct address for your location, contact your Agency Administrator for assistance.

Once you find the appropriate address, click the circle to the left of the address. This will display the screen shown below.

Note the **Nickname field** in the screenshot (highlighted in blue). ***Do not change this field!*** The info in this field must match the info in the vendor's system exactly. This is the field that the vendors use to know where to send your items. If you change this field, your order may be shipped to a different location or it may even be cancelled altogether.

You may change the other info in the address section, including the name on the **ATTN:** line, the **Division/Bureau**, and the **Room/Floor**. If this is going to be the primary Ship To address in your profile, be sure to click the **Default checkbox**. Your profile must have a default address assigned or you may experience issues accessing all of the vendor's sites in WISBuy. When you are done, click **Save** and you will see the Address Nickname appear on the left under **Shipping Addresses**. If you marked this address as your default, it will appear in **bold**, otherwise it will appear un-bolded.

If you will be shipping to multiple addresses, repeat the steps listed above.

SETTING UP A DEFAULT BILL TO ADDRESS

Next, we need to set up the default **Bill To** address. Click the **Bill To** tab at the top of the **Default Addresses** window. Click the blue **Select Addresses for Profile**. Click the **dropdown menu** and then click **Single Billto** (the only option). In WISBuy, we use a generic, fictional Bill To address as a placeholder, so don't worry that this doesn't match your real Bill To address – in WISBuy, it's not supposed to! Click the **Default checkbox** and click **Save**. It should match the screenshot below.

Next, we need to set up the default **Bill To** address. Click the **Bill To** tab at the top of the **Default Addresses** window. Click the blue **Select Addresses for Profile**. Click the **dropdown menu** and then click **Single Billto** (the only option). In WISBuy, we use a generic, fictional Bill To address as a placeholder, so don't worry that this doesn't match your real Bill To address – in WISBuy, it's not supposed to! Click the **Default checkbox** and click **Save**. It should match the screenshot below.

ADDING A PCARD TO YOUR ACCOUNT

You can add your PCard to your account, if you like. To do this, look at the **Profile Menu**, click **Default User Settings**, then click **Payment Options**. This will open the **Payment Options** window.

Click the **Add a New Card** button at the top of the window. This will bring up the **Card Details** form. In the **Name This Card** field you can enter any name you like to help you remember which card this is (for example, "My Visa" or "Office Supplies"). Enter the rest of your card's information exactly as it appears on the card. If you want this to be your default PCard, click the **Default Card checkbox**. When you're done, click **Save**. This card will now appear under **My Cards**. If you would like your default card to automatically be applied to all purchases, click the **Apply the Default Card checkbox** above the My Cards box.

Please note that WISBuy will not automatically remind you to update your PCard information when it expires. You will be required to return to this window and update that information manually.

FORWARDING A CART (ASSIGNING A CART)

If you are required to have someone else review your purchases or to make purchases on your behalf, WISBuy has a feature to assign a cart to someone else. You can shop for items, place them in your cart, and when you're done shopping, you have the option to "Proceed to Checkout" or "Assign Cart." Selecting "Assign Cart" will let you send your cart to an approver, who will then be able to either complete the purchase on your behalf or approve the cart and send it back to you or on to someone else.

To set up this feature, look at the **Profile Menu**, click **Default User Settings**, then click **Cart Assignees**. This will open the **Cart Assignees** window. Click the **Add Assignee** button, which will open a new window (make sure your browser's pop-up blocker is turned off). Search for the person who you would like to assign your cart to by entering search terms and clicking **Search**. Click the **[Select]** link on the right side of the window for the person who will review your purchases. This will close the new window and will add that person's name to your **My Cart Assignees** window. Clicking **Set as Preferred** will make this person your default selection when you choose to assign a cart in WISBuy. Your default person's name will appear in **bold** and will indicate that they're the preferred assignee.

ACCOUNT SECURITY

Changing Your Password

Even though your WISBuy password will never expire, it's still a good idea to update it occasionally. To change your WISBuy password, access the **Profile Menu** by clicking the **dropdown menu** next to your name at the top of the WISBuy page. Click **Update Security Settings** and **Change Password**. A new window will open and you will be asked to enter your **Old Password** (the current one) and your **New Password**. Click **Change Password** when you're done. Please note that you won't be able to reuse a previously used password.

CHANGING OR ADDING A SECURITY QUESTION

It's highly recommended that you add a security question to your WISBuy account. This will allow you to reset your own password if you forget it instead of having to contact your Agency Administrator. To add or change your security question, access the **Profile Menu** by clicking the **dropdown menu** next to your name at the top of the WISBuy page. Click **Update Security Settings** and **Change Security Question or Answer**. A new window will open and you will be able to select a question from the dropdown menu or select the option to create your own question. Enter the correct answer to your security question and click **Save Changes**.

SHOPPING BASICS

Now that your profile is set up, you're ready to start shopping in WISBuy.

SHOPPING HOMEPAGE

To navigate to your Shopping Homepage, click the **WISBuy logo** at the top of the page or click the **Home Icon** on the Side Menu. If you're returning to WISBuy, you will automatically begin on the Shopping Homepage.

The Shopping Homepage shows a number of dropdown sections. These dropdown sections are categorized by contract type and each section contains catalogs from suppliers who are part of each contract. (Please note that not all suppliers who have been awarded a contract are necessarily included within WISBuy; check individual contracts for full lists of available suppliers.) You may collapse or expand these dropdown sections to best fit your shopping needs.

There are two types of catalogs available in WISBuy: Hosted catalogs and Punchout catalogs. In the screenshot below, the first three catalogs are Punchouts and the last two are Hosted. Let's take a closer look at each type and highlight the differences you should be aware of.
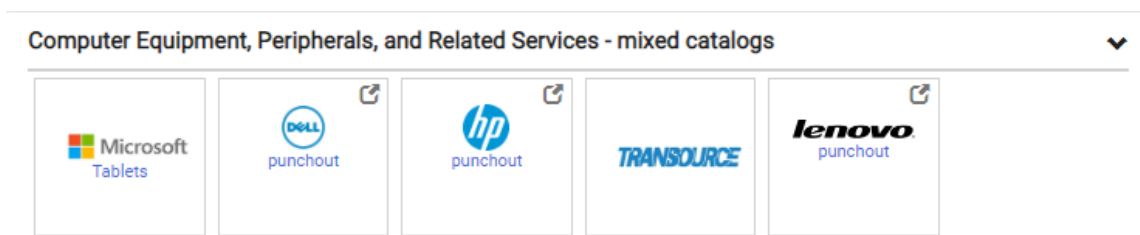

HOSTED CATALOGS

Hosted catalogs get their names because they are "hosted" within WISBuy and are considered to be the more basic type of WISBuy catalog. To search for a product from a specific hosted catalog, click the catalog sticker (the button with the supplier's name on it) and a search box will appear below it. You can either search for a specific product by entering a search term in the field, or you can look at all products from this supplier by pressing enter.
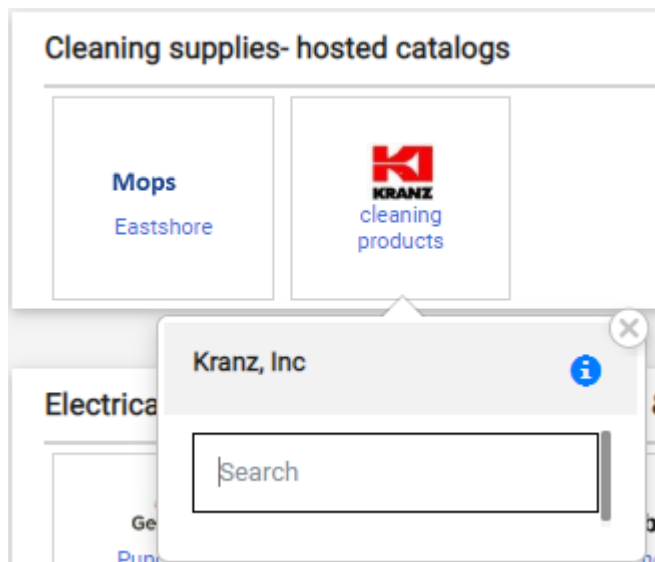
To purchase an item, click **Add to Cart**.
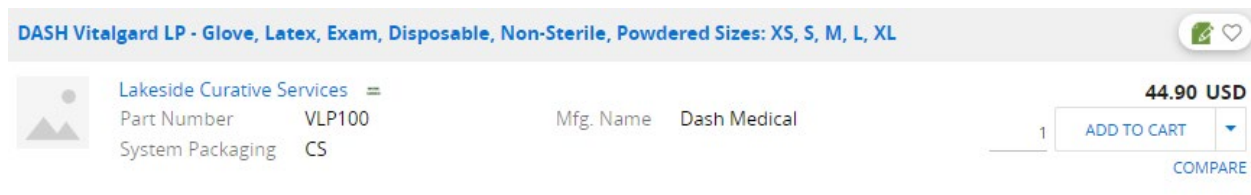
PUNCHOUT CATALOGS

Punchout catalogs get their names because they "punch out" of WISBuy and take users to a WISBuy-version of their company's website. Since Punchout catalogs are maintained by the vendors, each website will look and function slightly differently, but each one will offer users the ability to be able to do the same things, like search for items, add items to carts, and return to WISBuy. If you have questions about a specific Punchout catalog, check with your Agency Administrator.

To search for an item from a Punchout catalog, click the catalog sticker and the supplier's website will open – sometimes in a new window (make sure your pop-up blocker is disabled). Each Punchout catalog is a little different, but they all have a search bar and a way to **Add to Cart**. After adding items to your cart, you will be given the option to **Continue Shopping** or **View Your Cart**. When you're done shopping at the punchout, select **View Your Cart** and follow the prompts to checkout or return to WISBuy, depending on the punchout (both options will return you to WISBuy). When you return to WISBuy, you will be taken to the View Your Cart screen.

VIEWING YOUR CART & CHECKING OUT

At the top of your WISBuy homepage, you will see the Shopping Cart Icon with total dollar amount of the items in your cart.
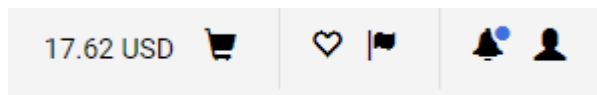
Clicking the **Shopping Cart Icon** will allow you to review the items in your cart. You can compare items in your cart, update the quantity of each item, or remove items you no longer want to purchase. Once you're ready to complete your purchase, click **Proceed to Checkout** if you have a PCard you will be using for this order or **Assign Cart** if you need to have someone approve your order or purchase it with their PCard.
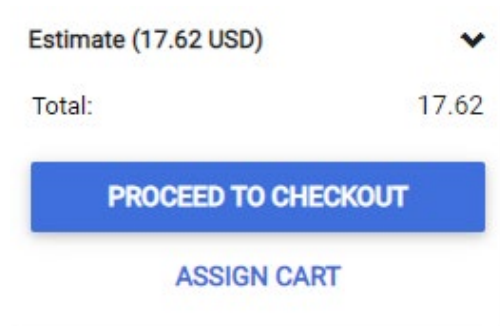
Once you click **Proceed to Checkout**, you'll be able to review your order on the Requisitions page and will have the ability to change the pre-defined Ship To Address, add attachments, or change the PCard you'll use for the order. To complete your order, click **Place Order**. Once you've successfully placed your order, you'll receive a confirmation email from the supplier.

ORDER DOCUMENTATION

After placing an order, you may want to view your order documentation. To do this, click the **Document Icon** on the **Side Menu** (the third icon from the top) and click **Search Documents**. On the Document Search screen, make sure your search is set to **All Documents** and click **Go**. This will display all the requisitions and orders you have placed through WISBuy.

You can filter your search results by using the filters on the left side of the search results page. Filter options include type of documents (orders or requisitions), date, and supplier. You can export your orders to Excel by clicking **Export Search**. To view your order details, click the blue hyperlinked **Order Number**. From this page, you will be able to print your record by clicking the **Printer icon**.

LOCATING YOUR WISBUY ORDER NUMBER

If you need to make a return or reconcile your PCard, you will need to know how to locate your WISBuy Order Number. To do this, follow the instructions above to do a Document Search for the order you're interested in. The first column of your search results will be "Document Number." Your WISBuy Order Number will be the Purchase Order Document Number and will begin with a W (for example, "W1234567").
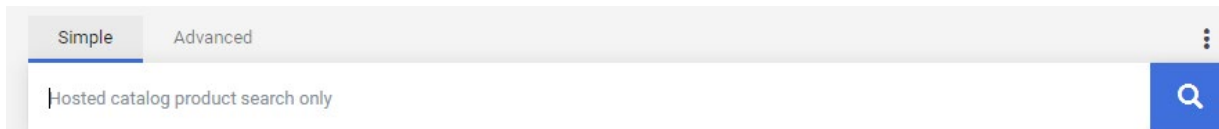
SEARCHING FOR ITEMS IN WISBUY

There are a number of ways to search for items in WISBuy. These searches will not include items from Punchout catalogs (those must be done at each individual site). It is still possible to compare items from different Punchout catalogs by adding items to your cart from the Punchouts, returning to WISBuy, and viewing your cart.

SHOP & COMPARE BAR

Navigate to your **Shopping Homepage** by clicking the **WISBuy logo** at the top of the page or click the **Home Icon** on the Side Menu. If you're returning to WISBuy, you will automatically begin on the Shopping Homepage.
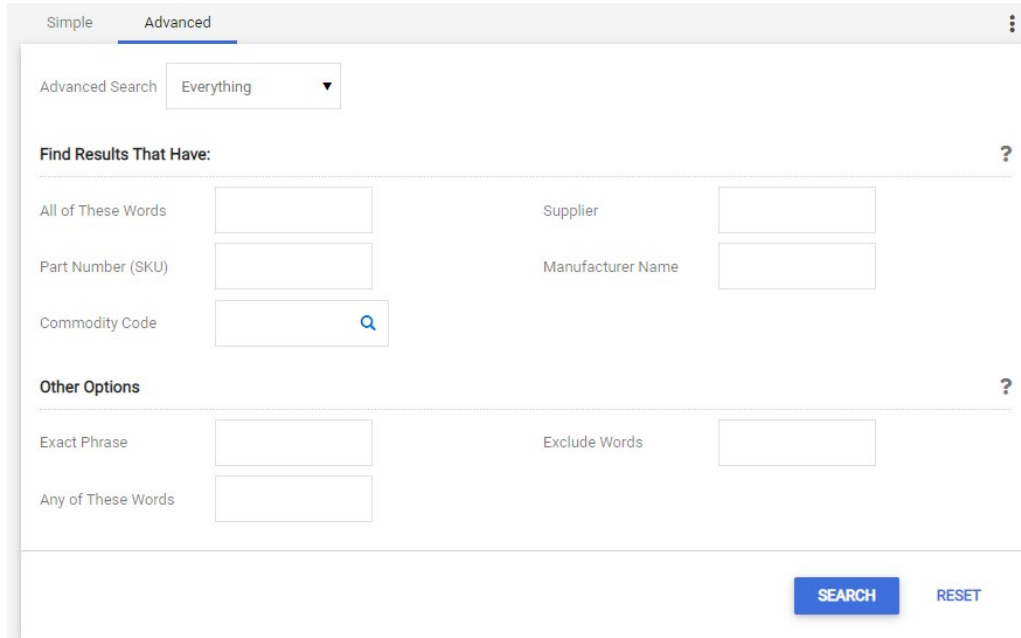
The **Search** bar can be found at the top of your Shopping Homepage. It's used to search products from Hosted catalogs by name, part number, or manufacture number (items from Punchout catalogs will not be included in your searches). Your search will work best when you use part numbers or short descriptions.

ADVANCED SEARCH

By clicking **Advanced Search**, located under the Shop & Compare bar, you can further refine your search using additional search criteria. Once on the Advanced Search window, you can return to the original Search bar by clicking **Simple Search**.

FILTERING SEARCH RESULTS

You can refine your search results by clicking the **Filters** on the left side of the search results page. You can also sort your results by clicking **the drop down arrow** at the top of the results window.

WISBUY MENU REFERENCES

The Top Menu can be found at the top of the screen after logging into WISBuy.

TOP MENU		
NAME	ICON	DESCRIPTION
Name Dropdown Menu		Use this to access the Profile Menu, set your Homepage when you login to WISBuy, or to Logout
Star Icon		Accesses your WISBuy Bookmarks
Flag Icon		Lists any Action Items assigned to you
Bell Icon		Lists your Notifications
Shopping Cart Icon		Allows you to View Cart or Checkout

The Side Menu is located on the left side of the screen after logging into WISBuy.

SIDE MENU		
NAME	ICON	DESCRIPTION
Home Icon		Returns you to the WISBuy Homepage
Shopping Cart Icon		View your active and saved carts, view your recent orders, and access carts you've been assigned
Documents Icon		Access document searches, locate requisitions and purchase orders
Contracts Icon		Access contract information
Suppliers Icon		Allows administrators to complete various tasks in WISBuy; access search for active and inactive suppliers
Reporting Icon		Allows administrators to complete various tasks in WISBuy

WISBUY SUPPORT

If you have issues while using WISBuy, you should first check with your [Agency Administrator](#) (often referred to as a BU Admin). If your Agency Administrator is unable to help, they may reach out to the WISBuy team at doawispro@wisconsin.gov.