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PROCUREMENT SERVICE CENTER

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CU Marketplace Training [1]

The learning resources below guide you through various aspects within CU Marketplace.

NEW: CU Supplier Portal

The University has a new portal in the Marketplace allowing online supplier registration. In addition to replacing the paper CU W9 process, this online process enables suppliers to view/respond to solicitations (bids) for goods and services, and view the status of their invoices. Find out more [2]

Visit the Navigating within CU Marketplace Guide [3] for an overview of some of the items you'll see when working in CU Marketplace.

Quick Reference Guides

- Shopper [4]
- Requestor [5]
- Approver [6]
- Forms [7]
- Invoice/Match Exception Approver [8] (actual role is ?Approver Invoice?)
- Konica Minolta Quick Reference Guide [9]
- Receiver [10]
- Requisition Status and Approvals [11]
- PO Status [12]
- Transactions on Your Financial Statements [13]
    - Video: What Are PO Encumbrances? [14]
- Viewing Invoice Images [15]

- Voucher Information [16]
- Xerox Quick Reference Guide [17] [18]

Updating Your Profile

- Adding SpeedTypes to your CU Marketplace Profile [19]
- Adding Requestors (Assignees) to Your CU Marketplace Profile [20]
- Adding Ship To Locations to Your CU Marketplace Profile [21]

CU Supplier Portal

- CU Supplier Portal: Inviting Suppliers to Register [22]
- Guide for Suppliers: Supplier Portal Registration [23]

FAQs For the Supplier Portal [24]

Creating Shopping Carts

- Forms Quick Reference Guide [7]
- Using Hosted Catalogs to Shop [25]
- Using Punch-out Catalogs to Shop [26]
- Using Non-Catalog Forms to Shop [27]
- Creating Payment Vouchers in CU Marketplace [28]
- Creating (or Renewing) SPOs [29]
- Creating (or Renewing) Subcontract SPOs [30]
- Creating Sole Source Procurements [31]
- Entering After-the-Fact Purchases [32]
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- Copying Requisitions into New Shopping Carts [34]
- Assigning Shopping Carts to Requestors [35]

Managing Shopping Carts

- Unassigning Shopping Carts [36]
- Modifying Shopping Carts [33]
- Copying Requisitions into New Shopping Carts [34]
- Assigning Shopping Carts to Requestors [35]
- Withdrawing Requisitions from Workflow [37]
- Consolidating Shopping Carts [38]
- Requisition Status and Approvals [11]
- Assigning Substitute Requestors [39]

Using Forms

- Forms Quick Reference Guide [7]
- Using Non-Catalog Forms to Shop [27]
- Creating Payment Vouchers in CU Marketplace [28]
- Creating (or Renewing) SPOs [29]
- Creating Sole Source Procurements [31]
- Entering After-the-Fact Purchases [32]
- Adding Details to Shopping Carts (such as SpeedTypes and Shipping) [40]
- Solutions for PVs that Can't be Processed in CU Marketplace [41]

Processing Shopping Carts

- Processing Assigned Shopping Carts [42]
- Consolidating Shopping Carts [38]
- Adding Details to Shopping Carts (such as SpeedTypes and Shipping) [40]
- Requisition Status and Approvals [11]
- Assigning Substitute Requestors [39]

Approving Requisitions

- Approving Requisitions [43]
- Initiating Email Approvals within CU Marketplace [44]
- Returning Requisitions to Shared Approval Folders [45]
- Assigning Substitute Approvers [46]

Receiving (Creating Quantity Receipts)

- Entering Receiving (Creating Quantity Receipts) for POs [47]
- Documenting Returned Items (& Fixing Receipts That Are Wrong) [48]

Resolving Match Exceptions

- Resolving Match Exceptions [49]
- Placing Vouchers (Invoices) on Hold [50]

Approving SPO Vouchers

- Approving SPO Vouchers [51]
- Initiating Email Approvals within CU Marketplace [44]

- Placing Vouchers (Invoices) on Hold [50]

Reporting and Checking Status

- Searching for Vouchers (Invoices) & Determining Payment Status [52] (Video)
- Determining When Vouchers (Invoices) Will Pay [53]
- Identifying Requestors of POs [54]
- PO Status [12]
- Reviewing Incompatible Access Purchases [55]
- Searching for POs [56]
- Searching for Requisitions [57]
- Transactions on Your Financial Statements [13]
- Viewing Invoice Images [15]
- Voucher Information [16]
- Requisition Status and Approvals [11]

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[3] https://www.cu.edu/psc/navigating-within-cu-marketplace-guide
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[18] https://www.cu.edu/psc/policies/qrg-cu-supplier-portal-should-i-invite-supplier
[19] https://www.cu.edu/psc/policies/adding-speedtypes-your-cu-marketplace-profile
[20] https://www.cu.edu/psc/policies/adding-requestors-assignees-your-cu-marketplace-profile
[21] https://www.cu.edu/psc/policies/adding-ship-locations-your-cu-marketplace-profile
[22] https://www.cu.edu/psc/policies/cu-supplier-portal-inviting-suppliers-register
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[32] https://www.cu.edu/psc/policies/entering-after-fact-purchases

[33] https://www.cu.edu/psc/policies/modifying-shopping-carts
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[53] https://www.cu.edu/psc/policies/determining-when-vouchers-invoices-will-pay
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