CU Marketplace Training [1]

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][2].

**Logging into CU Marketplace**
Log in to your [campus portal][3] and on the [CU Resources Home][3] tab, click the [CU Marketplace][3] tile.

**Navigating 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][5]
- [Guides for Suppliers: Supplier Portal Registration][6]

**Exceptions** - The following do not need to register through the Supplier Portal:

- **Study subjects.** The study subject's paper [W-9 (IRS form)][7] 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)][7] 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][8]
- [Adding Requestors (Assignees) to Your CU Marketplace Profile][9]
- Adding Ship To Locations to Your CU Marketplace Profile

**Shopping (Requisitions)**

- Using Punch-out Catalogs
- Using Hosted Catalogs
- Using Non-Catalog Forms
- Creating Payment Vouchers in CU Marketplace
- Creating (or Renewing) SPOS
- Creating (or Renewing) Subcontract SPOS
- Creating Subcontract SPOSs with F&A Split
- Creating Sole Source Procurements
- Entering After-the-Fact Purchases
- Forms Quick Reference Guide

To purchase PPE and Disinfecting Supplies, see Requesting COVID Supplies.

- Adding Details to Shopping Carts (such as SpeedTypes and Shipping)
- Splitting Accounting Distributions (SpeedTypes/Accounts)
- Consolidating Shopping Carts
- Copying Requisitions into New Shopping Carts
- Modifying Shopping Carts
- Assigning/ Unassigning Shopping Carts to Requestors
- Assigning Substitute Requestors
- Processing Assigned Shopping Carts
- Withdrawing Requisitions from Workflow

**Using Forms**

- Forms Quick Reference Guide
- Creating Non-Catalog Forms
- Creating Payment Vouchers in CU Marketplace
- Creating (or Renewing) SPOSs
- Creating (or Renewing) Subcontract SPOSs
- Creating Subcontract SPOSs with F&A Split
- Creating Sole Source Procurements
- Requesting COVID Supplies
- Entering After-the-Fact Purchases
- Solutions for PVs that Can't be Processed in CU Marketplace

**Approving Requisitions**

- Approving Requisitions
- Initiating Email Approvals
• Returning Requisitions to Shared Approval Folders
• Assigning Substitute Approvers

Approving SPO Vouchers

• Approving SPO Vouchers
• Initiating Email Approvals
• Placing Vouchers (Invoices) on Hold

Receiving (Creating Quantity Receipts)

• Entering Receiving (Creating Quantity Receipts) for POs
• Documenting Returned Items & Fixing Receipts That Are Wrong

Resolving Match Exceptions

• Resolving Match Exceptions
• Placing Vouchers (Invoices) on Hold
• Replying to Comments

Reporting and Checking Status

• Identifying Requestors of POs
• Looking Up Invoices
• PO Status
• Reviewing Incompatible Access Purchases
• Requisition Status and Approvals
• Searching for POs
• Searching for Requisitions
• Tracking COVID Supply Requests
• Transactions on Your Financial Statements
• Using Advanced Document Search
• Viewing Invoice Images
• Voucher Information

Source URL: https://www.cu.edu/psc/cu-marketplace-training

Links
[2] https://www.cu.edu/psc/policies/access-training-requirements