

Step-by-Step Guide

Creating Sole Source Procurements in CU Marketplace

In This Guide

This guide discusses the sole source procurement process. Topics covered are:

- ✓ Sole source procurement definition
- ✓ Procedure to create sole source justifications
- ✓ Sole source process cycles
- ✓ Procedure to pay invoices (receiving)

What is sole source procurement?

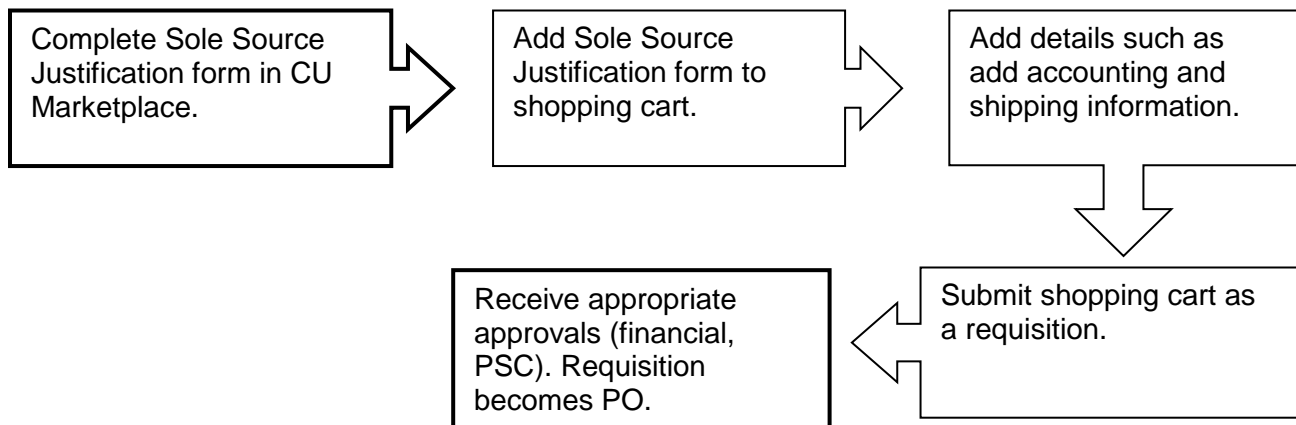
Sole source procurement means a purchase over \$5,000 made without competition, when competition is otherwise required. It is justified when there is only one good or service that can reasonably meet the need and there is only one supplier who can provide the good or service being requested.

Standing Purchase Order (SPO) Sole Sources

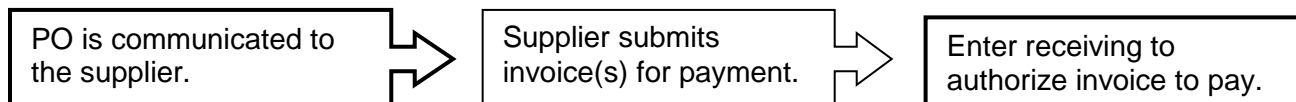
The SPO is a method of procurement used for repetitive purchases from non-catalog suppliers over a period of time, with a total anticipated cost greater than \$5,000. If you have an SPO sole source, refer to the Step-by-Step [Creating \(or Renewing\) SPOs in CU Marketplace](#) for further guidance.

Sole Source Process Cycles in CU Marketplace

Setting up Sole Source Procurements:



Payment Process for Sole Source Procurements:



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Sole Source Creation Procedure

Begin by accessing CU Marketplace via [your campus portal](#). Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

Step #1: Enter Sole Source Justification form in CU Marketplace

1. From the **CU Purchasing & Payment Forms** section of the CU Marketplace home page, select the **Sole Source Justification Form**. The form will appear in a separate window. (If you have an SPO sole source, refer to the Step-by-Step Guide [Creating \(or Renewing\) SPOs in CU Marketplace](#) for further guidance.)
2. Enter the **Supplier** or click the **supplier search** link. Select the appropriate supplier from the list of results.

Can't find your supplier?

A supplier must be set up in CU Marketplace before you can enter a form. Refer to the [CU Supplier Portal web page](#) for guidance.

3. Verify that supplier information is correct. Note that the **Fulfillment Address** is the address to which the resulting Purchase Order (PO) will be issued. A fulfillment address specified by the supplier as preferred will default.

Supplier and Item Information	
Supplier	Airgas Intermountain Inc more info... select different supplier
Fulfillment Address	4810 Vasquez Blvd: (preferred) 4810 Vasquez Blvd Denver, CO 80216-3008 US
Supplier Phone	+1 (303) 321-5440
Distribution	The system will distribute purchase orders using the method(s) indicated below: Email (HTML Body) imt.denver.customer.service@airgas.com

4. Enter the required **Item Information**, indicated by the boldfaced fields.
 - a. If available, enter the **Catalog No.**
 - b. Enter a detailed **Description**, which is sent to the supplier as part of your PO.
 - c. Enter the **Quantity**.
 - d. Enter the **Unit Price**.
 - e. If appropriate, select a different **Packaging (UOM)** measurement.
 - f. Select a **Commodity Code**.
 - g. Click the [add attachments...](#) link to attach **Internal Attachments**, if applicable. These will *not* be dispatched to the supplier with your PO.

Item Information	
Single Item Entry	
Catalog No.	<input type="text"/>
Description	Upgrade of DM100-532, Serial No. 06-330 laser. Components included in this Upgrade and Pricing including trade credit of -\$5,000.00 are as per the attached Quote # RQ11-0919LT3REVA. 73 characters remaining expand clear
Quantity	<input type="text" value="1"/>
Unit Price	<input type="text" value="14695"/>
Packaging (UOM)	<input type="text" value="1"/> EA - Each
Commodity Code	15 - Scientific / Laboratory / Medi...
Internal Attachments add attachment...	

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5. Enter the required sole source **Justification** information.

- a. Enter the **Needs Statement** to describe your purchase need in detail.
- b. Enter the **Features Requirement** to describe the required features and/or capabilities of this procurement.
- c. Enter **Competing Brands Investigated** to detail other suppliers you considered, when/how you contacted them, and exactly why their product or service will not meet requirements.

Step #2: Add form to your shopping cart

1. Use the **Available Actions** dropdown menu located at the top of page and select *Add and go to Cart*; click the **Go** button.
2. 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 #3: Add details to 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.

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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.

6. 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.
8. Click on the **Required field** link or the **edit** button to enter or search for the **SpeedType** and **Account**.
9. 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.

- 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.

- Type the **Account**, or click the **Select from all values....** link to search for the account using the **Custom Field Search**.
- Click the **Save** button.
- 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.
- Click the **Final Review** tab to complete your review. If needed, click the **edit** button to make additional updates.

Step #4: Submit shopping cart as a requisition

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

- Click the **Submit Order** button located in the upper right corner.

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2. A congratulatory message will appear, along with a summary of your requisition.
CU Marketplace will send an email notification to the Approver(s).

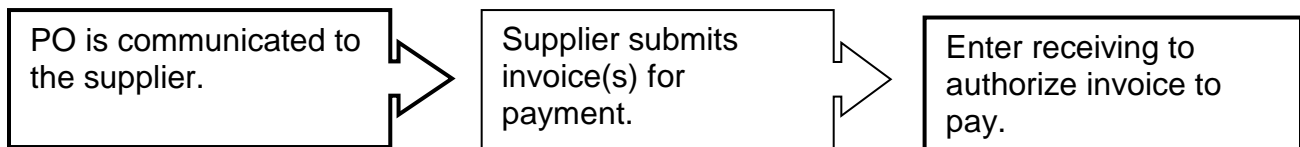
Step #5: Receive appropriate approvals

After the Requestor submits your shopping cart as a requisition, CU Marketplace routes your requisition for financial approval. Financial approval is given by an individual with a fiscal role on the SpeedType (except Officer or Fiscal Staff – Report Recipient) 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:



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, 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 APIInvoice@cu.edu.

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 enter receiving to authorize payment, if required.

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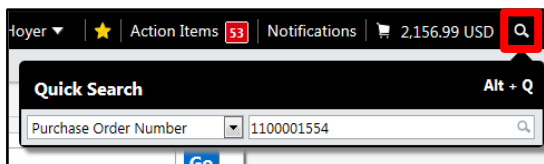
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Enter receiving to authorize invoice(s) to pay:

1. Begin by accessing CU Marketplace via [your campus portal](#). 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.



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**.

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.

3. 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.
4. On the **draft receipts** page, if needed:
 - Enter a unique **Receipt Name**.

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

PO No.	PO Line No.	Product Name	Catalog No.	Qty/UOM ordered	Previous Receipts	Quantity	Add to Inventory	Line Status	Actions
1100001554	1	EasyTidesRTM ATP, [gamma-32P]-, 1mCi (37MBq)	BLU502Z001MC	2 EA		2		Received	Remove Line Receive & Return
1100001554	2	PolyScreenRTM PVDF Hybridization Transfer Membrane, 1 (26.5cm x 3.75m) Roll, Catalog Number NEF1002	NEF1002001PK	6 RL		6		Received	Remove Line Receive & Return
1100001554	3	AlphaScreenRTM Histidine (Nickel Chelate) Detection Kit, 500 assay points	6760619C	13 KT		13		Received	Remove Line Receive & Return
1100001554	4	MicroScintTM-20, 1L	6013621	22 EA		22		Received	Remove Line Receive & Return
1100001554	5	Multi-Element Ca-Zn Lumina Hollow Cathode Lamp, Diameter: 50mm (2in.)	N3050203	3 EA		3		Received	Remove Line Receive & Return

Delete Add PO Save Update **Complete**

- 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 enter receiving more than once on a given PO.