Using Punch-out Catalogs for Shopping in CU Marketplace

In This Guide

This guide discusses the punch-out catalog shopping process. Topics covered are:

- ✓ Punch-out catalog definition
- Procedure for punch-out catalog shopping
- ✓ Punch-out catalog shopping process cycles
- ✓ Procedure to pay invoices (receiving)

What does "punch-out catalog" mean?

Catalog shopping can be accomplished using hosted or punch-out catalogs – in other words, where CU-specific items and prices are offered by CU-contracted suppliers. Punch-out catalogs are maintained on the suppliers' CU-custom websites and accessed from CU Marketplace.

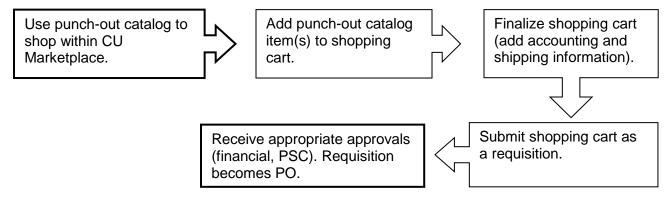
The punch-out catalog shopping experience is different from supplier to supplier. Punch-out catalogs are created and maintained by each supplier, so the exact steps of how to search, shop and add items to your shopping cart will vary. (This guide illustrates Staples' punch-out catalog.)

Sole Source Purchases

For purchases over \$5,000 where only one supplier can provide the goods or services being requested, instead use the Sole Source Justification form. Refer to the Step-by-Step Guide <u>Creating Sole</u> <u>Source Procurements in CU Marketplace</u> for further guidance.

Punch-out Catalog Process Cycles in CU Marketplace

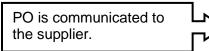
Shopping Process for Punch-out Catalog Purchases:



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Payment Process for Punch-out Catalog Purchases:



Supplier submits invoice(s) for payment.

Do online receiving to authorize invoice to pay.

Punch-out Catalog Shopping Procedure

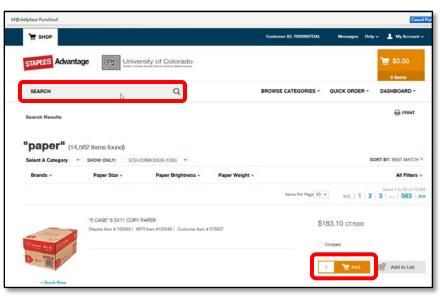
Begin by accessing CU Marketplace via <u>your campus portal</u>. Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

Step #1: Use a punch-out catalog to shop within CU Marketplace

- 1. From your CU Marketplace home page, select a supplier by clicking on the supplier's logo or name.
- 2. You will automatically be connected to the supplier's punch-out.

Do you see a pop-up search box instead of a punch-out session? If so, the supplier offers a hosted catalog instead of a punch-out. Refer to the Step-by-Step Guide <u>Using Hosted Catalogs for Shopping in CU</u> <u>Marketplace</u> for further guidance.

- 3. Search for the item using the punch-out catalog's functionality. (This guide shows a search for the keyword "paper.")
- Locate the appropriate item, enter the **Quantity** and add it to your cart.
- Continue to shop and add items to your shopping cart, if needed.



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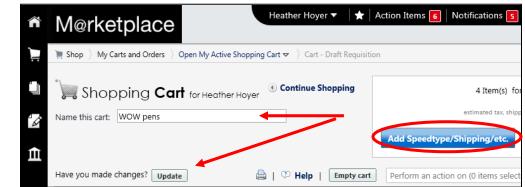
- When you are finished shopping and ready to checkout, go to your shopping cart (usually located in the upper right of your screen).
- 7. Review your order and proceed to checkout.
- 8. Submit your order; you will be returned to your CU Marketplace shopping cart.

Visit the <u>Punch-out and Hosted</u> <u>Catalog Guides</u> for supplier-specific ordering information.

Э снор			Customer ID: 70000607	DAL Messages	Help v 1 My Account v
STAPLES Advan		sity of Colorad	do		€ \$183.10
SEARCH		Q	BROWSE CATEGORI	ES - QUICK ORDE	
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					VTA1 \$183.10

9. We recommend that you enter a unique shopping cart **Name** to easily identify or search for your

shopping cart. If you do, click the **Update** button to save your shopping cart's new name.



Step #2: Finalize shopping cart

- 1. Click the Add Speedtype/Shipping/etc. button located in the upper right corner.
- 2. Navigation tabs appear at the top of the page and the error icon *highlights* where your attention is needed. You can click on the tab to navigate to the section and provide information.



An error message also displays next to the field missing required information.

Step-by-Step Guide Using Punch-out Catalogs for Shopping in CU Marketplace

SHIPPING INFORMATION

If you have set a Ship To default in your profile, you only need to come here if you want to change your default shipping address for this SPO.

- 3. Click the Shipping tab.
- 4. Click the edit button to the right of the Ship To field.
- 5. Use the dropdown to select from addresses in your profile.

Or, search for a different shipping address by clicking the **click here** link. Then, click the **select from org addresses** link and enter part of your address in the **Nickname/ Address Text** field. Select the appropriate address from the resulting list.

Ship To	?	x					
shipping addres	elds below to enter your s for this order. If you need select a different address le options.	to					
Shipping address	select from your addresses						
	ferent address, click here						
Address Det	ails						
TTN: Heather Hoyer							
RM/FLR/STE	600						
Address Line 1	1800 Grant Street						
Building	Office of the President						
City	Denver						
State	CO						
Zip Code	80203						
Country	United States						
	Save Cancel						

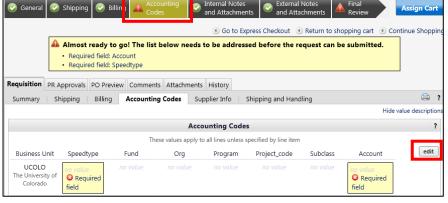
 Enter the attention (ATTN) and room/floor/suite (RM/FL/STE) information and click the Save button.

Due to space limitations on the supplier's side, enter the **ATTN** and **RM/FL/STE** information as concisely as possible.

These fields can be used to enter other pertinent delivery information but keep in mind that the field truncates differently for different suppliers. Be brief!

ACCOUNTING INFORMATION

- 7. Click the Accounting Codes tab.
- Click on the Required field link or the edit button to enter or search for the SpeedType and Account.
- Enter the appropriate SpeedType using one of the following methods:
 - If you have set your SpeedType Profile, click the Select



from profile values link to access your SpeedType list.

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• Type the **SpeedType** and click the **recalculate/validate values** link to return the corresponding Fund, Org, Program or Project value values.

Accounting	g Codes							? X
Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account	add split
UCOLO 💌	Select from profile values Select from all values	10	50027	46291		ICCA	Select from all values	
							recalculate / validate value	s
		Reca	lculate and	Save Sa	Cancel			

If needed, click the Select from all values.... link to search for the SpeedType using the Custom Field Search

You can search by all or part of the SpeedType number (value) or description.

- Custom Field Search		?		
Value	5101			
Description				
	Search			
Results per page 20 💌	Values Found 5		🛛 Page 1 💌	of1⊅
Value 🔺	Descrip	tion 🛆		
value -	bosen	cioni		
51013624	Regents General			select
				select select
51013624	Regents General			
51013624 51014397	Regents General SA ICCA Recharge			select

- 10. Type the **Account**, or click the **Select from all values...** link to search for the account using the **Custom Field Search**.
- 11. Click the **Save** button.
- 12. Click the **Internal Notes and Attachments** tab, if needed, to add notes to someone other than the supplier, such as the PSC purchasing agent or your financial approver.
- 13. Click the **External Notes and Attachments** tab, if needed, to add notes to or documents to be dispatched to the supplier with your resulting PO.
- 14. Click the **Final Review** tab to complete your review. If needed, click the **edit** button to make additional updates.

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Step #3: Submit shopping cart as a requisition

(You must have Requestor access in order to perform this step.)

- 1. Click the **Submit Order** button located in the upper right corner.
- 2. A congratulatory message will appear, along with a summary of your requisition.

CU Marketplace will send an email notification to the Approver(s).

Step #4: Receive appropriate approvals, if needed

After the Requestor submits your shopping cart as a requisition:

- For requisitions \$5,000 or less CU Marketplace converts your requisition into a PO and communicates your PO to the supplier to place your order.
- For requisitions over \$5,000 CU Marketplace routes your requisition for financial approval. Financial approval is given by an individual with a fiscal role on the SpeedType (except Officer) who is also a CU Marketplace Approver. After financial approval is obtained, CU Marketplace routes your requisition for PSC approval. Once approved by the PSC, your requisition will convert into a PO. The Requestor will receive an email notification from CU Marketplace. Your PO is communicated to the supplier to place your order.

PO Payment Procedure

First, let's begin by reviewing the payment cycle illustrated on page 1:

PO is communicated to the supplier.

Supplier submits

Do online receiving to authorize invoice to pay.

Once your order is placed with a supplier, referencing your PO number, the supplier must submit an invoice to receive payment.

If the PO total amount is over \$5,000, online receiving is required to authorize each invoice to pay – regardless of the dollar amount of the individual invoice.

If you receive the invoice prior to the Procurement Service Center (PSC), email the invoice to <u>APInvoice@cu.edu</u>.

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An email notification is sent to the Requestor and any approvers once the invoice is entered as a voucher into CU Marketplace. You can then review the voucher online. The Requestor (or Receiver) should complete online receiving.

Do online receiving to authorize invoice(s) to pay:

- Begin by accessing CU Marketplace via <u>your campus portal</u>. Locate your CU Resources section and, under the Business Applications area, select the CU Marketplace link.
- 2. Locate your PO using one of the following methods:

Method 1: PO/Voucher # known

If you know the PO or voucher #, use the Quick Search located in the upper right corner of your screen.

Hoyer 🔻 🛛 🛨 🕇 Action Items 🛐 🛛 Notifications 🗎 📜 2,156.99 USD	Q,
Quick Search Alt	+ Q
Purchase Order Number 💌 1100001554	Q,
Go	

Click the Quick Search icon.

If searching by PO #: Use the dropdown to select *Purchase Order Number* and enter the PO in the next field; click the **Search** button.

If searching by voucher #: Use the dropdown to select *All* and enter the voucher in the next field; click the **Search** button. Select the PO from the resulting list.

Method 2: PO/Voucher # not known

If you do not know the PO or voucher #, perform a Document Search. Use your side navigation bar and go to Orders & Documents > Document Search > Search Documents.

Search Requisition -		simple search
	Go	
Requisition Identification		
Requisition Number(s)		
Requisition Name		
Requisition Information		
Participant(s)		٩

If needed, click the **advanced search** link in the upper right corner of your screen. Use the **Search** dropdown to search by *Purchase Order* (or by *Requisition* or *Voucher*). Enter your search criteria and click the **Go** button.

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 SpeedType. Select the PO from the resulting list.

- Once your PO is displayed, use the Available Actions dropdown (located in the upper right corner of the page) and select *Create Quantity Receipt*. Click the Go button.
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- 4. On the **draft receipts** page, if needed:
 - Enter a unique **Receipt Name**.
 - Enter the **Packing Slip No.** and attach a scan of the packing slip for records purposes.
- 5. Record the items that arrived, or the portion of services performed, in the **Receipt Lines** section located in the bottom part of your screen.

•									
						For Se	elected Lines: Re	move Selected Item	.s 🔽 Go
	oduct Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Invento y	Line Status	Actions	
EasyTidesRTM ATP, [🔶 🚭	gamma-32P]-, 1mCi (37MBq)	BLU502Z001MC	2 EA		2		Received 💌	kemove Line Receive & Return	
		NEF1002001PK	6 RL		6		Received 💌	Remove Line Receive & Return	
		6760619C	13 KT		13]	Received	Remove Line Receive & Return	
MicroScintTM-20, 1L		6013621	22 EA		22		Received 💌	Remove Line Receive & Return	
		N3050203	3 EA		3		Received 💌	Remove Line Receive & Return	
	EasyTidesRTM ATP, [PolyScreenRTM PVDF Membrane, 1 (26.5cm Number NEF1002 AlphaScreenRTM Hist Detection Kit, 500 ass MicroScintTM-20, 1L Multi-Element Ca-Zn	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq)	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU502Z001MC PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog NEF1002001PK AlphaScreenRTM Histidine (Nickel Chelate) 6760619C Detection Kit, 500 assay points 6760619C MicroScintTM-20, 1L 6013621 Multi-Element Ca-Zn Lumina Hollow Cathode N3050203	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU502Z001MC 2 EA PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog NEF1002001PK 6 RL AlphaScreenRTM Histidine (Nickel Chelate) 6760619C 13 KT Detection Kit, 500 assay points 6013621 22 EA MicroScintTM-20, 1L 6013621 22 EA Multi-Element Ca-Zn Lumina Hollow Cathode N3050203 3 EA	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLUS02Z001MC 2 EA PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog NEF1002001PK 6 RL AlphaScreenRTM Histidine (Nickel Chelate) 6760619C 13 KT Detection Kit, 500 assay points 6013621 22 EA MicroScintTM-20, 1L 6013621 22 EA Multi-Element Ca-Zn Lumina Hollow Cathode N3050203 3 EA	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU502Z001MC 2 EA PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog NEF1002001PK 6 RL 6 AlphaScreenRTM Histidine (Nickel Chelate) 6760619C 13 KT 13 Detection Kit, 500 assay points 13 2 MicroScintTM-20, 1L 6013621 22 EA 22 Multi-Element Ca-Zn Lumina Hollow Cathode N3050203 3 EA 3	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU502Z001MC 2 EA 2 PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog NEF1002001PK 6 RL 6 AlphaScreenRTM Histidine (Nickel Chelate) 6760619C 13 KT 13 Detection Kit, 500 assay points 6013621 22 EA 22 Multi-Element Ca-Zn Lumina Hollow Cathode N3050203 3 EA 3	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU5022001MC 2 EA 2 Received PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26,5cm x 3.75m) Roll, Catalog NEF1002001PK 6 RL 6 Received Import NEF1002 AlphaScreenRTM Histidine (Nickel Chelate) 6760619C 13 KT 13 Received Import Nere Neterived MicroScintTM-20, 1L 6013621 22 EA 22 Received Import Neterived Multi-Element Ca-Zn Lumina Hollow Cathode Lamp, Diameter: 50mm (2in.) N3050203 3 EA 3 Received Import Neterived	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq) BLU5022001MC 2 EA 2 Received Inventory PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog Number NEF1002 NEF1002001PK 6 RL 6 Received Remove Line AlphaScreenRTM Histidine (Nickel Chelate) Detection Kit, 500 assay points 6760619C 13 KT 13 Received Remove Line MicroScintTM-20, 1L 6013621 22 EA 22 Received Remove Line Multi-Element Ca-Zn Lumina Hollow Cathode Lamp, Diameter 50mm (Zin) N3050203 3 EA 3 Received Remove Line

• Verify the **Quantity** of each line and update as needed.

- If a line is not part of this receipt, remove it by clicking the **Remove Line** button.
- 6. Click the **Complete** button located in the lower right corner of the page.
- 7. A confirmation page will appear noting the receipt and PO numbers.

In some cases, a supplier might send multiple shipments to fulfill one PO. For example, an item could be on backorder, or a large order might be shipped in multiple boxes which could be separated during shipping. Because of this, it is possible to perform receiving more than once on a given PO.