Step-by-Step Guide
Using Non-Catalog Forms to Shop in CU Marketplace

In This Guide

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

- ✓ Non-catalog definition
- ✓ Procedure for non-catalog shopping
- ✓ Non-catalog shopping process cycles
- ✓ Procedure to pay invoices (receiving)

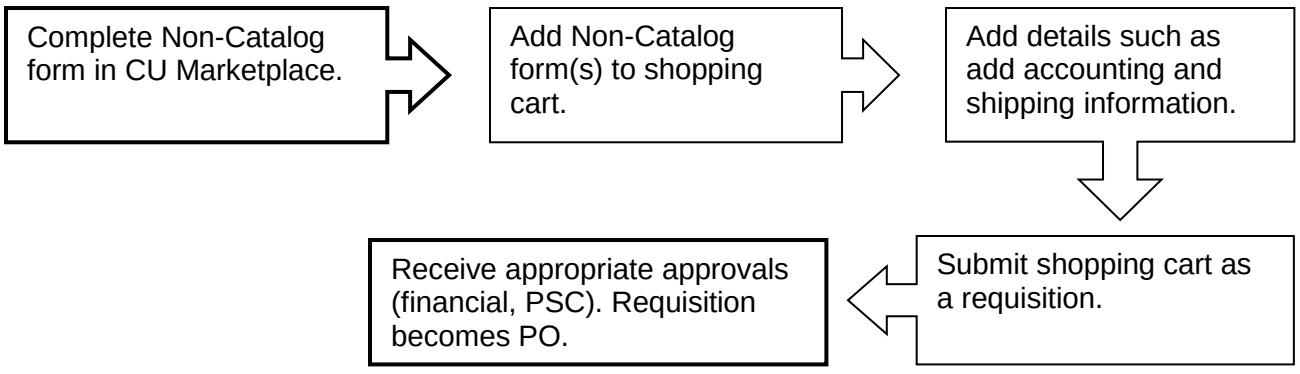
What does "non-catalog" mean?

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. Therefore, "non-catalog" refers to purchases where hosted or punch-out catalogs are not used.

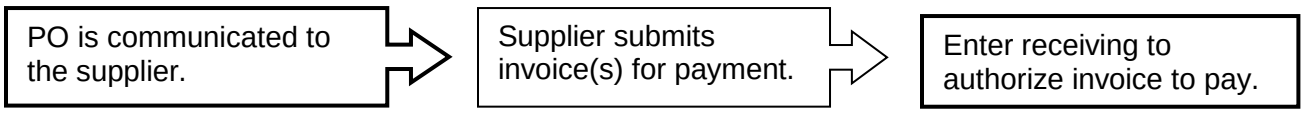
Sole Source Purchases
For purchases over $5,000 where only one supplier can provide the goods or services being requested, instead use the Sole Source Justification form. Refer to the Step-by-Step Guide Creating Sole Source Procurements in CU Marketplace for further guidance.

Non-catalog Process Cycles in CU Marketplace

Shopping Process for Non-catalog Purchases:



Payment Process for Non-catalog Purchases:



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Non-catalog Shopping Procedure

Begin by accessing CU Marketplace via your campus portal. Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.

Step #1: Enter Non-Catalog form in CU Marketplace

1. From the **CU Purchasing & Payment Forms** section of the CU Marketplace home page, select the **Non-Catalog Form**. The form will appear in a separate window.
2. Enter the **Supplier** or click the **supplier search** link. Select the appropriate supplier from the list of results.

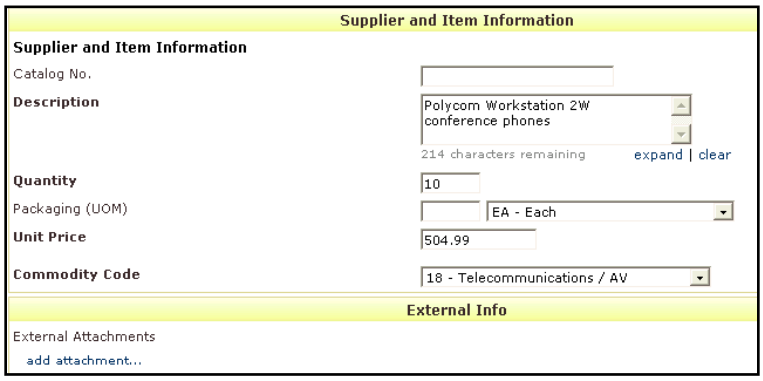
> **Can't find your supplier?**
> A supplier must be set up in CU Marketplace before you can enter a form. Refer to the CU Supplier Portal web page for guidance.

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.

   ***Note*:** If the distribution method is *Manual*, and the PO total is $5,000 or less, you will need to communicate your PO to the supplier.



4. Enter the required **Item Information**, indicated by the boldfaced fields.
   a. If available, enter the **Catalog No**.
   b. Enter a detailed **Description**.
   c. Enter the **Quantity**.
   d. If appropriate, select a different **Packaging (UOM)** measurement.
   e. Enter the **Unit Price**.
   f. Select a **Commodity Code**.



g. If appropriate, click the **add attachments...** link to attach **External Attachments**. External attachments will be dispatched to the supplier with your PO.

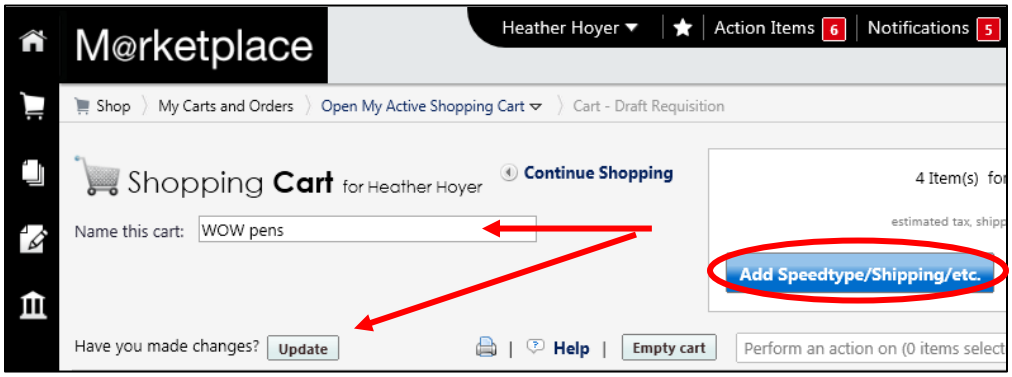
Step #2: Add form to your shopping cart

1. Use the **Available Actions** dropdown menu located at the top of page and select either:
   - *Add and go to Cart* to finalize your request as is; or,
   - *Add to Cart and Return* to add more goods/services to your shopping cart.

   Click the **Go** button.

   (If you select *Add to Cart and Return*, repeat the above steps to add each good/service. Select *Add and go to Cart* when ready to finalize.)

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.

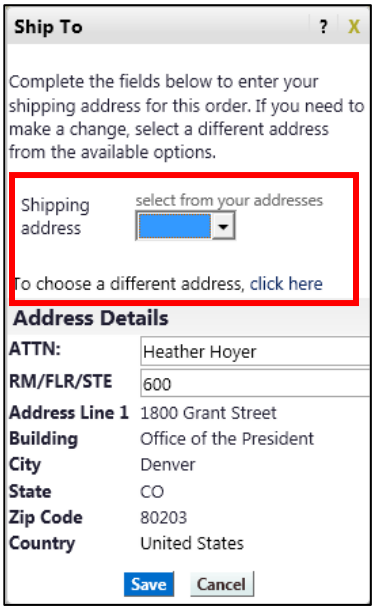
2. Navigation tabs appear at the top of the page and the error icon  highlights where your attention is needed. You can click on the tab to navigate to the section and provide information.



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

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.

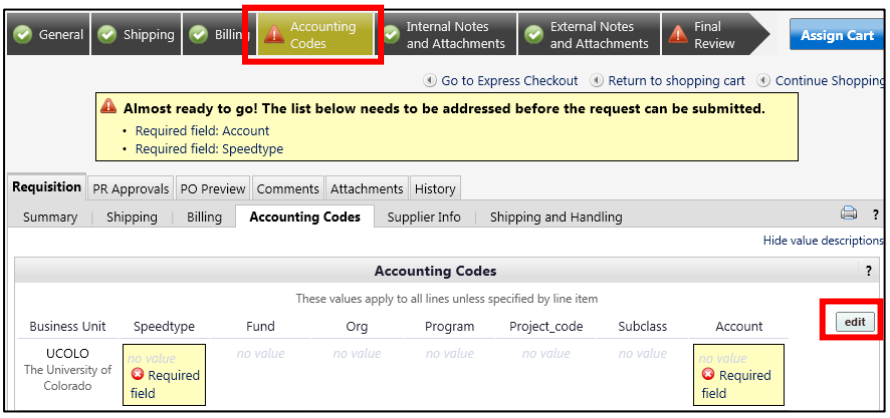
   Or, search for a different shipping address by clicking the **click here** link. Then, click the **select from org addresses** link and enter part of your address in the **Nickname / Address Text** field. Select the appropriate address from the resulting list.

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!

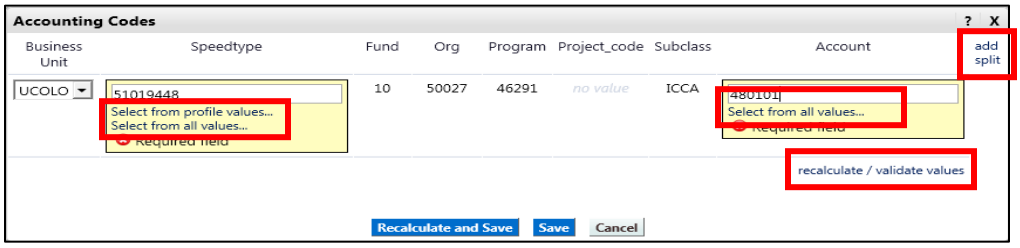
Accounting Information

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**



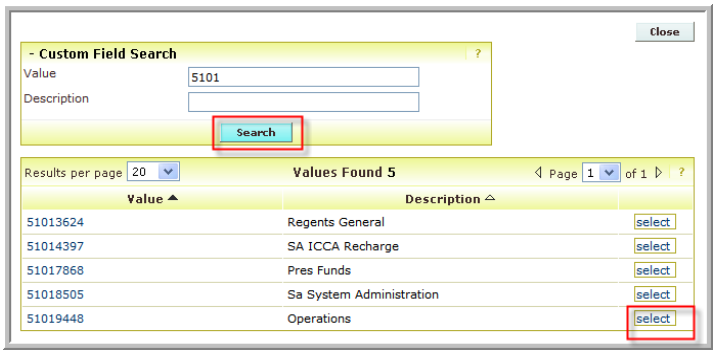
from profile values link to access your SpeedType list.

- 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.



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.

Step #4: 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 #5: 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, if able, communicates your PO to the supplier to place your order. (If the distribution method for the supplier is *Manual*, you will need to communicate the PO to the supplier; see step 3 on page 2.)
- 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 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.

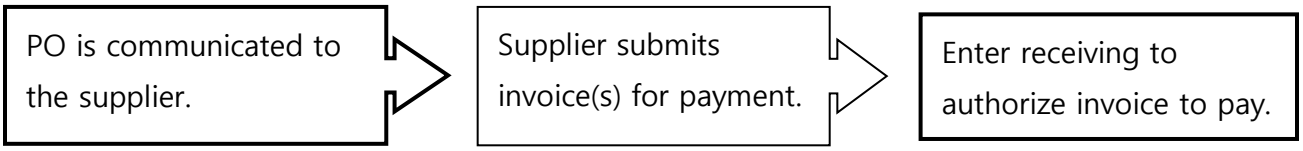
Make similar non-catalog requests frequently?
A template can make requesting future non-catalog purchases faster and easier.

1. Complete the Non-Catalog form as little or as much as you want for your template. It is recommended to not attach documentation as this is usually different for each request.
2. Use the **Available Actions** dropdown (located at the top of the page) to *Add to Favorites* and click the **Go** button.
3. A pop-up window displays for you to name and save this form as is.

To access this template, use your side navigation bar to go to **Shop** > **Shopping** > **View Favorites**.

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 APInvoice@cu.edu.

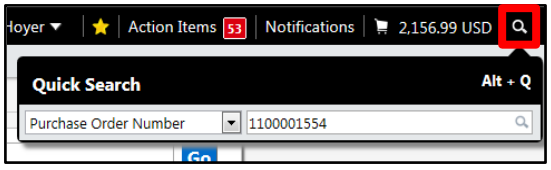
An email notification is sent to the Requestor and any approvers once the invoice is entered as a voucher into CU Marketplace. You can then review the voucher online. The Requestor (or Receiver) should enter receiving.

Enter receiving to authorize invoice(s) to pay:

1. Begin by accessing CU Marketplace via your campus portal. Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.
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

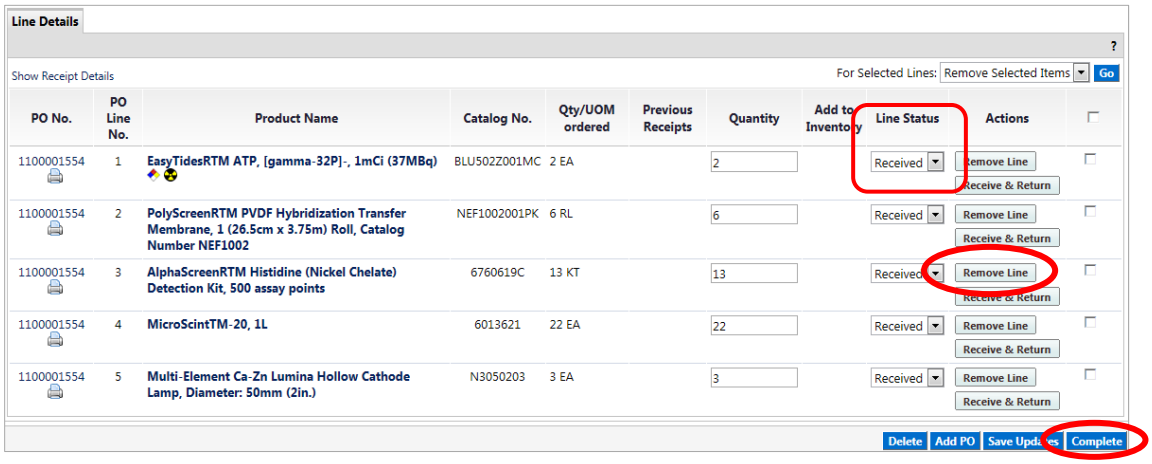
If you do not know the PO or voucher #, perform a Document Search. Use your side navigation bar and go to **Orders & Documents > Document Search > Search Documents**.



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

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**.
   - 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.



   - 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.