About Shopping

Shoppers use CU Marketplace to request the purchase of goods and services. You create and submit shopping carts to a Requestor, who will then finalize the shopping cart and submit your order to the supplier.

There are two ways to shop within CU Marketplace: by catalog or by form. Catalogs are used to request goods from a supplier who offers CU-specific pricing. Forms are used to request goods or services when a catalog cannot be used, or to facilitate specialized business processes such as sole source justifications, Payment Voucher requests, and subcontracts.

Accessing CU Marketplace

1. Log into your campus portal.
2. Locate your **CU Resources** section and, under the **Business Applications** area, select the **CU Marketplace** link.

Reviewing Req/PO Status

One way to review the status of your requisitions or Purchase Orders (PO) is to use your name dropdown along the top of your screen.
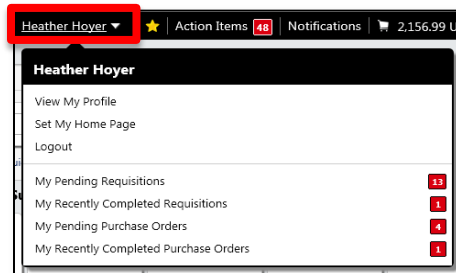
Catalog Shopping

Most catalogs are known as "punch-outs," which connect you to supplier-maintained websites custom to CU. Products selected are returned to the CU Marketplace shopping cart for processing. Some catalogs are "hosted," which means the electronic catalogs are maintained directly within CU Marketplace.

1. From your home page, click the **supplier's icon**. If the **punch-out** link appears, click it to begin your punch-out session.
2. Search for items within the supplier's catalog and add them to your cart.
3. If punch-out shopping, confirm your order within the supplier-maintained website in order to return item(s) to your CU Marketplace shopping cart.
4. Refer to the **Assigning Shopping Carts** instructions for next steps.
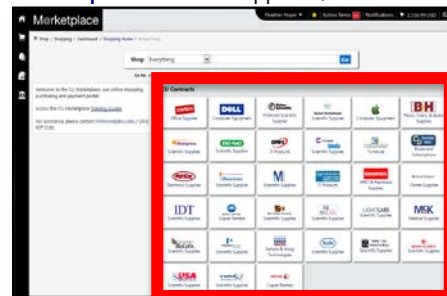
Forms Shopping

A supplier must be set up in CU Marketplace before you can enter a form. If the supplier isn't in the Marketplace, refer to the CU Supplier Portal web page for guidance.

1. From your home page, use the **CU Forms** section to select the appropriate form.
2. Enter all required information (indicated by the **bold** field names).
3. If appropriate, click the **add attachments…** link to attach documents that should be dispatched to the supplier with your Purchase Order (PO).
4. Use the **Available Actions** dropdown menu to select **Add and go to Cart**.
5. Click the **Go** button to return to your shopping cart.
6. Refer to the **Assigning Shopping Carts** instructions for next steps.
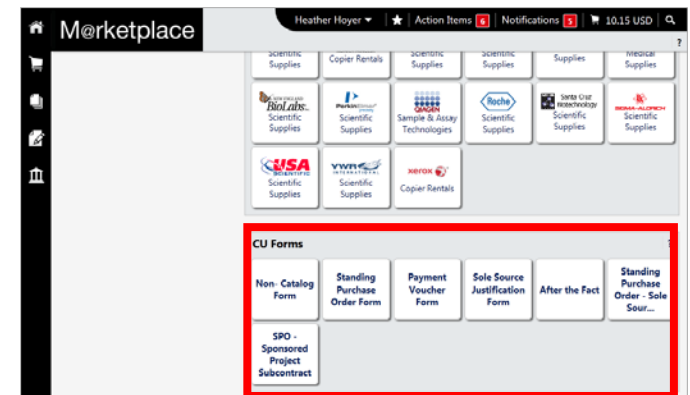
Renaming Shopping Carts

We recommend renaming your carts to better locate the subsequent requisition/PO.

1. If needed, select your shopping cart. One way to do this is to click your active cart icon in the upper right corner of your screen.
2. Click the **View My Cart** button.
3. In the **Name this cart** field, enter your cart's new name.
4. Click the **Update** button.
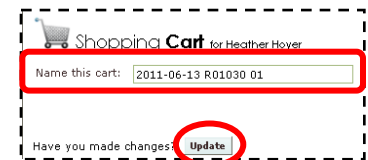
Assigning Shopping Carts

1. If needed, select your shopping cart. One way to do this is to click your active cart icon in the upper right corner of your screen.
2. Click the **View My Cart** button.
3. Click the **Assign Cart** button located in the upper right corner of your screen.
4. Select your Requestor (also referred to as an assignee).
5. Click the **Assign** button.
6. CU Marketplace sends an email notification of the assigned shopping cart to the Requestor.

Adding SpeedTypes, Shipping Addresses, Attachments & Comments

You can assign shopping carts to your Requestor without completing this information.
1. If needed, select your shopping cart. One way to do this is to click your active cart icon 🛒 in the upper right corner of your screen.
2. Click the **Add Speedtype/Shipping/etc.** button. Missing information, such as Shipping Address, SpeedTypes and Accounts will appear as an error at the top of the page ⚠.
3. Enter information as needed by selecting the appropriate section. Click the **Save** button.
4. Refer to the **Assigning Shopping Carts** instructions for next steps.

Splitting Distributions Across SpeedTypes

1. If needed, select your shopping cart. One way to do this is to click your active cart icon 🛒 in the upper right corner of your screen.
2. Click the **Add Speedtype/Shipping/etc.** button.
3. On the **Accounting Codes** tab, click the first **edit** button.
4. Enter the appropriate SpeedType and Account.
5. If splitting the entire order the same:
   a. Click the **Add split** link.
   b. Select **% of Qty** (or other) from dropdown menu. Enter the **split % amount.**
   c. Enter another SpeedType. Repeat as needed.
   d. Once done, click the **Save** button.
6. If splitting by line:
   a. Click the **Save** button.
   b. Scroll to the appropriate line item to change.
   c. Click the **edit** button to the right of the line.
   d. Enter the appropriate SpeedType and/or Account.
   e. To split a line between SpeedTypes, click the **Add split** link, select **% of Qty** (or other) from dropdown menu, and enter the **split % amount.**
   f. Once done, click the **Save** button. Repeat as needed.
7. Refer to the **Assigning Shopping Carts** instructions for next steps.

Unassigning Shopping Carts

Shopping carts can be unassigned if you need to make a change to the shopping cart, or if your need to identify a different Requestor.
1. Use your side navigation bar to go to **Shop** > **My Carts and Orders** > **View Draft Shopping Carts**.
2. Locate the shopping carts and click the **Unassign** button.
3. The cart will return to your **Draft Carts** list for changes and reassignment.

Modifying Shopping Carts

- To add additional items to your shopping cart: Continue to shop.
- To modify forms: Click the form's name from your shopping cart, make updates to the form, and use the **Available Actions** dropdown to save changes.
- To modify hosted catalog items: Use the **Update** and **Remove** buttons associated with each line item.
- To modify punch-out catalog items: Use the **Modify Items** link to be transferred back to your punch-out session and make changes. If the **Modify Items** link doesn't appear, delete all of the items in your cart from that supplier and begin a new punch-out session.

Once Your Shopping Cart is Assigned to a Requestor...

- The Requestor finalizes your shopping cart, which turns it into a requisition.
- If needed, the requisition is approved by the appropriate Approvers.
- The requisition then becomes a Purchase Order (PO), which is automatically distributed to the supplier via the supplier's preferred method.
- Some forms will *not* dispatch an order to the supplier, such as the After the Fact and Payment Voucher forms.
- Suppliers are provided with the Requestor's contact information, as supplied within CU Marketplace, and will contact the Requestor directly with questions or concerns.

Adding Requisition Notes and Attachments

- **Internal Notes and Attachments** and **External Notes and Attachments** may be added to the requisition during the approval process.
- All attached documentation will remain with the requisition and Purchase Order indefinitely.
- Some suppliers have the ability to accept external notes and attachments with a Purchase Order. Notifications will indicate if notes and attachments are accepted.
1. Locate the requisition. One way to use your name dropdown along the top of your screen (see previous page).
2. Click the **Requisition** page tab, **Summary** page sub-tab.
3. Click the appropriate **add attachment...** link. (External attachments are sent to the supplier, internal attachments are used for internal purposes.) Add the file or URL. Click the **Save** button.

Requisition & Purchase Order History

Your requisitions and Purchase Orders (POs) are permanently stored within CU Marketplace.
1. Using your side navigation bar, go to **Orders & Documents** > **Document Search** > **Search Documents**.
2. Use the links along the top to select either **my requisitions** or **my purchase orders**.
3. A list of results will appear. Use the left side of your screen to refine your search by options such as date range, supplier, user, or status.
4. Click the **requisition** or **Purchase Order number** to view the document.