Coming November 15th - A New CU Marketplace User Experience!

A new CU Marketplace user experience will be implemented on November 15 that will impact the shopping cart, requisition, purchase order and invoice pages. This new user experience will deliver a more modern and streamlined interface to the CU Marketplace. **Note: current processes and functionality will remain the same, only the visual and page layouts will be updated.**

**How to Preview the New CU Marketplace User Experience**

Video Link [2]

**New User Experience Updates to the Shopping Cart/Checkout Page**

Video Link [3]

**New User Experience Updates to the Requistion and Invoice Approval Pages**

Video Link [4]

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](https://www.cu.edu).

**Logging into CU Marketplace**

Log in to your [campus portal](https://www.cu.edu) and on the CU Resources Home tab, click the CU Marketplace 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 [8]
- Guides for Suppliers: Supplier Portal Registration [9]

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

- **Study subjects.** The study subject’s paper [W-9 (IRS form)](https://www.cu.edu) 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) 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
- Adding Requestors (Assignees) to Your CU Marketplace Profile
- 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 SPOs 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
- Using Non-Catalog Forms
- Creating Payment Vouchers in CU Marketplace
- Creating (or Renewing) SPOs
- Creating (or Renewing) Subcontract SPOs
- Creating Subcontract SPOs 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 [48]
- Requisition Status and Approvals [49]
- Searching for POs [50]
- Searching for Requisitions [51]
- Tracking COVID Supply Requests [52]
- Transactions on Your Financial Statements [53]
- Using Advanced Document Search [54]
- Viewing Invoice Images [55]
- Voucher Information [56]

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

Links
[5] https://www.cu.edu/psc/policies/access-training-requirements
[18] https://www.cu.edu/psc/cu-marketplace-how-creating-or-renewing-spos
[19] https://www.cu.edu/psc/cu-marketplace-how-creating-or-renewing-subcontract-spos
[22] https://www.cu.edu/psc/cu-marketplace-how-entering-after-fact-purchases
[23] https://www.cu.edu/psc/training/quick-reference-guide-forms
[27] https://www.cu.edu/psc/cu-marketplace-how-consolidating-shopping-carts
[29] https://www.cu.edu/psc/cu-marketplace-how-modifying-shopping-carts
[31] https://www.cu.edu/psc/cu-marketplace-how-assigning-substitute-requestors
[33] https://www.cu.edu/psc/cu-marketplace-how-withdrawing-requisitions-workflow
[34] https://www.cu.edu/psc/cu-marketplace-how-solutions-pvs-cant-be-processed-cu-marketplace
[37] https://www.cu.edu/psc/cu-marketplace-how-returning-requisitions-shared-approval-folders
[38] https://www.cu.edu/psc/cu-marketplace-how-assigning-substitute-requisition-approvers
[40] https://www.cu.edu/psc/cu-marketplace-how-placing-vouchers-invoices-hold