

About Shopping

Requestors submit requisitions within CU Marketplace, and are responsible for ensuring that requisitions \$5,000 and less are accurate, appropriate, and reasonable. You finalize shopping carts, including any shopping carts you create. You are also able to receive against a Purchase Order (PO) in order to authorize payment of invoices.

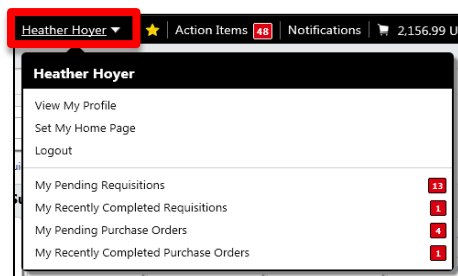
There are two ways to shop within CU Marketplace: by catalog or by form. Catalogs are used to request goods from a supplier who offers CU-specific pricing. Forms are used to request goods or services when a catalog cannot be used, or to facilitate specialized business processes such as sole source justifications, Payment Voucher requests, and subcontracts.

Accessing CU Marketplace

1. Log into [your campus portal](#).
2. Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

Reviewing Req/PO Status

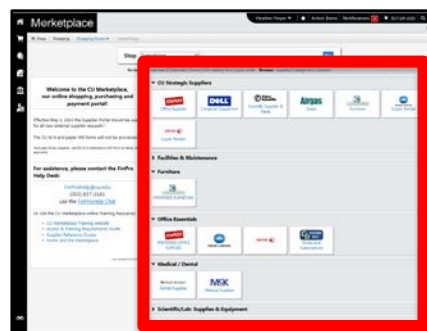
One way to review the status of your requisitions or Purchase Orders (PO) is to use your name dropdown along the top of your screen.



Catalog Shopping

Most catalogs are known as "punch-outs," which connect you to supplier-maintained websites custom to CU. Products selected are returned to your CU Marketplace shopping cart for processing. Some catalogs are "hosted," which means the electronic catalogs are maintained directly in CU Marketplace.

1. From your home page, click the **supplier's icon**. If the **punch-out** link appears, click it to begin your punch-out session.
2. Search for items within the supplier's catalog and add them to your cart.
3. If punch-out shopping, confirm your order within the punch-out in order to return item(s) to your CU Marketplace shopping cart.
4. Refer to the **Finalizing Shopping Carts** instructions for next steps.



Forms Shopping

A supplier must be set up in CU Marketplace before you can enter a form. If the supplier isn't in the Marketplace, refer to the [CU Supplier Portal web page](#) for guidance.

1. From your home page, use the **CU Purchasing & Payment Forms** section to select the appropriate form.
2. Enter all required information (indicated by the **bold** field names).
3. If appropriate, click the **add attachments...** link to attach documents that should be dispatched to the supplier with your Purchase Order (PO).
4. Use the **Available Actions** dropdown menu to select **Add and go to Cart**.
5. Click the **Go** button to return to your shopping cart.
6. Refer to the **Finalizing Shopping Carts** instructions for next steps.

Finalizing Shopping Carts

Shoppers can assign shopping carts with or without completing this information.

1. If needed, select the shopping cart. One way to do this is to use your side navigation bar to go to **Shop > My Carts and Orders > View Draft Shopping Carts** and select the appropriate cart.
2. Click the **Add Speedtype/Shipping/etc.** button. Missing information, such as Shipping Address, SpeedTypes and Accounts will appear as an error at the top of the page.
3. Enter Shipping, SpeedType(s), and Account(s) as needed. Click the **Save** button.
4. Review the order for accuracy and appropriateness. Click the **Submit Order** button.

Splitting Distributions Across SpeedTypes

1. Begin finalizing the shopping cart (see above section) but do not submit.
2. On the **Accounting Codes** tab, click the first **edit** button.
3. Enter the appropriate SpeedType and Account.
4. If splitting the entire order the same:
 - a. Click the **Add split** link.
 - b. Select **% of Qty** (or other) from dropdown menu. Enter the **split % amount**.
 - c. Enter another SpeedType. Repeat as needed.
 - d. Once done, click the **Save** button.
5. If splitting by line:
 - a. Click the **Save** button.
 - b. Scroll to the appropriate line item to change.
 - c. Click the **edit** button to the right of the line.
 - d. Enter the appropriate SpeedType and/or Account.
 - e. To split a line between SpeedTypes, click the **Add split** link, select **% of Qty** (or other) from dropdown menu, and enter the **split % amount**.
 - f. Once done, click the **Save** button. Repeat as needed.
6. Review the order for accuracy and appropriateness. Click the **Submit Order** button.

Renaming Shopping Carts

We recommend renaming your carts to better locate the subsequent requisition/PO.

1. If needed, select the shopping cart. One way to do this is to use your side navigation bar to go to **Shop > My Carts and Orders > View Draft Shopping Carts** and select the appropriate cart.
2. In the **Name this cart** field, enter your cart's new name.
3. Click the **Update** button.

Modifying Shopping Carts

- To add additional items to your shopping cart: Continue to shop.
- To modify forms: Click the form's name from your shopping cart, make updates to the form, and use the **Available Actions** dropdown to save changes.
- To modify hosted catalog items: Use the **Update** and **Remove** buttons associated with each line item.
- To modify punch-out catalog items: Use the **Modify Items** link to be transferred back to your punch-out session and make changes. If the **Modify Items** link doesn't appear, delete all of the items in your cart from that supplier and begin a new punch-out session.

Consolidating Shopping Carts

When consolidating shopping carts, the Shopper(s) lose visibility of their orders.

1. Use your side navigation bar to go to **Shop > My Carts and Orders > View Draft Shopping Carts**.
2. Select one of the carts you want to consolidate.
3. Check the boxes next to the appropriate line(s). (**Select All** ☒ selects all lines at once.)
4. Use the dropdown menu to select **Move to Another Cart**.
5. Select **Move to new cart**. Click the **Move** button, then click the **Close** button.
6. Repeat steps 1 through 4 for each subsequent cart. Select the same cart when moving lines.

Once Shopping Carts are Submitted and Turned into Requisitions...

- If needed, the requisition is approved by the appropriate Approvers.
- The requisition then becomes a Purchase Order (PO), which is automatically distributed to the supplier via the supplier's preferred method.
- Some forms will **not** dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
- Suppliers are provided with the Requestor's contact information, as supplied within CU Marketplace, and will contact the Requestor directly with questions or concerns.

Adding Requisition Notes and Attachments

- **Internal Notes and Attachments** and **External Notes and Attachments** may be added to the requisition during the approval process.
 - All attached documentation will remain with the requisition and Purchase Order indefinitely.
 - Some suppliers have the ability to accept external notes and attachments with a Purchase Order. Notifications will indicate if notes and attachments are accepted.
1. Locate the requisition. One way to do this is to use your name dropdown along the top of your screen (see previous page).
 2. Click the **Requisition** page tab, **Summary** page sub-tab.
 3. Click the appropriate **add attachment...** link. (External attachments are sent to the supplier, internal attachments are used for internal purposes.) Add the file or URL. Click the **Save** button.

Receiving POs

Receiving authorizes payment of invoices against a Purchase Order (PO). It is required for POs over \$5,000 total, no matter the amount of each individual invoice. An email notification is sent when a receipt is necessary. (Refer to the Quick Reference Guide [Receiver](#) for additional actions, such as entering returns.)

1. Locate the PO. One way to do this is to use the Quick Search in the upper right corner of your screen. Use the dropdown to select **Purchase Order Number**. Enter the PO number in the next field, then click the **Search** button.
2. Use the **Available Actions** dropdown and select **Create Quantity Receipt**.
3. Click the **Go** button.
4. Verify the received **Quantity** and update as needed.
5. If a line is not part of this receipt, click the **Remove Line** button.
6. Click the **Complete** button, located in the lower right corner of your screen.

Requisition, Purchase Order, & Payment History

All requisitions, Purchase Orders (POs), receipts, and vouchers (invoices) are permanently stored within CU Marketplace.

1. Using your side navigation bar, go to **Orders & Documents > Document Search > Search Documents**.
2. If needed, click the **advanced search** link in the upper right corner of your screen.
3. Use the **Search** dropdown to search by **Requisition**, **Purchase Order**, or **Invoice/Voucher**.
4. Enter your search criteria and click the **Go** button.
5. A list of results will appear. Use the left side of your screen to refine your search by options such as date range, supplier, user, or status.
6. Click the **document number** to view the document.