Quick Step Guide

CU Marketplace

Finalizing Shopping Carts (Adding SpeedTypes, Shipping, etc.)

- 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.

Codes and Attachments and Attachments Attachments Attachments	🥪 General 🥪 Shipping 📀 Billing	Accounting Codes	Internal Notes and Attachments	External Notes and Attachments	A Final Review
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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.

Ship To	? X
Complete the fie	elds below to enter your
shipping addres	s for this order. If you need to
make a change,	select a different address
from the availab	le options.
Shipping address	select from your addresses
To choose a diff	erent address, click here
Address Det	ails
Address bee	ans
ATTN:	Heather Hoyer
ATTN:	Heather Hoyer
RM/FLR/STE	600
ATTN:	Heather Hoyer
RM/FLR/STE	600
Address Line 1	1800 Grant Street
ATTN:	Heather Hoyer
RM/FLR/STE	600
Address Line 1	1800 Grant Street
Building	Office of the President
ATTN:	Heather Hoyer
RM/FLR/STE	600
Address Line 1	1800 Grant Street
Building	Office of the President
City	Denver
ATTN:	Heather Hoyer
RM/FLR/STE	600
Address Line 1	1800 Grant Street
Building	Office of the President
City	Denver
State	CO
ATTN:	Heather Hoyer
RM/FLR/STE	600
Address Line 1	1800 Grant Street
Building	Office of the President
City	Denver
State	CO
Zip Code	80203
ATTN:	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

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!

Finance & Procurement Help Desk: 303.837.2161 For additional learning resources, visit www.cu.edu/psc.

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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

🧭 General	📀 Shipping) 🤣 Billin	Acco Code	unting s	Internal Note and Attachme	s 📀 Externa ents and Att	al Notes tachments	Final Review	Assign Cart
					④ Go to E	xpress Checkout	Return to sh	opping cart 🔳 C	ontinue Shopping
	 Almost Requir Requir 	ready to g ed field: Acc ed field: Spe	jo! The list l count eedtype	below need	ds to be addre:	ssed before the i	request can b	e submitted.	
Requisition	PR Approvals	PO Previev	v Comments	Attachme	nts History				
Summary	Shipping	Billing	Accounting	Codes	Supplier Info	Shipping and Han	ndling		⊜ ?
								Hide	value descriptions
				A	counting Cod	es			?
			The	e values appl	y to all lines unless	specified by line iter	m		
Business L	Init Speed	type	Fund	Org	Program	Project_code	Subclass	Account	edit
UCOLC The Universi Colorado	ty of Sequence field	uired	no value	no value	no value	no value	no value	no value Required field	

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.

Accounting	Codes						3	x s
Business Unit	Speedtype	Fund	Org	Program	Project_code	Subclass	Account	add split
UCOLO 💌	Stot19448 Select from profile values Select from all values	10	50027	46291		ICCA	Select from all values	
							recalculate / validate values	J
		Recal	culate and	Save Sa	ave 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 Sea	arch		?	
Value	5101			
Description				
	Se	arch		
Results per page 20	*	Values Found 5	🗸 Page 1 🔽	of 1 D
¥alı	ue 🔺	Descriptio	n 🗠	
51013624		Regents General		select
		CA LOCA Deshares		select
51014397		SA ICCA Recharge		Bereet
51014397 51017868		Pres Funds		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.
- Revised 6.23.14

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- 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.

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

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

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