



CSUBUY USERS GUIDE

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Overview

CSUBUY is a one-stop shop to access preferred suppliers and vendors for ordering department supplies. CSUBUY Shopper and Requester roles perform several actions related to searching for goods, creating shopping carts, placing orders and tracking the order status.

Shoppers will browse through the Showcase Catalogs for supplies and create a shopping cart, and then assign the cart to a designated Department Requester (also referred to as a “Pro Cardholder”).

Requesters (or Pro Cardholders) are notified when orders are ready to be placed. Requesters can finalize orders and track the order statuses.

End Users are encouraged to view the following ‘training on-demand’ videos through Microsoft Stream:

- CSUBUY – Setting Up Your Profile
- CSUBUY – How to Shop for Supplies
- CSUBUY – How to Submit and Pay

Objectives:

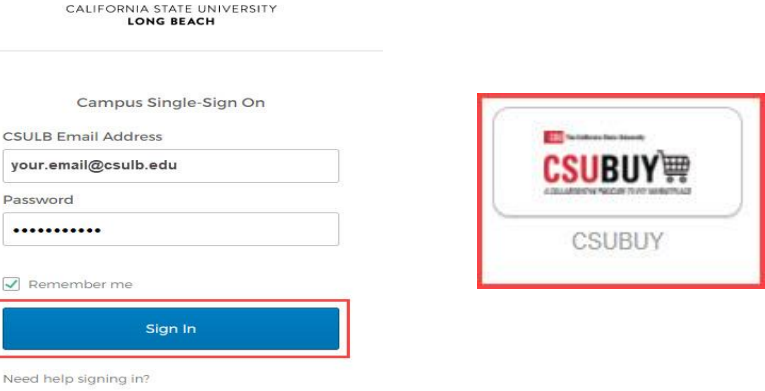
In this training guide, you will learn the key features and functionalities that Shoppers and Requesters perform in the CSUBUY Marketplace.

DISCLAIMER: All purchases made on the CSUBUY Marketplace must follow the **How to Purchase and Pay** and **Procurement Card Guidelines**.

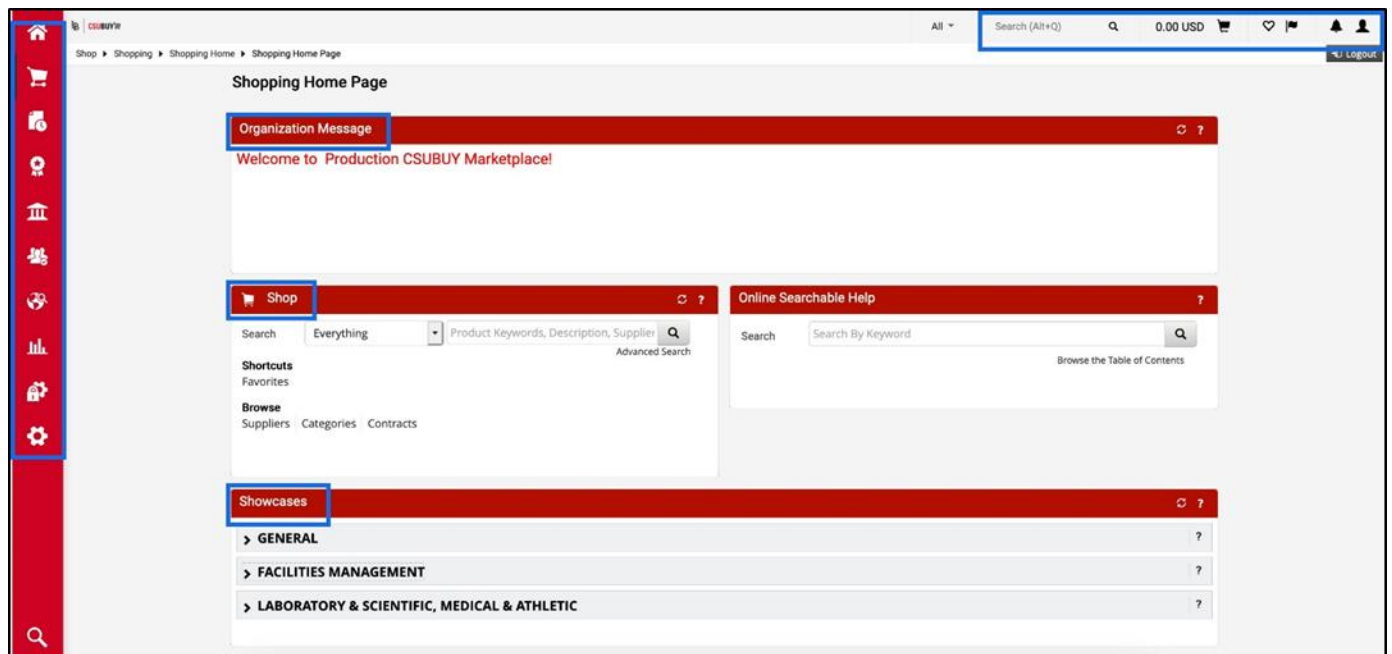
1.0 Creating a Profile

All CSUBUY users must be able to access the Campus Users Portal (or Single-Sign On). Then, all Shoppers and Requesters must create a CSUBUY profile.

1.1 Single-Sign On

Processing Steps / Field Name	
<p>Step 1: Navigate to Campus Single-Sign On.</p> <p>Step 2: Enter your Campus email and password.</p> <p>Step 3: Click "Sign In".</p> <p>Step 4: Click the CSUBUY chiclet to open the CSUBUY Shopping Home Page.</p>	

1.2 CSUBUY Shopping Home Page



1.2.1 Shopping Home Page Ribbon

The shopping home page ribbon features icons that represent system notifications:

- Search icon – use to search for products/items
- Shopping Cart icon – use to view products/items in the shopping cart
- Action Items (flag) icon – displays the number of shopping carts waiting for action

- Notifications (bell) icon – displays a list of all notifications
- User Profile icon – use to view and manage profiles, and link to other home page components

1.2.2 Navigation Tools

The navigation pane located on the left margin displays navigation tools, such as the shopping cart and order details. Other icons are links to Accounts Payable receipts, and other administrative settings.

1.2.3 Organization Message

Purchasing may use this section of the home page to enter messages directed to CSUBUY users.

1.2.4 Shop

The Shop section allows users to search for products/items using the search filter, saved favorites, and browse by supplier, category, or contracts.

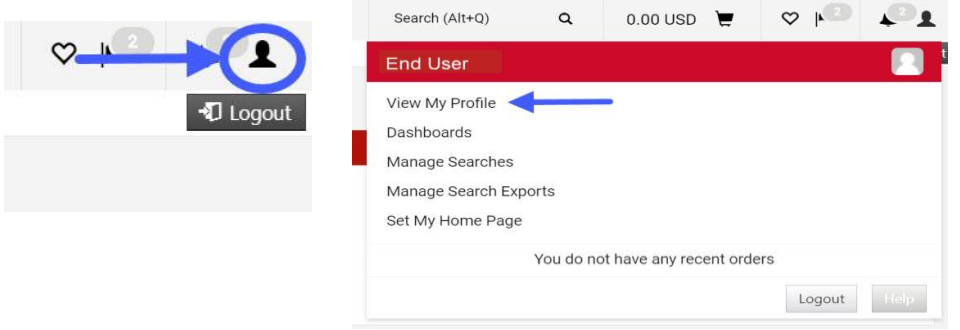
1.2.5 Showcases

Users can access suppliers’ shopping sites by clicking any of the chicklets. The CSUBUY Marketplace has identified suppliers by their merchandise and popular campus needs (i.e., General; Facilities Management; and Laboratory & Scientific, Medical & Athletic).

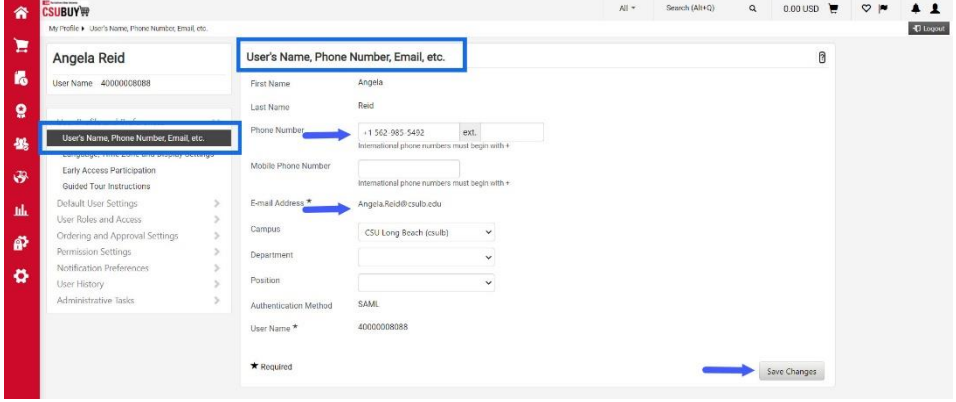
2.0 Set Up a User Profile

All end users must set up their user profile before shopping and placing orders as Shoppers and Requesters.

2.1 Access the User Profile Icon

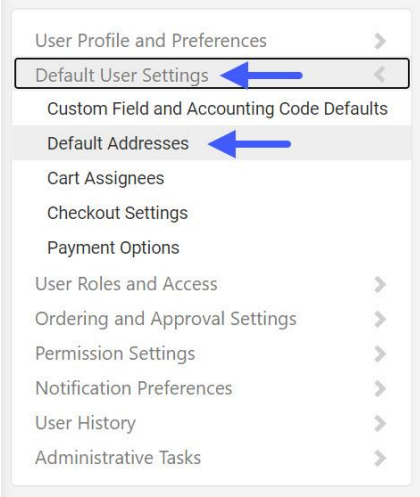
Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page</p> <p>Step 2: Select “View My Profile” from the drop-down menu.</p> <p>This action opens the end user’s profile, displaying the user’s name, phone number, email, etc.</p>	

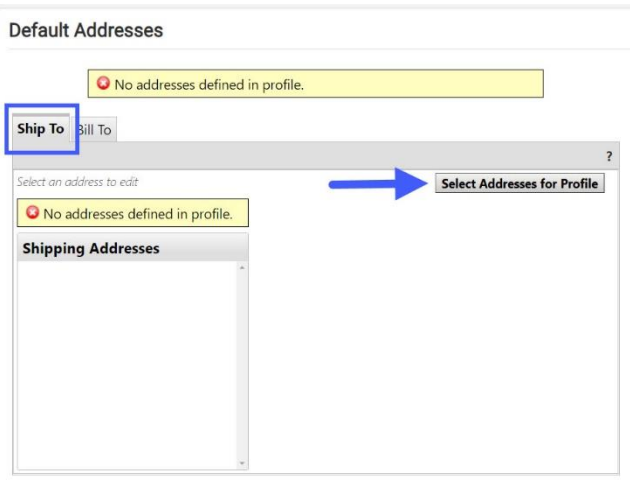
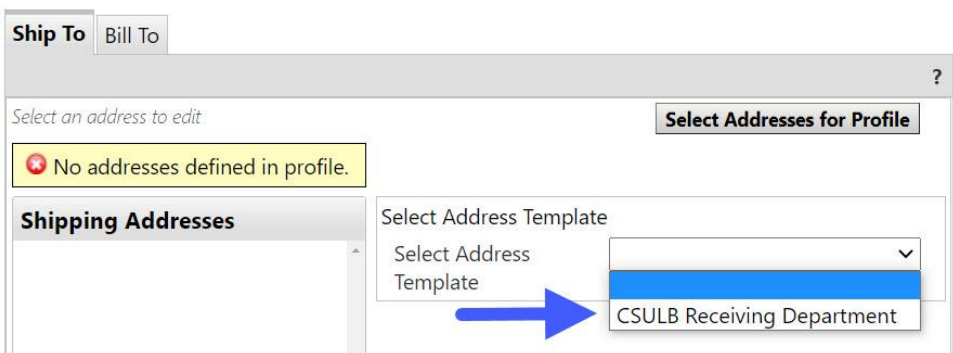
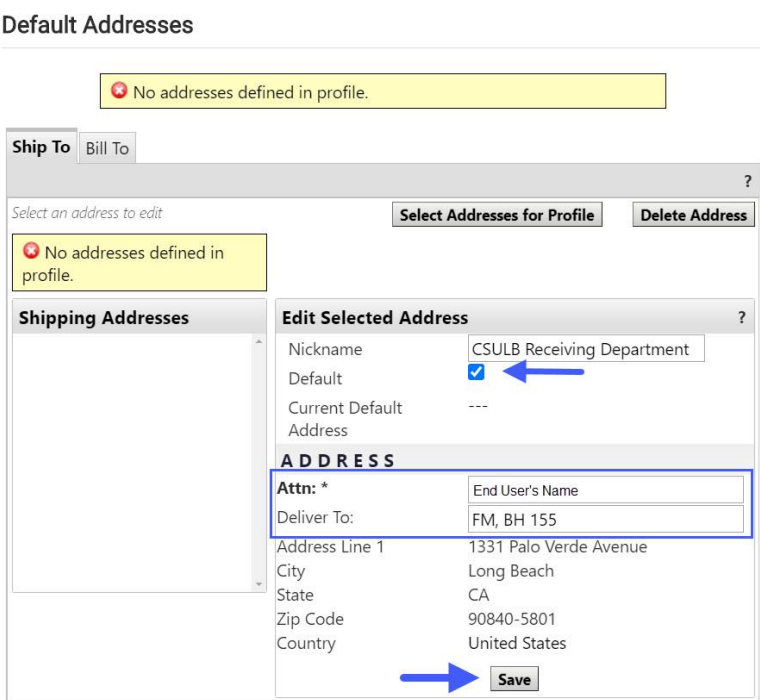
2.2 User's Name, Phone Number, Email, etc.

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Type the phone number. Include the extension, if applicable.</p> <p>Note: the email address is required and defaults to the CSULB email address.</p> <p>The Department and Position fields are not editable fields.</p> <p>Step 2: Click on "Save Changes".</p>	

2.3 Default Ship To Address

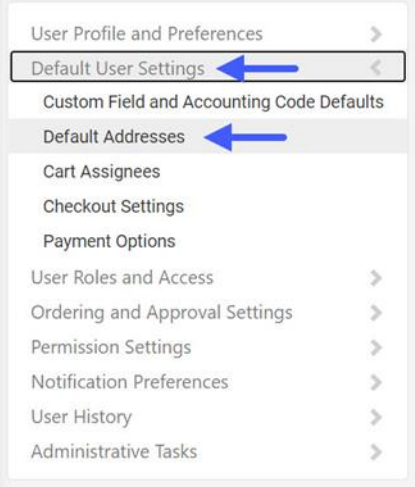
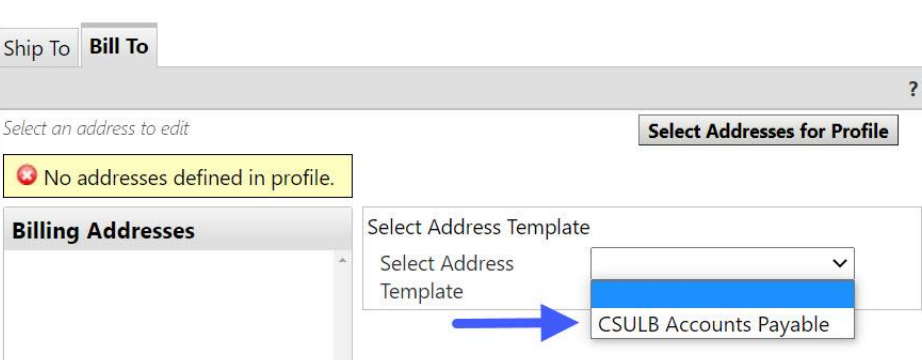
End users must set up their default Ship-To address, which is the campus location where suppliers will ship purchased items.

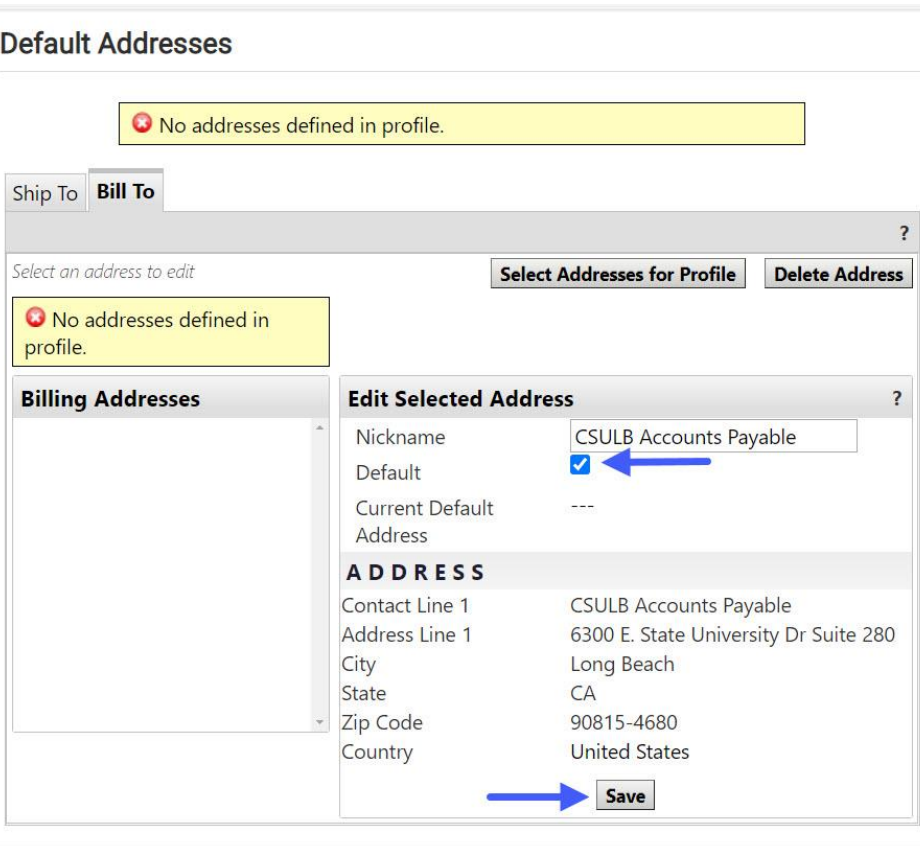
Processing Steps / Field Name	Screenshot / Description
<p>Step 1: In the User Profile, select "Default User Settings", then "Default Addresses" from the drop-down menu.</p>	

Processing Steps / Field Name	Screenshot / Description
<p>Step 2: On the <u>Ship To</u> tab, click on “Select Addresses for Profile”.</p>	
<p>Step 3: Click on “CSULB Receiving Department” from the <u>Select Address Template</u> drop-down menu.</p>	
<p>Step 4: Check the “Default” box. The user’s name will appear in the “Attn.” field.</p> <p>Step 5: In the “Deliver To” field, type the Department Name, followed by a comma; then the Department or Building Number.</p> <p>Step 6: Click on “Save”.</p> <p>This action saves <u>CSULB Receiving Department</u> as the end user’s default shipping address, and notes the department for purchased deliveries.</p> <p>NOTE: To change the <u>Ship To – Deliver To</u> address, click “Delete Address”, then enter a different address in the “Deliver To” field.</p>	

2.4 Default Bill To Address

End users must set Accounts Payable as the default billing address for payment for purchased items.

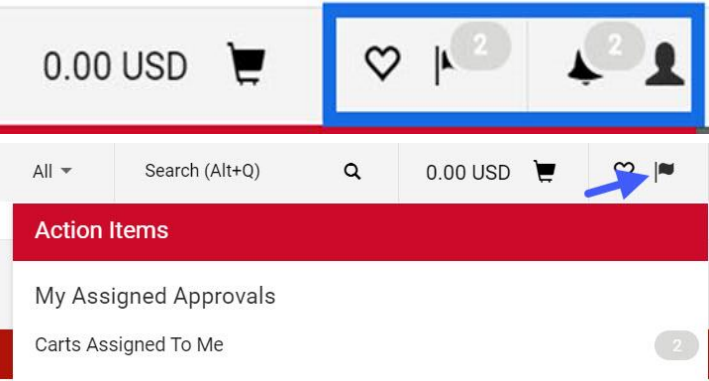
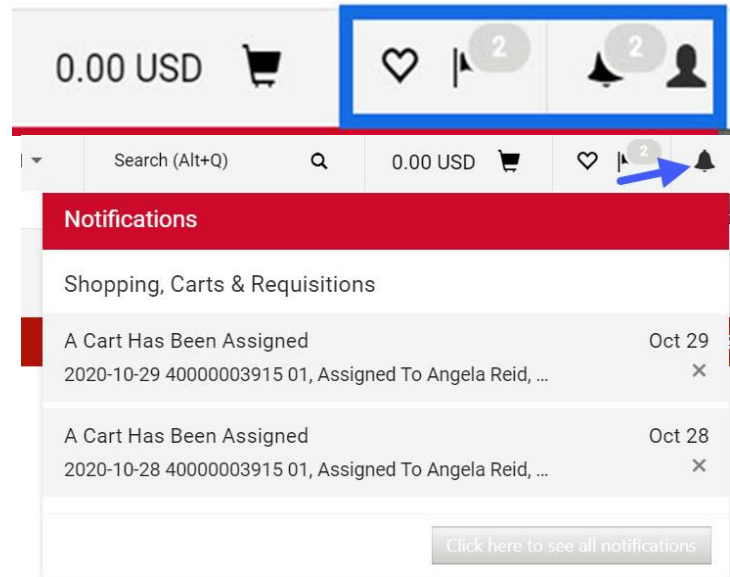
Processing Steps / Field Name	Screenshot / Description
<p>Step 1: In the User Profile, select "Default User Settings", then "Default Addresses" from the drop-down menu.</p>	
<p>Step 2: On the <u>Bill To</u> tab, click "Select Addresses for Profile".</p>	
<p>Step 3: From the <u>Select Address Template</u> drop-down menu, click "CSULB Accounts Payable", which is the CSULB default billing address.</p>	

Processing Steps / Field Name	Screenshot / Description
<p>Step 4: Check the “Default” box.</p> <p>Step 5: Click “Save”.</p> <p>This action saves the default shipping address.</p>	

3.0 Action Items and Notifications

The CSUBUY system notifies all end users when shopping actions occur. For example, Shoppers are notified if a Requester rejects a cart or returns items from the shopping cart; and Requesters are notified when there are assigned shopping carts waiting for them to place the order.

All users may choose how they want to receive notifications: either by email, or by checking the action item and notification icons in the ribbon at the top of the CSUBUY shopping home page when logging into CSUBUY (or push notifications). Users may also choose both options.

Action Items/Notifications	Screenshot / Description
<p>Action Items: A number next to the <u>flag icon</u> indicates the number of shopping carts processed by a Shopper, assigned to the Requester and waiting for the Requester to complete the purchase process.</p>	
<p>Notifications: A number next to the <u>bell icon</u> indicates that there is a list of notifications related to the users' notification preferences (i.e., Shopping Carts & Requisitions).</p> <p>NOTE: In this example, a Shopper will see a list of the carts assigned to the Requester for their approval.</p> <p>Users may click on the individual notification to view the cart details, or select "Click here to see all notifications" to see all listed notifications.</p>	

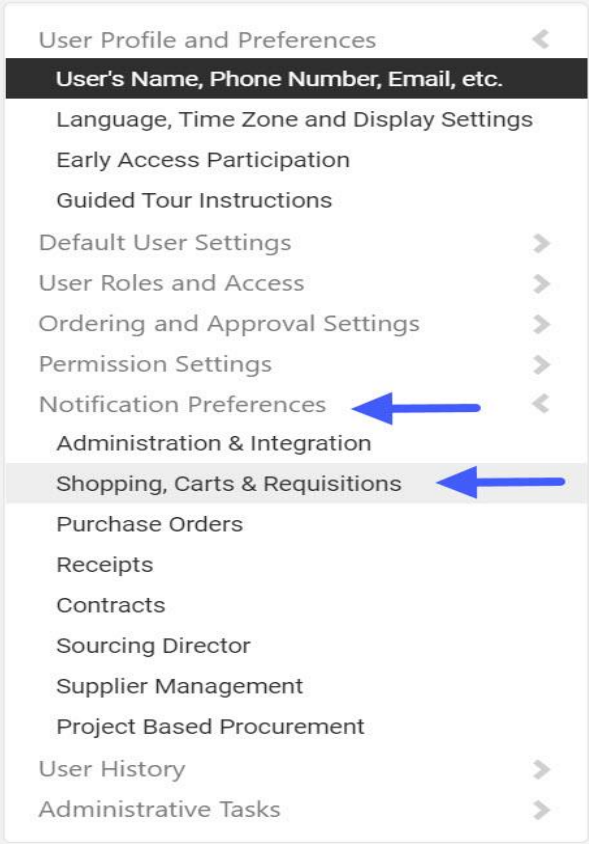
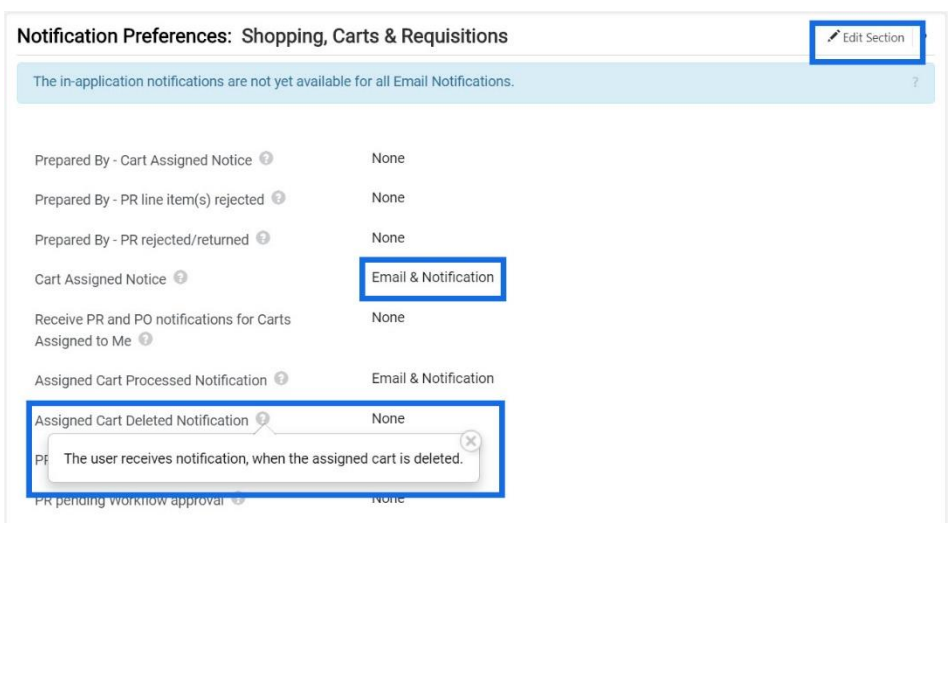
3.1 Notification Preferences

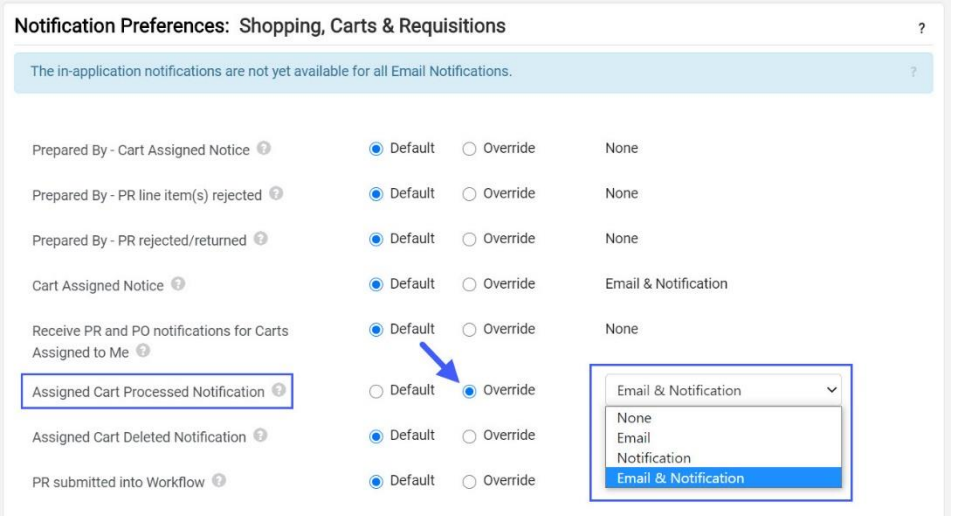
When end users receive access to CSUBUY, their profile will set default notifications based on their role. Shoppers and Requesters notification preferences will differ due to the notification category (i.e., Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, or Receipts).

Users may decide if they wish to receive notifications for various actions, as well as edit the notification method (i.e., email or push notifications).

3.1.1 View Notification Preferences

This user guide is using Shopping, Carts & Requisitions notification preferences in the guide examples.

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: In the User Profile, select “Notification Preferences”, then “Shopping, Carts & Requisitions” from the user profile drop-down menu.</p>	
<p>The Notification Preferences page contents include the following:</p> <p>None: notification that indicates there is no notification preference for a specific action.</p> <p>Email & Notification: notification that indicates users will receive email and push notifications when logging into the CSUBUY Marketplace.</p> <p>Information: icon provides a description of the notification.</p> <p>To make changes:</p> <p>Step 2: Click the “Edit Section” link to make changes to notification preferences.</p>	

Processing Steps / Field Name	Screenshot / Description																								
<p>Step 3: Choose the notification to change and select the “Override” option.</p> <p>Step 4: Select the notification method from the drop-down menu.</p> <p>Step 5: Click “Save Changes” at the bottom of the page.</p>	 <p>Notification Preferences: Shopping, Carts & Requisitions</p> <p>The in-application notifications are not yet available for all Email Notifications.</p> <table border="1"> <tr> <td>Prepared By - Cart Assigned Notice</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td>None</td> </tr> <tr> <td>Prepared By - PR line item(s) rejected</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td>None</td> </tr> <tr> <td>Prepared By - PR rejected/returned</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td>None</td> </tr> <tr> <td>Cart Assigned Notice</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td>Email & Notification</td> </tr> <tr> <td>Receive PR and PO notifications for Carts Assigned to Me</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td>None</td> </tr> <tr> <td>Assigned Cart Processed Notification</td> <td><input type="radio"/> Default <input checked="" type="radio"/> Override</td> <td> <div style="border: 1px solid black; padding: 2px;"> Email & Notification None Email Notification Email & Notification </div> </td> </tr> <tr> <td>Assigned Cart Deleted Notification</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td></td> </tr> <tr> <td>PR submitted into Workflow</td> <td><input checked="" type="radio"/> Default <input type="radio"/> Override</td> <td></td> </tr> </table>	Prepared By - Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	None	Prepared By - PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None	Prepared By - PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None	Cart Assigned Notice	<input checked="" type="radio"/> Default <input type="radio"/> Override	Email & Notification	Receive PR and PO notifications for Carts Assigned to Me	<input checked="" type="radio"/> Default <input type="radio"/> Override	None	Assigned Cart Processed Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	<div style="border: 1px solid black; padding: 2px;"> Email & Notification None Email Notification Email & Notification </div>	Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override		PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override	
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PR submitted into Workflow	<input checked="" type="radio"/> Default <input type="radio"/> Override																								

4.0 CSUBUY Shoppers

End users authorized to shop for supplies for their CSULB Department will shop in the CSUBUY Marketplace. This section will provide instructions on:

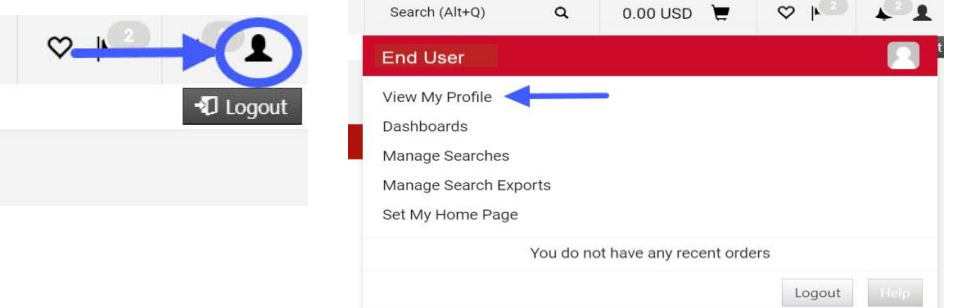
1. how to select cart assignees who are authorized Pro Cardholders (aka Requesters) who will pay for purchases;
2. how to shop for items;
3. creating a shopping cart;
4. and, assigning the shopping cart to a Requester.

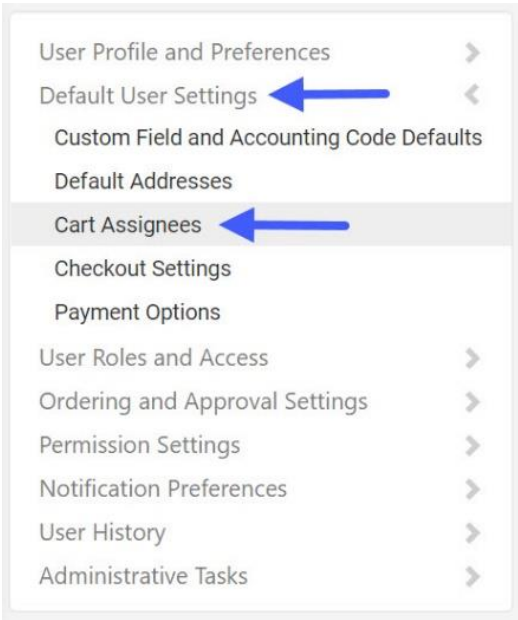

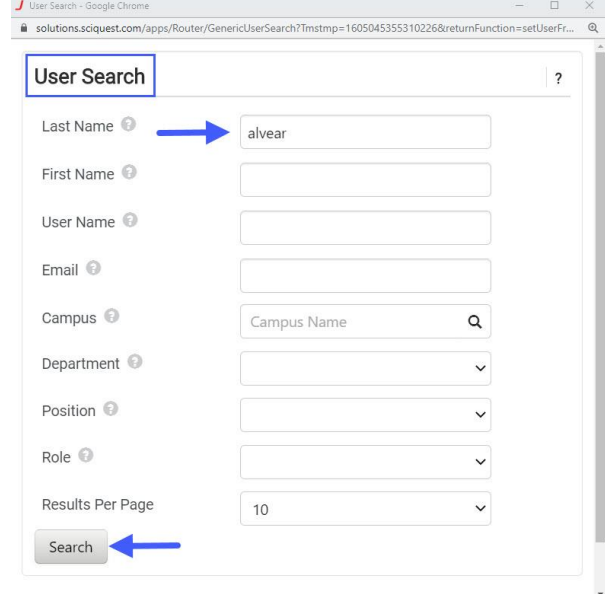
Note that all purchases made on the CSUBUY Marketplace must follow the **How to Purchase to Pay** and **Procurement Card Guidelines**.

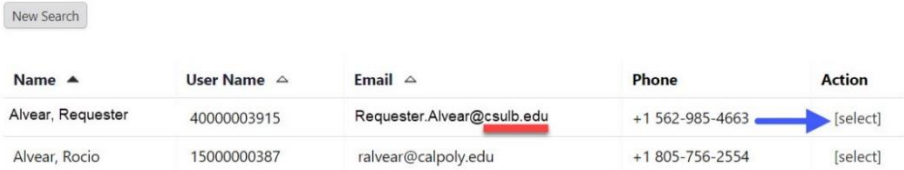
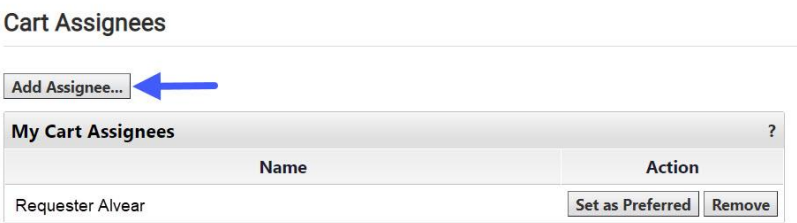

4.1 Cart Assignees

Shoppers must designate the Pro Cardholder(s) in their department with a Requester role to whom they will assign shopping carts for review and purchase completion.

Follow the next steps to select one or more Requesters.

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page</p> <p>Step 2: Select “View My Profile” from the drop-down menu.</p>	 <p>Search (Alt+Q) 0.00 USD</p> <p>End User</p> <ul style="list-style-type: none"> View My Profile Dashboards Manage Searches Manage Search Exports Set My Home Page <p>You do not have any recent orders</p> <p>Logout Help</p>

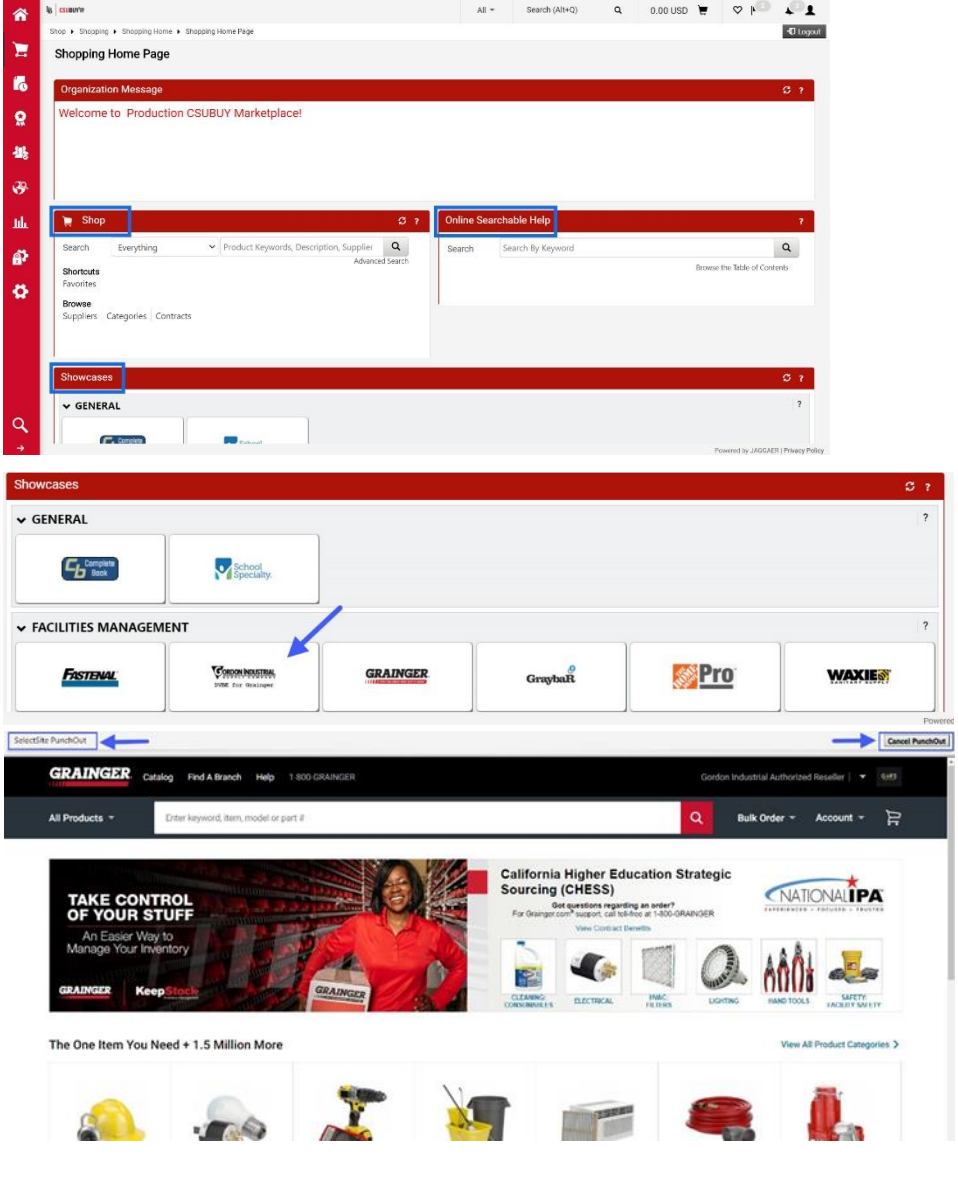
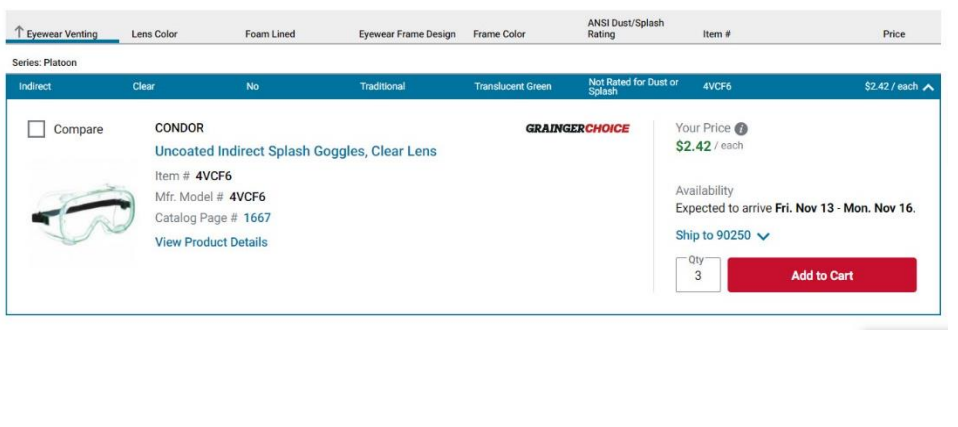
Processing Steps / Field Name	Screenshot / Description
<p>Step 3: In the User Profile, select “Default User Settings, then “Cart Assignees” from the drop-down menu.</p> <p>NOTE: In order for the Assignee names to be visible, the CSULB end user must have previously logged into CSUBUY.</p> <p>If the Assignee has not logged into CSUBUY, consult with the Department ASM.</p>	 <p>A screenshot of a user profile settings menu. The menu items are: User Profile and Preferences, Default User Settings (highlighted with a blue arrow), Custom Field and Accounting Code Defaults, Default Addresses, Cart Assignees (highlighted with a blue arrow), Checkout Settings, Payment Options, User Roles and Access, Ordering and Approval Settings, Permission Settings, Notification Preferences, User History, and Administrative Tasks.</p>
<p>Step 4: Click “Add Assignee”.</p> <p>This action opens a User Search page with a pop-up window with various search fields.</p>	 <p>A screenshot of the 'Cart Assignees' page. At the top is the title 'Cart Assignees'. Below it is a button labeled 'Add Assignee...' with a blue arrow pointing to it. Underneath is a section titled 'My Cart Assignees' with a table. The table has two columns: 'Name' and 'Action'. One row is visible with the name 'Requester Alvear' and two buttons: 'Set as Preferred' and 'Remove'.</p>
<p>Step 5: Type the last name and first name of the chosen Department Requester (aka the Assignee).</p> <p>Step 6: Click “Search”.</p>	 <p>A screenshot of a web browser showing a 'User Search' form. The form has several input fields: Last Name (containing 'alvear'), First Name, User Name, Email, Campus (with a search icon), Department (dropdown), Position (dropdown), Role (dropdown), and Results Per Page (set to 10). A 'Search' button is at the bottom, highlighted with a blue arrow.</p>

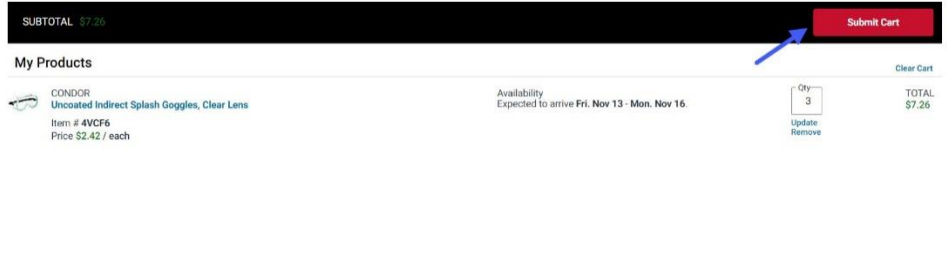
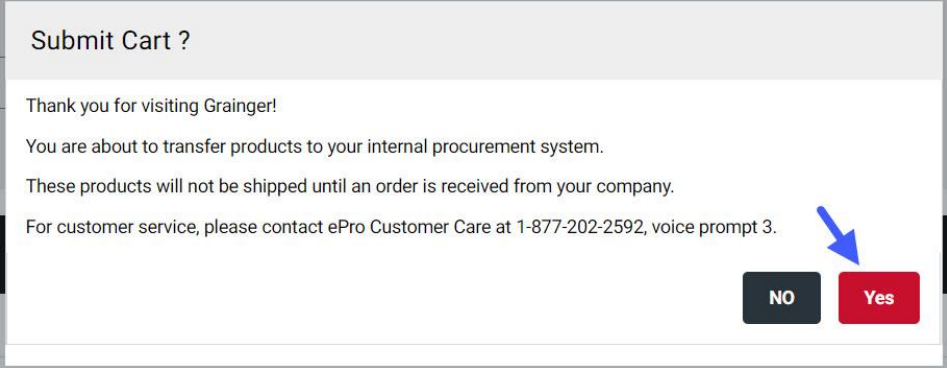
Processing Steps / Field Name	Screenshot / Description															
<p>Step 7: After verifying the correct Requester's name and email under the <u>Action</u> column, click the "select" link.</p> <p>NOTE: search results can include CSUBUY end users from other CSU campuses. When searching for your Department Requesters who may have a popular last and/or first name, be sure to verify the campus email address (@csulb.edu).</p>	 <p>The screenshot shows a search results table with the following data:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>User Name</th> <th>Email</th> <th>Phone</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Alvear, Requester</td> <td>40000003915</td> <td>Requester.Alvear@csulb.edu</td> <td>+1 562-985-4663</td> <td>[select]</td> </tr> <tr> <td>Alvear, Rocio</td> <td>15000000387</td> <td>ralvear@calpoly.edu</td> <td>+1 805-756-2554</td> <td>[select]</td> </tr> </tbody> </table>	Name	User Name	Email	Phone	Action	Alvear, Requester	40000003915	Requester.Alvear@csulb.edu	+1 562-985-4663	[select]	Alvear, Rocio	15000000387	ralvear@calpoly.edu	+1 805-756-2554	[select]
Name	User Name	Email	Phone	Action												
Alvear, Requester	40000003915	Requester.Alvear@csulb.edu	+1 562-985-4663	[select]												
Alvear, Rocio	15000000387	ralvear@calpoly.edu	+1 805-756-2554	[select]												
<p>Step 8: To add more assignees, follow steps 4-7.</p>	 <p>The screenshot shows the 'Cart Assignees' section with an 'Add Assignee...' button highlighted by a blue arrow. Below it is a table titled 'My Cart Assignees' with the following data:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Requester Alvear</td> <td>Set as Preferred Remove</td> </tr> </tbody> </table>	Name	Action	Requester Alvear	Set as Preferred Remove											
Name	Action															
Requester Alvear	Set as Preferred Remove															
<p>Step 9: When adding at least one more assignee, select a Requester as the preferred Requester. The preferred Requester will be the default Pro Cardholder who will review and approve the shopping carts and complete the purchase process.</p> <p>If necessary, Shoppers may also remove Requesters.</p>	 <p>The screenshot shows the 'Cart Assignees' section with an 'Add Assignee...' button. Below it is a table titled 'My Cart Assignees' with the following data:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Requester Alvear (Preferred Assignee)</td> <td>Remove Preferred Remove</td> </tr> <tr> <td>Requester Murray</td> <td>Set as Preferred Remove</td> </tr> </tbody> </table>	Name	Action	Requester Alvear (Preferred Assignee)	Remove Preferred Remove	Requester Murray	Set as Preferred Remove									
Name	Action															
Requester Alvear (Preferred Assignee)	Remove Preferred Remove															
Requester Murray	Set as Preferred Remove															

4.2 Shopping for Department Supplies

Shoppers will shop for department supplies in the CSUBUY Marketplace from various contract suppliers.

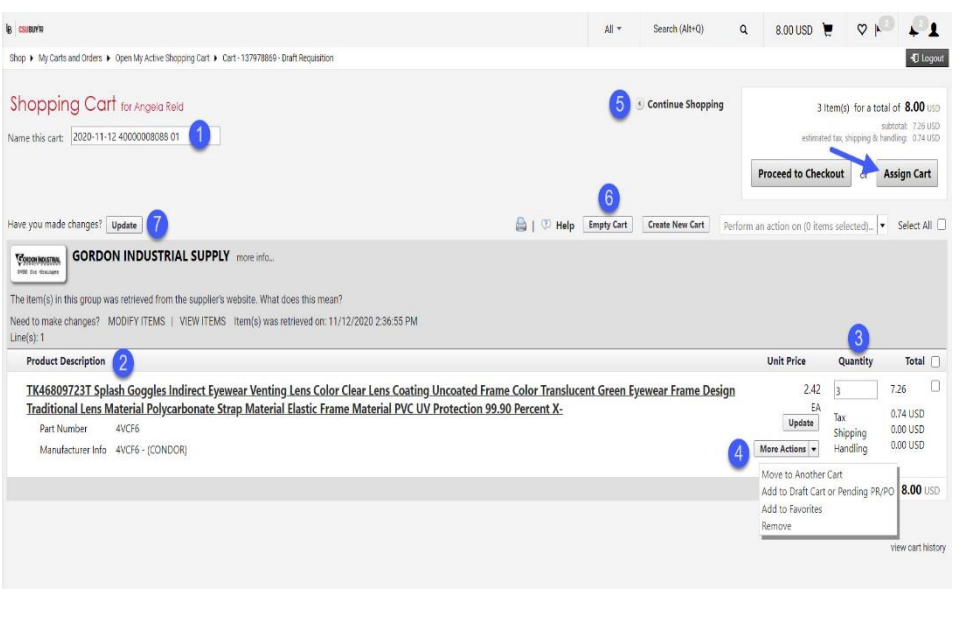
4.2.1 Creating a Cart

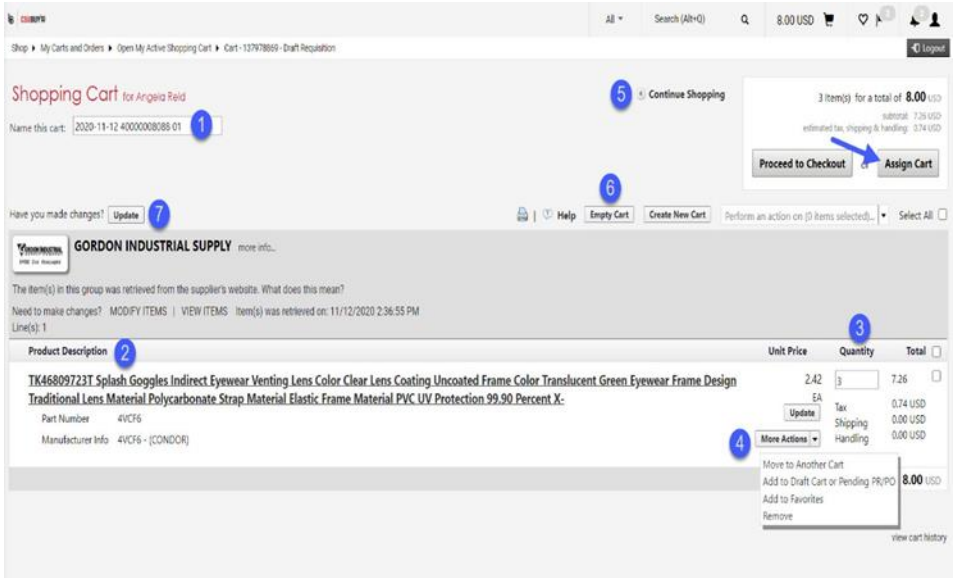
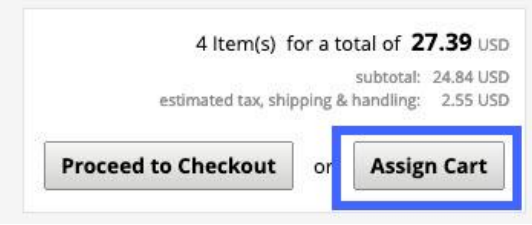
Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Use any of the search fields in the Shop section.</p> <p>Or, click on a supplier catalog in the Showcase section. This action will “punch out”, or redirect the Shopper to the supplier’s website.</p> <p>Once the Shopper enters the supplier’s website, the shopping experience will be similar to other online shopping platforms.</p>	 <p>The screenshot shows the CSUBUY Marketplace interface. At the top, there's a navigation bar with 'Shop' and 'Online Searchable Help' tabs. Below this, there are search bars and a 'Showcases' section. The 'Showcases' section is expanded to show 'GENERAL' and 'FACILITIES MANAGEMENT' categories. Under 'FACILITIES MANAGEMENT', several supplier logos are displayed, including Grainger, Fastenal, and Graybar. A blue arrow points to a 'Select Site PunchOut' button at the bottom of the showcase area.</p>
<p>Step 2: In the supplier’s website, select the items to purchase, and update the quantity. When satisfied with the purchase details, add the item(s) to the shopping cart.</p> <p>NOTE: All items do not necessarily have contracted prices, so Shoppers are encouraged to search for the best pricing amongst all of the catalogs and suppliers.</p>	 <p>The screenshot shows a product page on the Grainger website. The product is 'CONDOR Uncoated Indirect Splash Goggles, Clear Lens' with item number 4VCF6. The price is listed as \$2.42 / each. The availability is 'Expected to arrive Fri. Nov 13 - Mon. Nov 16'. There is a quantity selector set to 3 and an 'Add to Cart' button.</p>

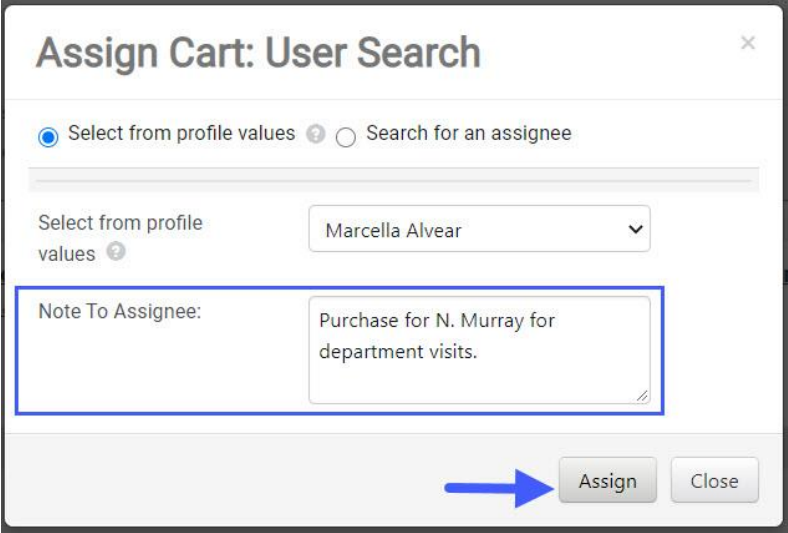
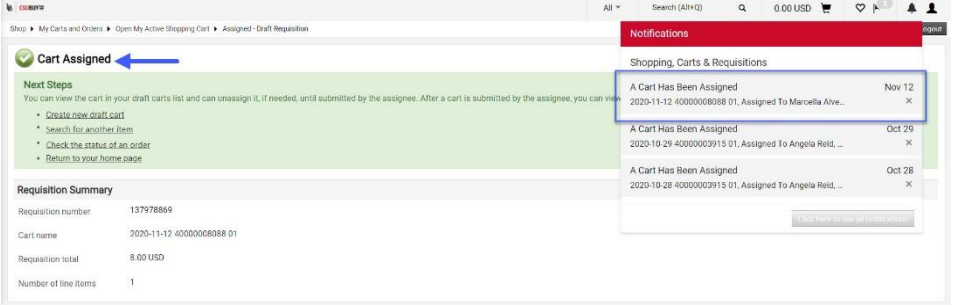
Processing Steps / Field Name	Screenshot / Description
<p>Step 3: Verify all cart information is accurate.</p> <p>Step 4: Although each supplier may use different language, like “checkout” or “submit cart”, follow the supplier’s instructions to submit the cart.</p>	
<p>Step 5: Confirm the shopping cart submission.</p> <p>Submitting or completing the order will transfer the shopping cart to the CSUBUY, and opens the Cart – Draft Requisition page.</p> <p>NOTE: Shoppers may choose to continue searching for items and shop from other Showcase catalogs.</p> <p>When purchasing items from multiple suppliers, all items should be added to a single shopping cart.</p>	

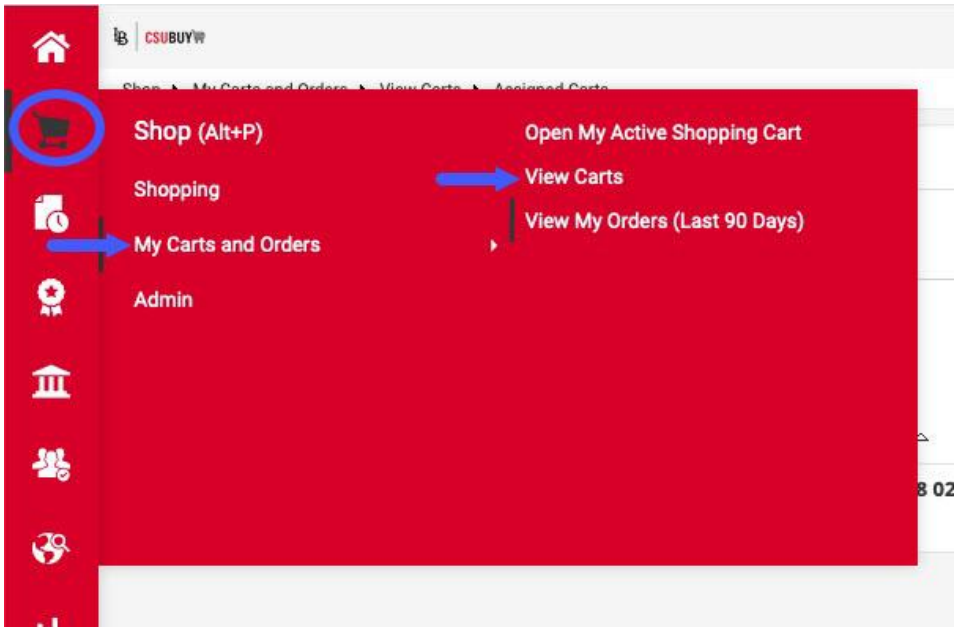
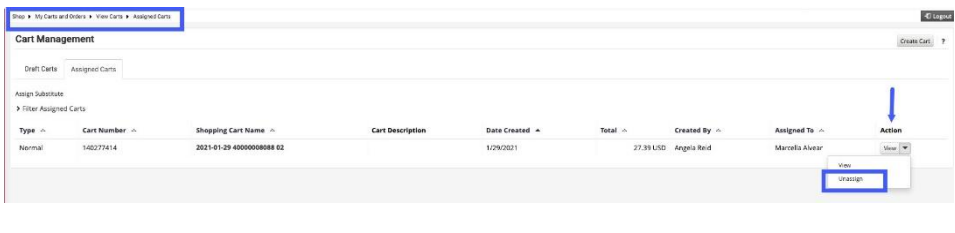
4.2.2 Assigning a Cart

Shoppers will review the shopping cart in their CSUBUY home page before assigning the cart to a preferred Requester.

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Items to view on the Cart – Requisition page:</p> <ol style="list-style-type: none"> Name this cart: Shoppers are encouraged to utilize this option when placing orders. This is a great place to enter a department reference number, or other identifying information. Check with your department coordinator or ASM for directions when using this field. Product Description: Review the supplier and product information to ensure 	

Processing Steps / Field Name	Screenshot / Description
<p>the cart contains the correct items, sizes, quantity, etc.</p> <p>3) Quantity: Shoppers may make changes to the quantity if needed by using this field.</p> <p>4) More Actions: Use the “More Actions” drop-down menu to perform other actions such as storing the cart as a favorite; or removing or moving items to a different favorite cart.</p> <p>5) Continue Shopping: Click “Continue Shopping” to return to the Shopping Home Page to search or choose different catalogs to shop for more items.</p> <p>6) Empty Cart: Click “Empty Cart” to empty all items from the cart and cancel the purchase or start over.</p> <p>7) Update: Click “Update” to refresh the shopping cart to reflect any changes made during the cart review.</p> <p>NOTE: In the event that the cart is not ready to be assigned, Shoppers may return to active shopping carts at a later time or date by clicking the shopping cart icon located on the navigation pane. Select “My Carts and Orders”, “Open My Active Shopping Cart”, then choose the saved cart.</p>	
<p>Step 2: Select “Assign Cart” to open the Assign Cart: User Search popup.</p>	

Processing Steps / Field Name	Screenshot / Description
<p>Step 4: Carts are assigned to the Shopper's preferred Requester. To assign the cart to another Department Requester, click "Search for an assignee" to select from your created list of Department Requesters.</p> <p>Step 5: Use the "Note To Assignee" field to enter information that will assist department Pro Cardholders with the month-end reconciliation process.</p> <p>The minimum information should be:</p> <ol style="list-style-type: none"> 1) who the purchase is for; 2) the department or university business purpose for the purchase; 3) and any other relevant information. <p>Step 6: Click "Assign".</p>	
<p>This action confirms the cart has been assigned and adds the confirmation to the Shopper's list of <u>Shopping, Carts & Requisitions</u> notifications.</p> <p>This action completes the shopping process.</p>	

Processing Steps / Field Name	Screenshot / Description
<p>Step 7: If it is necessary to unassign a cart, click the shopping cart icon on the navigation pane; then select “My Carts and Orders”, “View Carts”, and “Assigned Carts”.</p>	
<p>Step 8: In the Cart Management page, locate the order to unassign.</p> <p>Step 9: Select “Unassign” from the <u>Actions</u> drop-down menu. This action will unassign the cart.</p>	

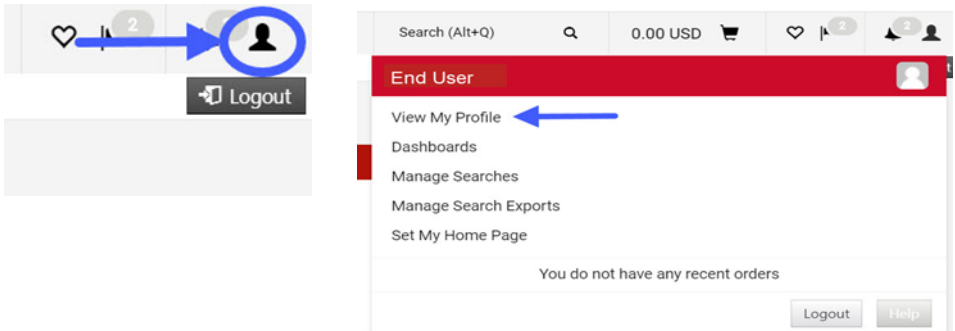
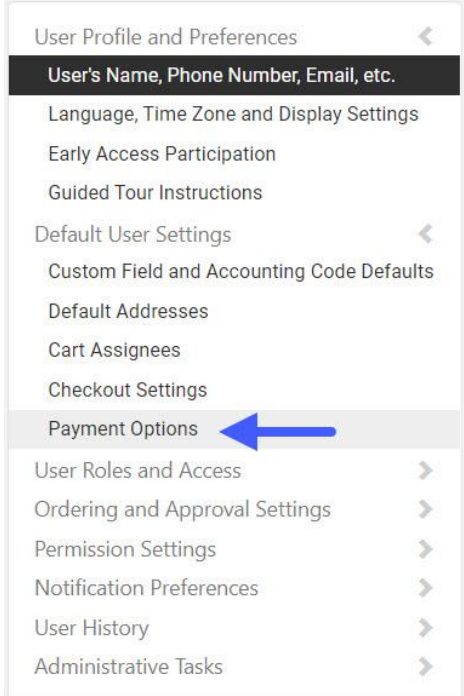

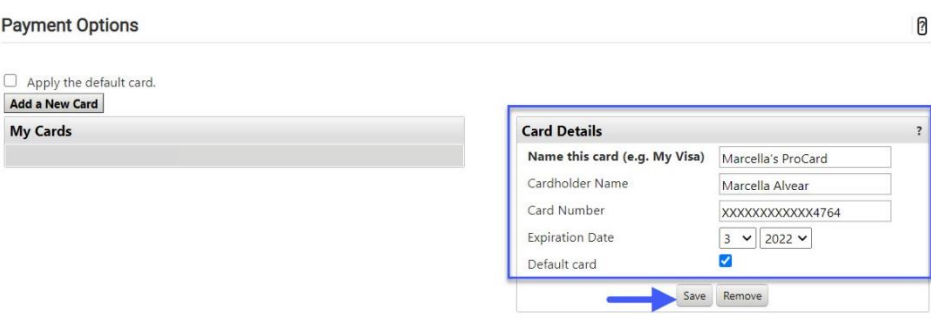
5.0 CSUBUY Requesters

End users with the CSUBUY Requester role are Pro Cardholders authorized to approve and complete orders and pay for their CSULB Department supplies.

Note that all purchases made on the CSUBUY Marketplace must follow the **How to Purchase to Pay** and **Procurement Card Guidelines**.

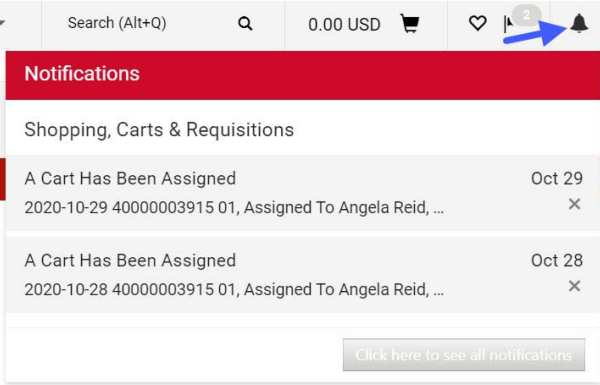
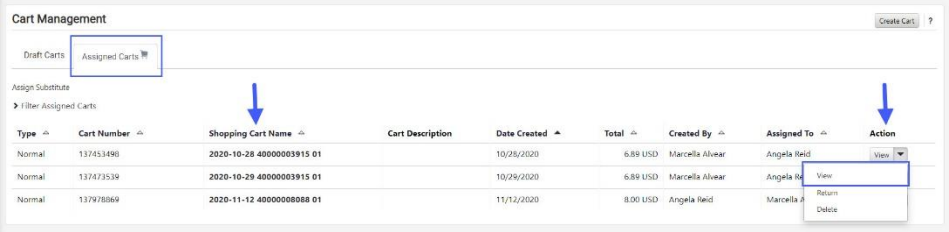
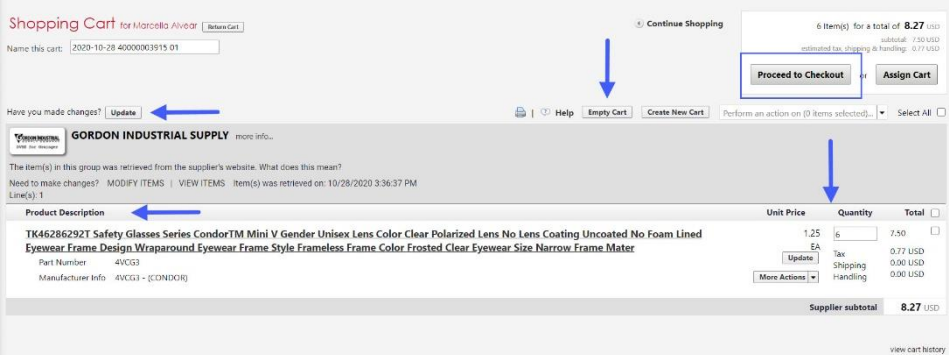
5.1 Add a Pro Card to Your Profile

Requesters, before approving a shopping cart and completing the purchase process, must enter their Pro Card (credit card) into their CSUBUY profile. Requesters are not to use personal cards or accounts for purchases from the CSUBUY Marketplace.

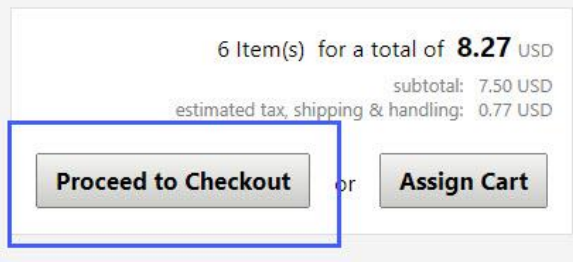
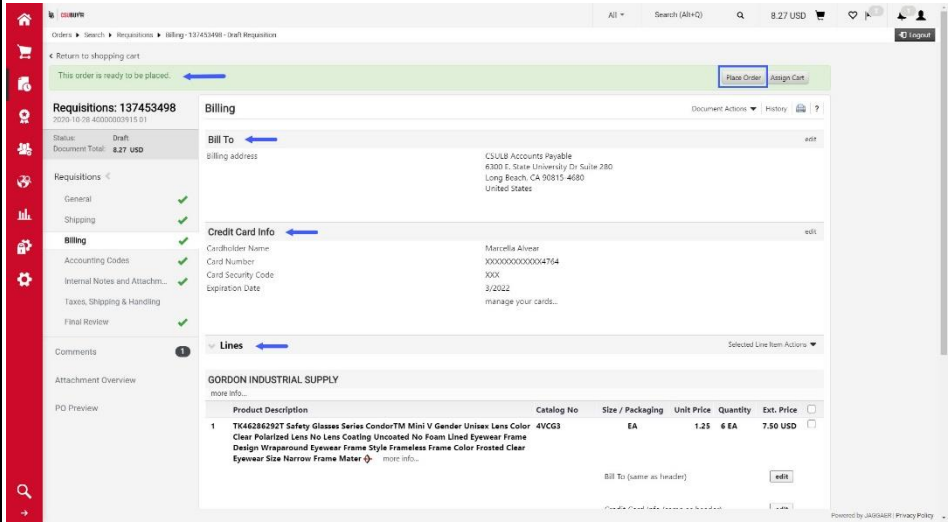
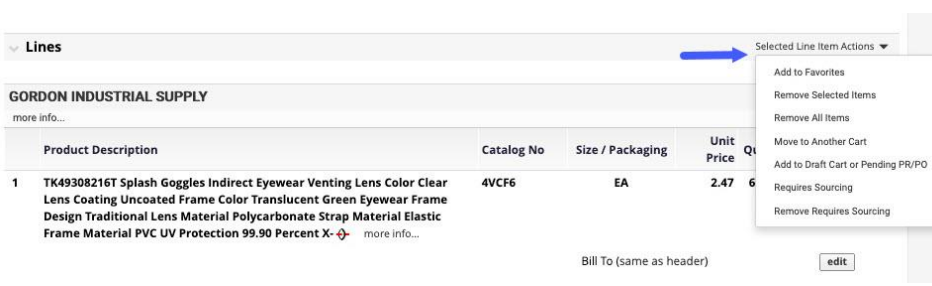
Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page</p> <p>Step 2: Select "View My Profile" from the drop-down menu.</p> <p>This action opens the end user's profile, displaying the user's name, phone number, email, etc.</p>	 <p>The screenshot shows the top navigation bar with a search bar, currency (0.00 USD), and a user profile icon. A dropdown menu is open, showing options like 'View My Profile', 'Dashboards', and 'Manage Searches'. A blue arrow points to the user profile icon, and another blue arrow points to the 'View My Profile' option.</p>
<p>Step 3: Select "Default User Settings", then "Payment Options".</p>	 <p>The screenshot shows a settings menu with various options. 'Payment Options' is highlighted with a blue arrow. Other options include 'User's Name, Phone Number, Email, etc.', 'Language, Time Zone and Display Settings', and 'Default User Settings'.</p>
<p>Step 4: Click "Add a New Card".</p>	 <p>The screenshot shows the 'Payment Options' page. There is a checkbox for 'Apply the default card.' and a button labeled 'Add a New Card' which is highlighted with a blue arrow. Below it is a section titled 'My Cards'.</p>
<p>Step 5: Enter the card details in the following fields: Name this card, Cardholder Name, Card Number and Expiration Date.</p> <p>Step 6: Click the "default card" checkbox.</p> <p>Step 7: Click "Save".</p>	 <p>The screenshot shows the 'Payment Options' page with the 'Card Details' form open. The form contains fields for 'Name this card (e.g. My Visa)', 'Cardholder Name', 'Card Number', and 'Expiration Date'. The 'Default card' checkbox is checked. The 'Save' button is highlighted with a blue arrow.</p>

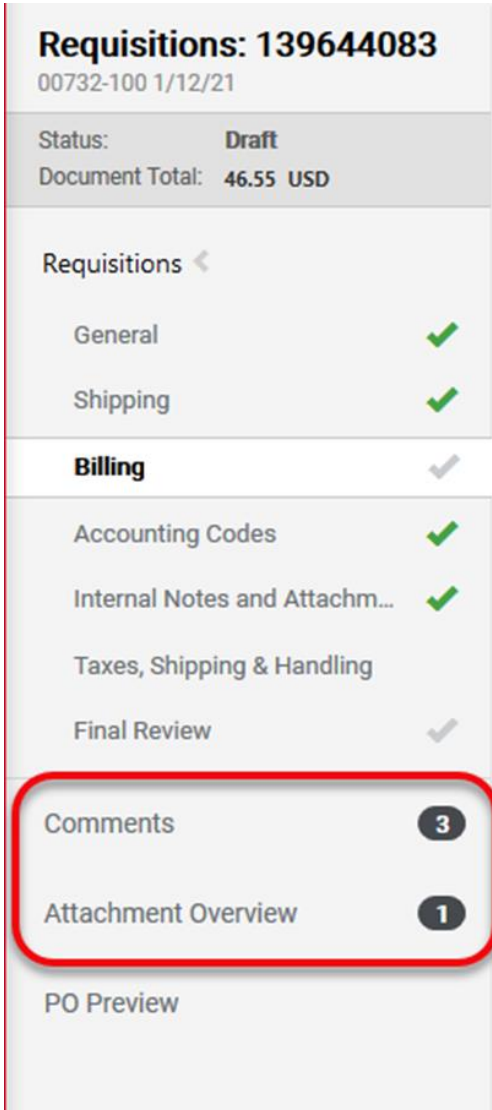
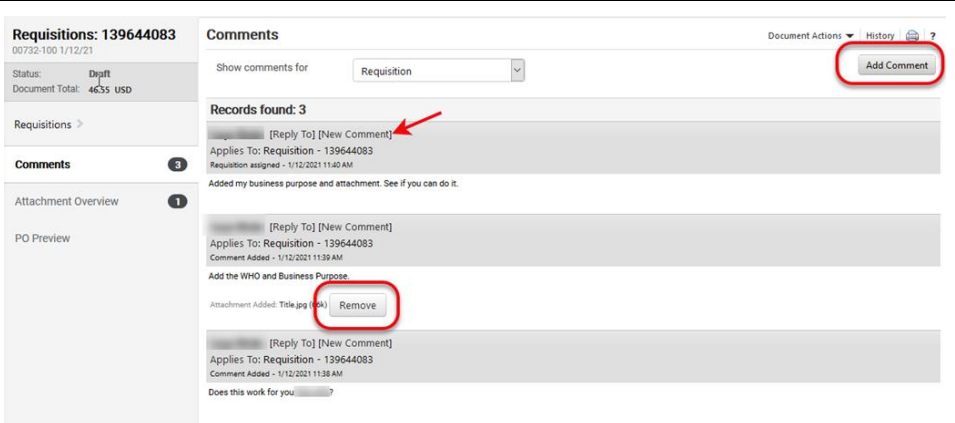
5.2 Accept a Shopping Cart

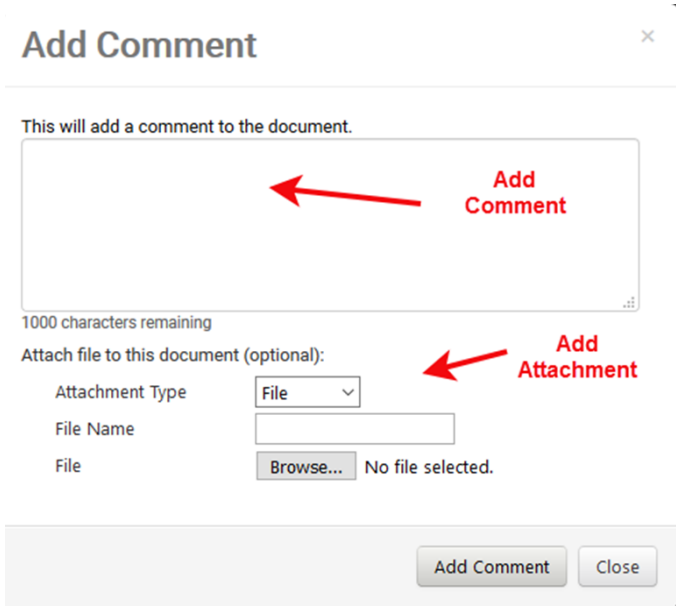
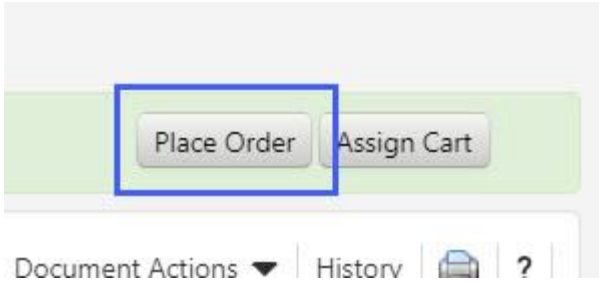
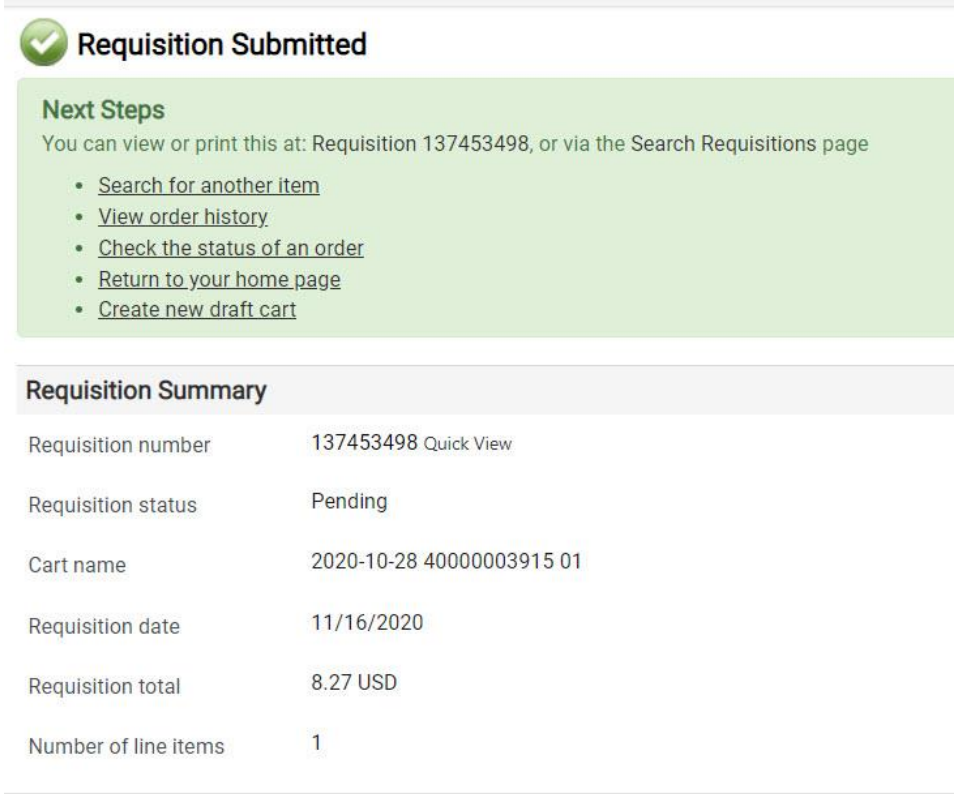
Once Requesters have set their notification preferences and entered their credit card details, they are now prepared to accept a shopping cart and pay for department supplies.

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Open the shopping carts by clicking the notifications icon, then open one cart at a time, or select “Click here to see all notifications” to open a list of all assigned carts.</p> <p>This action opens the Cart Management page.</p>	
<p>Step 2: In the Cart Management page and <u>Assigned Carts</u> tab, select the purchase from the Shopping Cart Name list, or select “View” from the Action drop-down menu. Each option opens the Shopping Cart.</p> <p>Requesters are encouraged to review the cart details, particularly the product description, quantity, price, and any other relevant information before completing the purchase.</p>	
<p>Requesters may update purchase information or empty a shopping cart.</p> <p>Step 3: If making changes, click “Update”.</p>	

5.3 Checkout and Pay

Processing Steps / Field Name	Screenshot / Description
<p>Step 1: Click “Proceed to Checkout.”</p> <p>This action opens the Billing page.</p>	
<p>The Billing page shows the order is ready to be placed.</p> <p>The Billing page shows the default CSULB Accounts Payable bill to address, credit card information, and line items, such as the product description and purchase details.</p>	
<p>Requesters may also select line item actions from the drop-down menu.</p>	


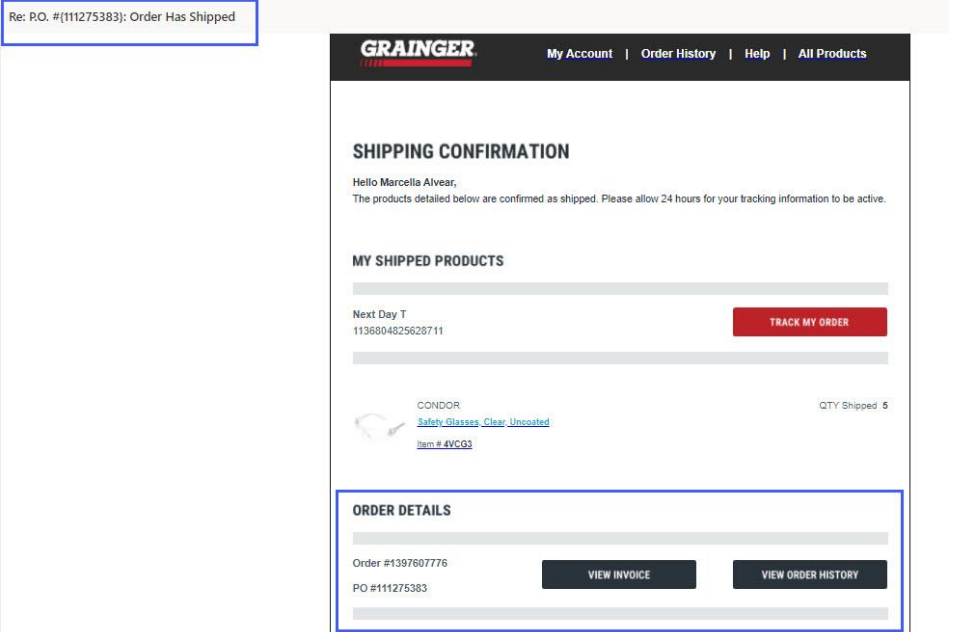
Processing Steps / Field Name	Screenshot / Description
<p>Shoppers may add notes regarding the purchase, and attach required forms (i.e., Hospitality and approval of ATI/ITC) in the Billing page.</p> <p>Step 2: Using the Requisitions navigation menu in the Billing page (which is not equivalent to a PeopleSoft Requisition) select "Comments" to see comments entered by the Shopper.</p> <p>Step 3: Select "Attachment Overview" to see attached files.</p>	 <p>Requisitions: 139644083 00732-100 1/12/21</p> <p>Status: Draft Document Total: 46.55 USD</p> <p>Requisitions <</p> <ul style="list-style-type: none"> General ✓ Shipping ✓ Billing ✓ Accounting Codes ✓ Internal Notes and Attachm... ✓ Taxes, Shipping & Handling Final Review ✓ Comments 3 Attachment Overview 1 PO Preview
<p>The Comments section is for the Requester to include their own addition notes should the comments need to be referenced during month-end reconciliation.</p> <p>Step 4: Click "Add Comments" to add a new comment or attach forms and/or documents.</p>	 <p>Requisitions: 139644083 00732-100 1/12/21</p> <p>Status: Draft Document Total: 46.55 USD</p> <p>Requisitions ></p> <p>Comments 3</p> <p>Attachment Overview 1</p> <p>PO Preview</p> <p>Comments</p> <p>Show comments for: Requisition</p> <p>Document Actions History ?</p> <p>Records found: 3</p> <p>[Reply To] [New Comment]</p> <p>Applies To: Requisition - 139644083 Comment Added - 1/12/2021 11:39 AM</p> <p>Added my business purpose and attachment. See if you can do it.</p> <p>Attachment Added: Title.jpg (99K) Remove</p> <p>Applies To: Requisition - 139644083 Comment Added - 1/12/2021 11:38 AM</p> <p>Does this work for you: ?</p> <p>Add Comment</p>

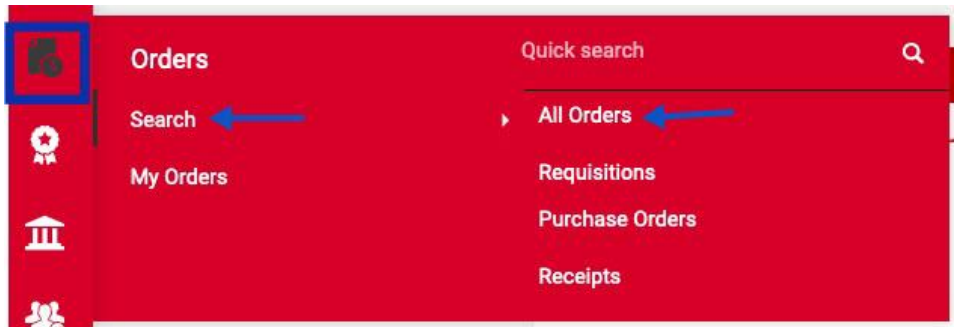
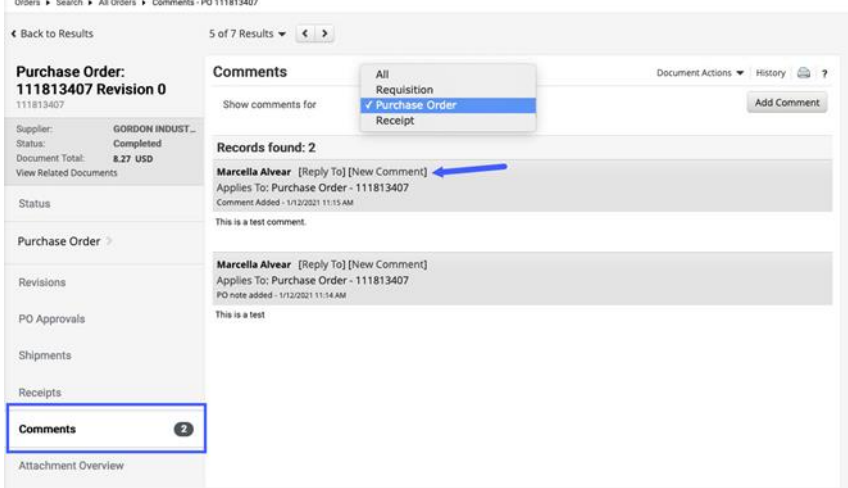
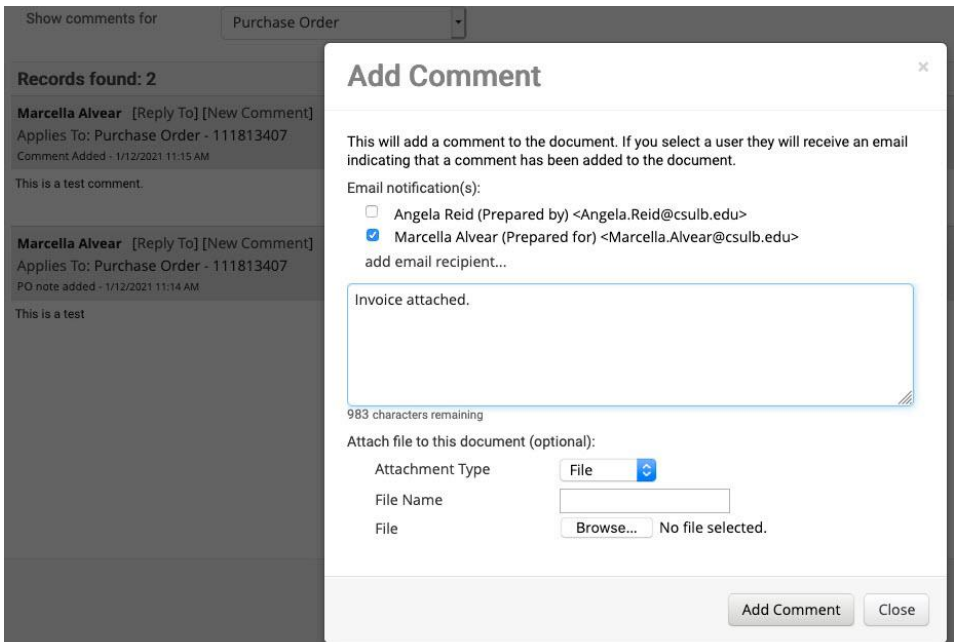
Processing Steps / Field Name	Screenshot / Description														
<p>Step 5: Use the Add Comment window to add a new comment or to attach a file.</p> <p>This is where Shoppers will upload any required forms and/or documents. Requesters can use this tool to collect required documents, such as invoices.</p> <p>NOTE: Users would click "Remove" to delete attached documents or to delete comments if necessary.</p>															
<p>Step 6: In the Billing page, click "Place Order" to finalize the purchase.</p>															
<p>This action completes the purchase process, and creates a requisition number and requisition summary.</p>	 <table border="1"> <thead> <tr> <th colspan="2">Requisition Summary</th> </tr> </thead> <tbody> <tr> <td>Requisition number</td> <td>137453498 Quick View</td> </tr> <tr> <td>Requisition status</td> <td>Pending</td> </tr> <tr> <td>Cart name</td> <td>2020-10-28 40000003915 01</td> </tr> <tr> <td>Requisition date</td> <td>11/16/2020</td> </tr> <tr> <td>Requisition total</td> <td>8.27 USD</td> </tr> <tr> <td>Number of line items</td> <td>1</td> </tr> </tbody> </table>	Requisition Summary		Requisition number	137453498 Quick View	Requisition status	Pending	Cart name	2020-10-28 40000003915 01	Requisition date	11/16/2020	Requisition total	8.27 USD	Number of line items	1
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Number of line items	1														

6.0 Transaction Notifications


If Shoppers and Requesters have chosen email as a preference for receiving notifications, they will receive emails regarding purchase transactions.

6.1 Shopper Notifications

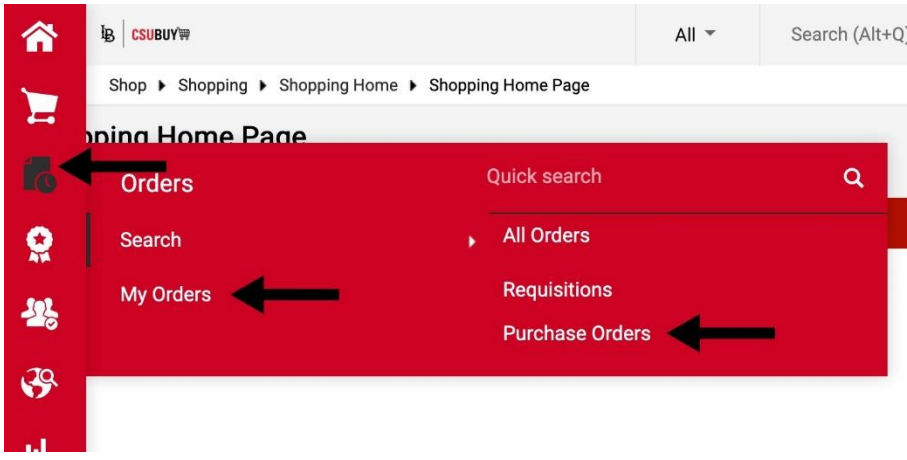
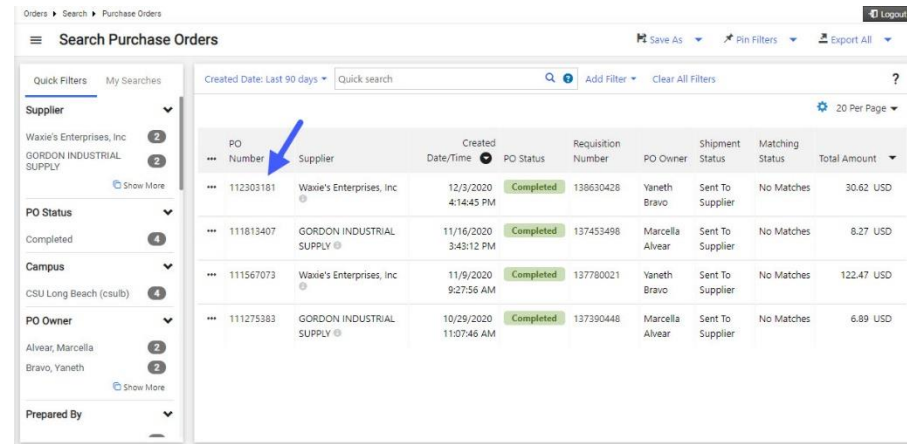
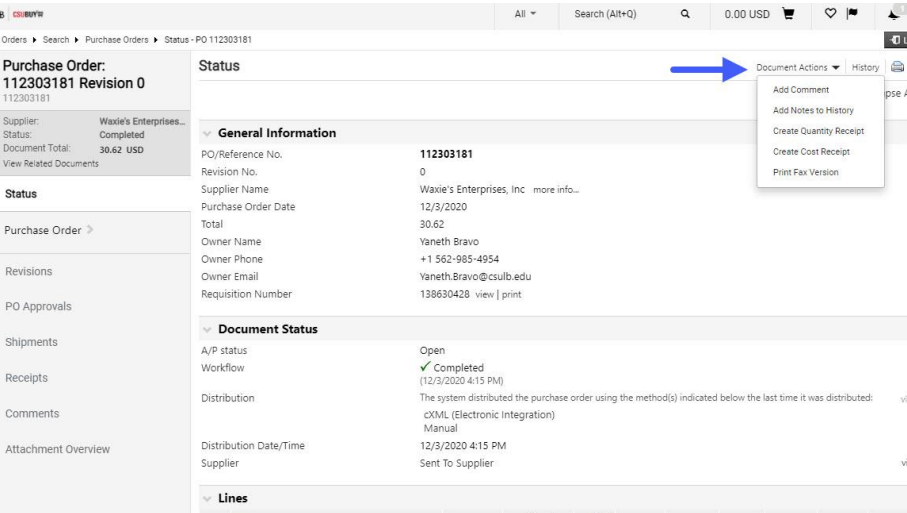
Processing Steps/Field Name	Screenshot / Description
<p>Shoppers will receive an email notification that includes the assigned cart and assignee information.</p> <p>The note to the assignee is included in the email notification.</p>	<p>Re: A shopping cart has been assigned to you Cart Name: 2020-10-28 40000003915 01 Cart Number: 137453498 Prepared for: Marcella Alvear (Campus: CSU Long Beach) Prepared by: Angela Reid</p> <p>Dear Marcella Alvear</p> <p>A Cart has been assigned to Angela Reid (Angela.Reid@csulb.edu) from Marcella Alvear (marcella.alvear@csulb.edu). The shopping cart can be accessed for review in "Draft Carts" or by selecting the URL below.</p> <p>https://solutions.sciquest.com/apps/Router/ViewAssignedCarts?AuthUser=7317832&ParamAction=View&CartId=137453498&tmstmp=1603924654854</p> <p>If applicable, the user has submitted the following additional comments:</p> <p>Order for the Purchasing Department, thank you. Marcella </p> <p>If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team.</p> <p>Support Team Contact Information:</p> <p>Thank you, CalState</p>
<p>Shoppers will receive the invoice by email from the supplier when the items are shipped.</p>	<p>Re: P.O. #111275383: Order Has Shipped</p> 

Processing Steps/Field Name	Screenshot / Description
<p>Shoppers will attach invoices to the Order Comments window.</p> <p>Step 1: In the left navigation pane, select the Orders icon; select “Search”, “All Orders”, and then “Comments”.</p>	
<p>Step 2: Use the comments drop-down menu to narrow the search for specific comments.</p> <p>Step 3: Select the purchase order record and click “New Comment”.</p>	
<p>Step 4: Choose the appropriate email recipient, or add an email recipient.</p> <p>Step 5: Type a comment in the text field.</p> <p>Step 6: Attach the file.</p> <p>Step 7: Click “Add Comment”.</p>	

6.2 Requester Notifications

Processing Steps/Field Name	Screenshot / Description
<p>Requesters will receive an email confirming a shopping cart has been assigned to them.</p> <p>The note typed in the Assign Cart: User Search window appears in the email.</p>	<p>Re: A shopping cart has been assigned to you Cart Name: 2020-11-12 40000008088 01 Cart Number: 137978869 Prepared for: Angela Reid (Campus: CSU Long Beach) Prepared by: Marcella Alvear</p> <p>Dear Marcella Alvear</p> <p>A shopping cart has been assigned to you by Angela Reid (Angela.Reid@csulb.edu). The shopping cart can be accessed for review in "Draft Carts" or by selecting the URL below.</p> <p>https://solutions.sciquest.com/apps/Router/ViewAssignedCarts?AuthUser=7317832&ParamAction=View&CartId=137978869&tmstmp=1605222812063</p> <p>If applicable, the user has submitted the following additional comments:</p> <p>Purchase for N. Murray for department visits. </p> <p>If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team.</p> <p>Support Team Contact Information:</p> <p>Thank you, CalState</p>
<p>Requesters will receive a notification of the submitted requisition after placing an order.</p>	<p>Re: REQUISITION SUBMITTED FOR APPROVAL #: 137453498 Cart Name: 2020-10-28 40000003915 01 Prepared for: Marcella Alvear Prepared by: Angela Reid</p> <p>Dear Marcella Alvear,</p> <p>Your requisition has been submitted to your organization's workflow process for review. Please use "My Requisitions" to track the status of your requisition through the workflow process. You can access this requisition directly by selecting the URL below.</p> <p>View Requisition</p> <p>If you have any questions with regard to your requisition, please contact your SelectSite Support Team.</p> <p>Support Team Contact Information:</p> <p>Thank you, CalState</p>

7.0 Accessing Past Orders

Processing Steps / Field Name	Screenshot / Description																																													
<p>Step 1: Click the Orders icon on the left navigation pane.</p> <p>Step 2: Select "My Orders", then "Purchase Orders".</p> <p>This action displays a list of completed purchase orders placed in CSUBUY.</p>	 <p>The screenshot shows the CSUBUY navigation menu. The 'Orders' icon is highlighted with a black arrow. A dropdown menu is open, showing 'All Orders', 'Requisitions', and 'Purchase Orders', with black arrows pointing to each of these options.</p>																																													
<p>Step 3: Select a specific PO number hyperlink to access general information such as the document status and the product description.</p>	 <p>The screenshot shows the 'Search Purchase Orders' page. A table lists several purchase orders. A blue arrow points to the PO Number '112303181' in the first row.</p> <table border="1"> <thead> <tr> <th>PO Number</th> <th>Supplier</th> <th>Created Date/Time</th> <th>PO Status</th> <th>Requisition Number</th> <th>PO Owner</th> <th>Shipment Status</th> <th>Matching Status</th> <th>Total Amount</th> </tr> </thead> <tbody> <tr> <td>112303181</td> <td>Waxie's Enterprises, Inc</td> <td>12/3/2020 4:14:45 PM</td> <td>Completed</td> <td>138630428</td> <td>Yaneth Bravo</td> <td>Sent To Supplier</td> <td>No Matches</td> <td>30.62 USD</td> </tr> <tr> <td>111813407</td> <td>GORDON INDUSTRIAL SUPPLY</td> <td>11/16/2020 3:43:12 PM</td> <td>Completed</td> <td>137453498</td> <td>Marcella Alvear</td> <td>Sent To Supplier</td> <td>No Matches</td> <td>8.27 USD</td> </tr> <tr> <td>111567073</td> <td>Waxie's Enterprises, Inc</td> <td>11/9/2020 9:27:56 AM</td> <td>Completed</td> <td>137780021</td> <td>Yaneth Bravo</td> <td>Sent To Supplier</td> <td>No Matches</td> <td>122.47 USD</td> </tr> <tr> <td>111275383</td> <td>GORDON INDUSTRIAL SUPPLY</td> <td>10/29/2020 11:07:46 AM</td> <td>Completed</td> <td>137390448</td> <td>Marcella Alvear</td> <td>Sent To Supplier</td> <td>No Matches</td> <td>6.89 USD</td> </tr> </tbody> </table>	PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount	112303181	Waxie's Enterprises, Inc	12/3/2020 4:14:45 PM	Completed	138630428	Yaneth Bravo	Sent To Supplier	No Matches	30.62 USD	111813407	GORDON INDUSTRIAL SUPPLY	11/16/2020 3:43:12 PM	Completed	137453498	Marcella Alvear	Sent To Supplier	No Matches	8.27 USD	111567073	Waxie's Enterprises, Inc	11/9/2020 9:27:56 AM	Completed	137780021	Yaneth Bravo	Sent To Supplier	No Matches	122.47 USD	111275383	GORDON INDUSTRIAL SUPPLY	10/29/2020 11:07:46 AM	Completed	137390448	Marcella Alvear	Sent To Supplier	No Matches	6.89 USD
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111813407	GORDON INDUSTRIAL SUPPLY	11/16/2020 3:43:12 PM	Completed	137453498	Marcella Alvear	Sent To Supplier	No Matches	8.27 USD																																						
111567073	Waxie's Enterprises, Inc	11/9/2020 9:27:56 AM	Completed	137780021	Yaneth Bravo	Sent To Supplier	No Matches	122.47 USD																																						
111275383	GORDON INDUSTRIAL SUPPLY	10/29/2020 11:07:46 AM	Completed	137390448	Marcella Alvear	Sent To Supplier	No Matches	6.89 USD																																						
<p>Step 4: Click "Document Actions" for optional actions, such as adding comments, adding notes to the transaction history, or creating quantity receipts.</p>	 <p>The screenshot shows the details for Purchase Order 112303181. A blue arrow points to the 'Document Actions' dropdown menu in the top right corner. The dropdown menu is open, showing options: 'Add Comment', 'Add Notes to History', 'Create Quantity Receipt', 'Create Cost Receipt', and 'Print Fax Version'.</p>																																													