CU Marketplace Training \[1\]

CU Marketplace users will notice a new landing page upon logging in. When using the Form Process, a new dashboard will provide key information and guidance that shoppers need to be aware of in order to efficiently procure goods or services from suppliers who do not have established pricing with the university. There will also be new commodity dashboard links across the top of the screen to guide you through the procurement process for each specific commodity.

Guided Buying User Experience Webinar
Marketplace Guided Buying Q&A
  - Marketplace Guided Buying Q&A \[2\]
Guided Buying User Guide
  - User Guide \[3\]
New Guided Buying User Experience Demo
  Learn how to purchase and pay for items using CU Marketplace.

Requesting a role in CU Marketplace
For a list of training requirements and descriptions of the different CU Marketplace roles, visit the Access & Training Requirements guide \[4\].

Logging into CU Marketplace
Log in to your campus portal \[5\] and on the CU Resources Home tab, click the CU Marketplace tile.

Navigating the CU Marketplace Home Page
Take a tour \[6\] of the CU Marketplace home page.

CU Supplier Portal Information

In most cases, external suppliers must register through the CU Supplier Portal in order to be paid by CU. Departments can invite suppliers to register.

  - Guides for Departments: Supplier Portal - Requesting New Suppliers \[7\]
  - Guides for Suppliers: Supplier Portal Registration \[8\]

Exceptions - The following do not need to register through the Supplier Portal:
• **Study subjects.** The study subject’s paper W-9 (IRS form) [9] must accompany the Study Subject Payment form to ensure that the individual is correctly set up as Clinical Trial supplier.

• **Reimbursements/refunds.** Tax documents are not needed to issue reimbursements (via the Non-Employee Reimbursement-International form) or refunds (via the Payment Authorization form).

• **Stipends and cash awards on the Payment Authorization form.** The payee’s paper W-9 (IRS form) [9] must accompany the Payment Authorization form.

• **CU employees and CU students** are not considered suppliers.

### Updating Your Profile

- Adding SpeedTypes to Your CU Marketplace Profile [10]
- Adding Requestors (Assignees) to Your CU Marketplace Profile [11]
- Adding Ship To Locations to Your CU Marketplace Profile [12]

### Shopping (Requisitions)

- Using Punch-out Catalogs [13]
- Using Hosted Catalogs [14]
- Using Non-Catalog Forms [15]
- Creating Payment Vouchers in CU Marketplace [16]
- Creating (or Renewing) SPOs [17]
- Creating (or Renewing) Subcontract SPOs [18]
- Creating Subcontract SPOs with F&A Split [19]
- Creating Sole Source Procurements [20]
- Entering After-the-Fact Purchases [21]
- Forms Quick Reference Guide [22]
- Guided Buying User Guide [3]

To purchase PPE and Disinfecting Supplies, see Requesting COVID Supplies [23].

- Adding Details to Shopping Carts (such as SpeedTypes and Shipping) [24]
- Splitting Accounting Distributions (SpeedTypes/Accounts) [25]
- Consolidating Shopping Carts [26]
- Copying Requisitions into New Shopping Carts [27]
- Modifying Shopping Carts [28]
- Assigning/ Unassigning Shopping Carts to Requestors [29]
- Assigning Substitute Requestors [30]
- Processing Assigned Shopping Carts [31]
- Withdrawing Requisitions from Workflow [32]

### Using Forms

- Forms Quick Reference Guide [22]
- Using Non-Catalog Forms [15]
Creating Payment Vouchers in CU Marketplace [16]
Creating (or Renewing) SPOs [17]
Creating (or Renewing) Subcontract SPOs [18]
Creating Subcontract SPOs with F&A Split [19]
Creating Sole Source Procurements [20]
Requesting COVID Supplies [23]
Entering After-the-Fact Purchases [21]
Solutions for PVs that Can't be Processed in CU Marketplace [33]

Approving Requisitions

Approving Requisitions [34]
Initiating Email Approvals [35]
Returning Requisitions to Shared Approval Folders [36]
Assigning Substitute Approvers [37]

Approving SPO Vouchers

Approving SPO Vouchers [38]
Initiating Email Approvals [35]
Placing Vouchers (Invoices) on Hold [39]

Receiving (Creating Quantity Receipts)

Entering Receiving (Creating Quantity Receipts) for POs [40]
Documenting Returned Items & Fixing Receipts That Are Wrong [41]

Resolving Match Exceptions

Resolving Match Exceptions [42]
Placing Vouchers (Invoices) on Hold [39]
Replying to Comments [43]

Reporting and Checking Status

Identifying Requestors of POs [44]
Looking Up Invoices [45]
PO Status [46]
Reviewing Incompatible Access Purchases [47]
Requisition Status and Approvals [48]
Searching for POs [49]
Searching for Requisitions [50]
Tracking COVID Supply Requests [51]
Transactions on Your Financial Statements [52]
Using Advanced Document Search [53]
Viewing Invoice Images [54]