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
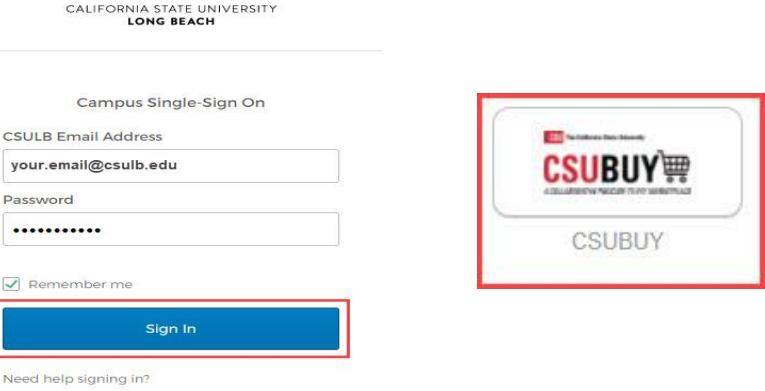- CSUBUY – How to Submit and Pay

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

1.2 CSUBUY Shopping Home Page
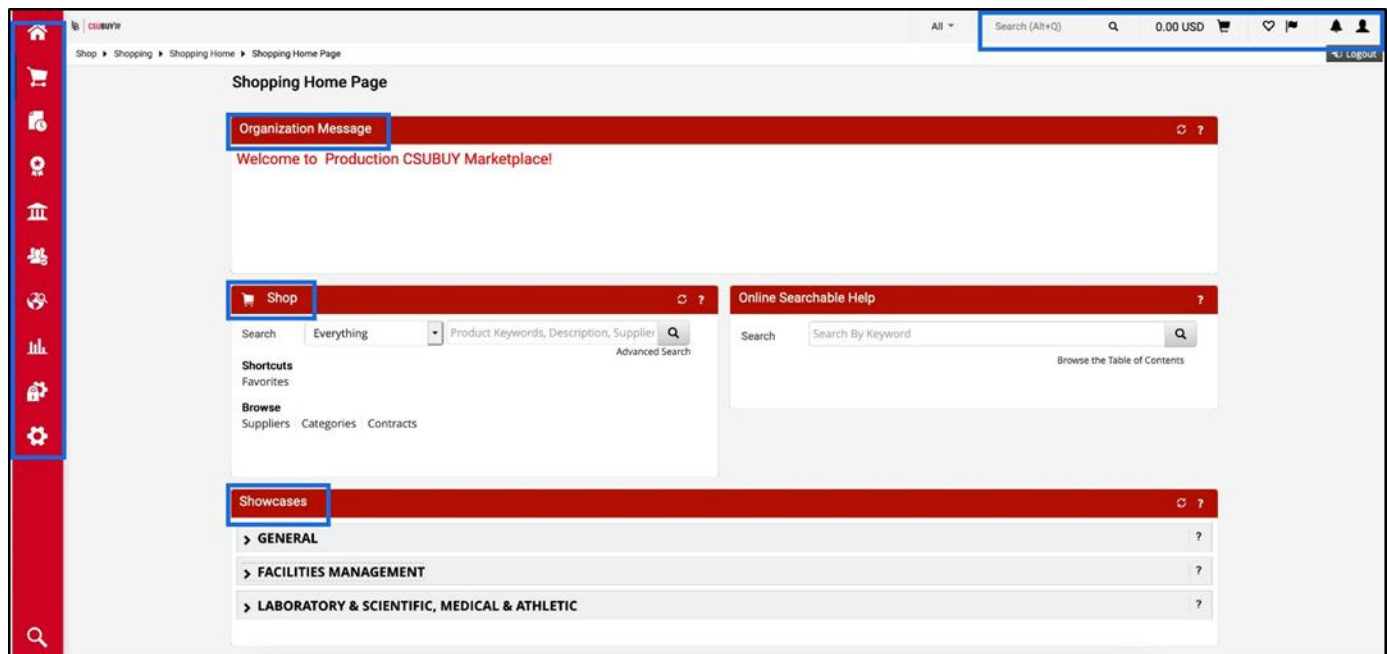
1.2.1 Shopping Home Page Ribbon

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.
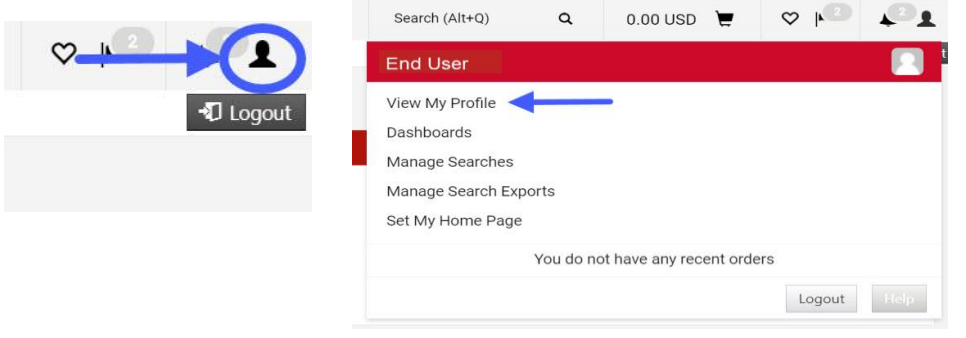
1.2.5 Showcases

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).
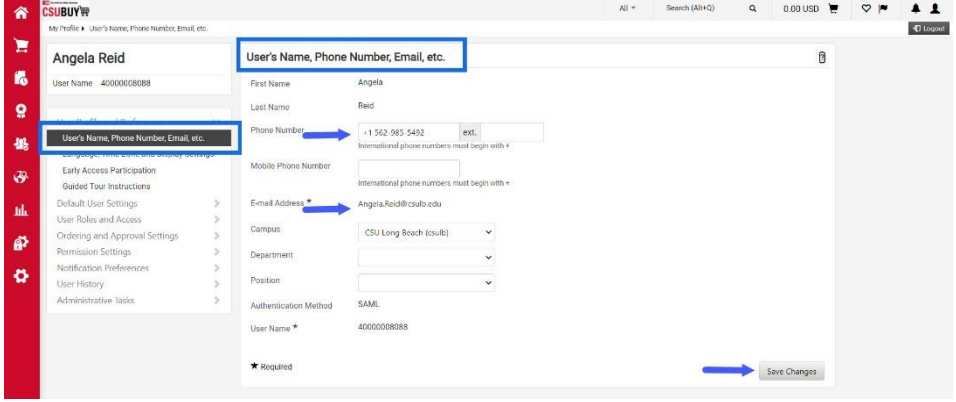
2.0   Set Up a User Profile

All end users must set up their user profile before shopping and placing orders as Shoppers and Requesters.
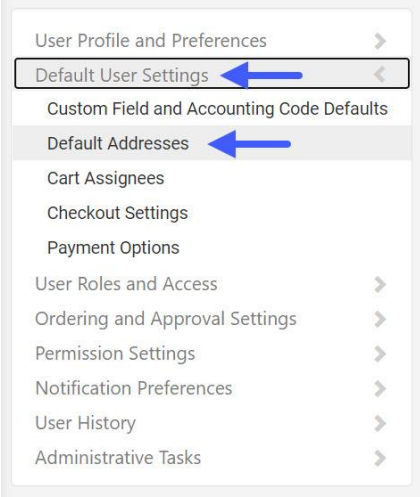
2.1   Access the User Profile Icon

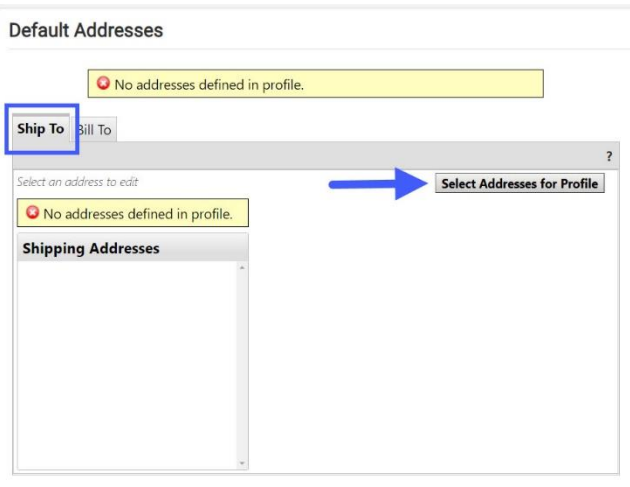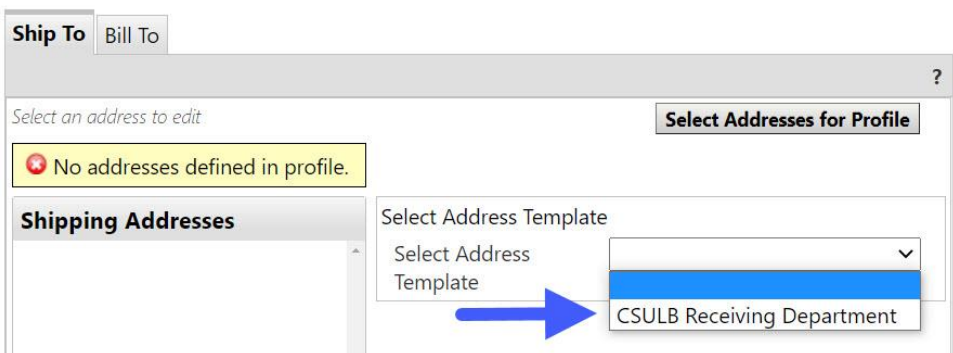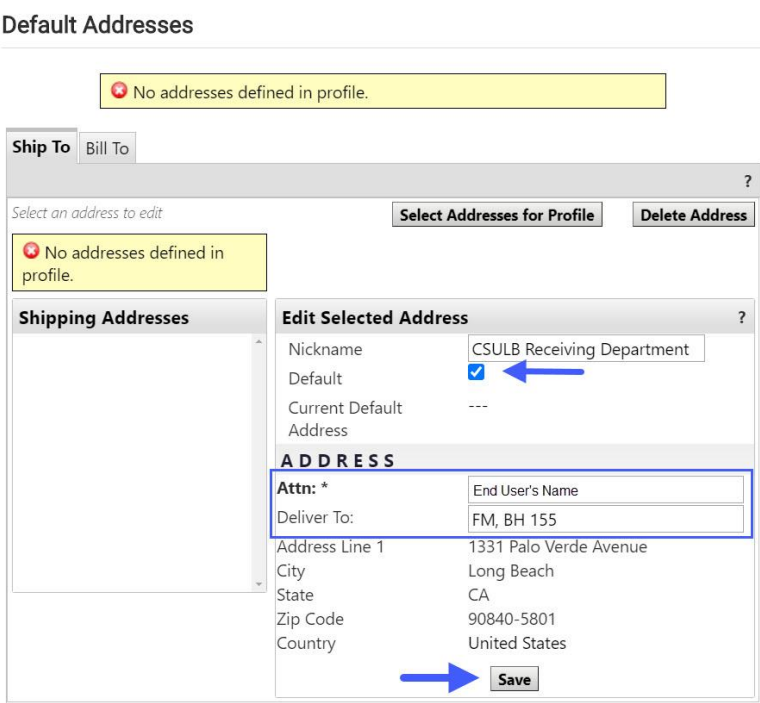| Processing Steps / Field Name	Screenshot / Description
Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page **Step 2:** Select "View My Profile" from the drop-down menu. This action opens the end user's profile, displaying the user's name, phone number, email,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

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

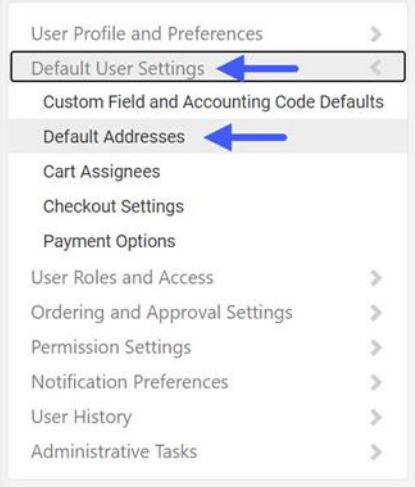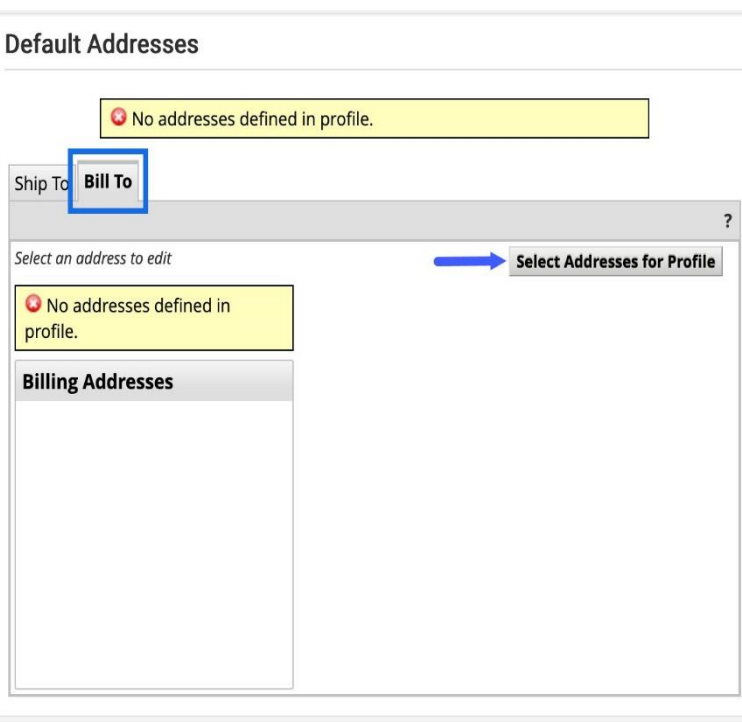| Processing Steps / Field Name	Screenshot / Description
Step 1: Type the phone number. Include the extension, if applicable. Note: the email address is required and defaults to the CSULB email address. The Department and Position fields are not editable fields. **Step 2:** Click on "Save Changes".	

2.3   **Default <u>Ship To</u> 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
Step 1: In the User Profile, select "Default User Settings", then "Default Addresses" from the drop-down menu.	

Processing Steps / Field Name	Screenshot / Description
Step 2: On the <u>Ship To</u> tab, click on "Select Addresses for Profile".	**Default Addresses** 🚫 No addresses defined in profile. **Ship To**	Bill To ? *Select an address to edit* → **Select Addresses for Profile** 🚫 No addresses defined in profile. **Shipping Addresses**
Step 3: Click on "CSULB Receiving Department" from the <u>Select Address Template</u> drop-down menu.	**Ship To**	Bill To ? *Select an address to edit* **Select Addresses for Profile** 🚫 No addresses defined in profile. **Shipping Addresses** Select Address Template Select Address Template [⌄] → CSULB Receiving Department
Step 4: Check the "Default" box. The user's name will appear in the "Attn." field. **Step 5:** In the "Deliver To" field, type the Department Name, followed by a comma; then the Department or Building Number. **Step 6:** Click on "Save". This action saves <u>CSULB Receiving Department</u> as the end user's default shipping address, and notes the department for purchased deliveries. **NOTE**: To change the <u>Ship To – Deliver To</u> address, click "Delete Address", then enter a different address in the "Deliver To" field.	**Default Addresses** 🚫 No addresses defined in profile. **Ship To**	Bill To ? *Select an address to edit* **Select Addresses for Profile** **Delete Address** 🚫 No addresses defined in profile. **Shipping Addresses** **Edit Selected Address** ? Nickname CSULB Receiving Department Default ☑ Current Default --- Address **A D D R E S S** **Attn: *** End User's Name Deliver To: FM, BH 155 Address Line 1 1331 Palo Verde Avenue City Long Beach State CA Zip Code 90840-5801 Country United States → **Save**

2.4 **Default Bill To Address**

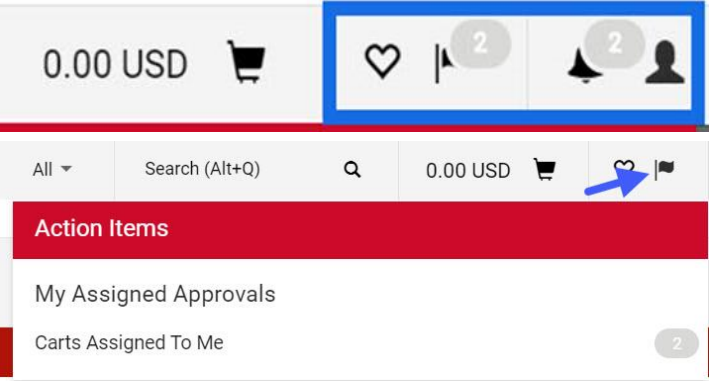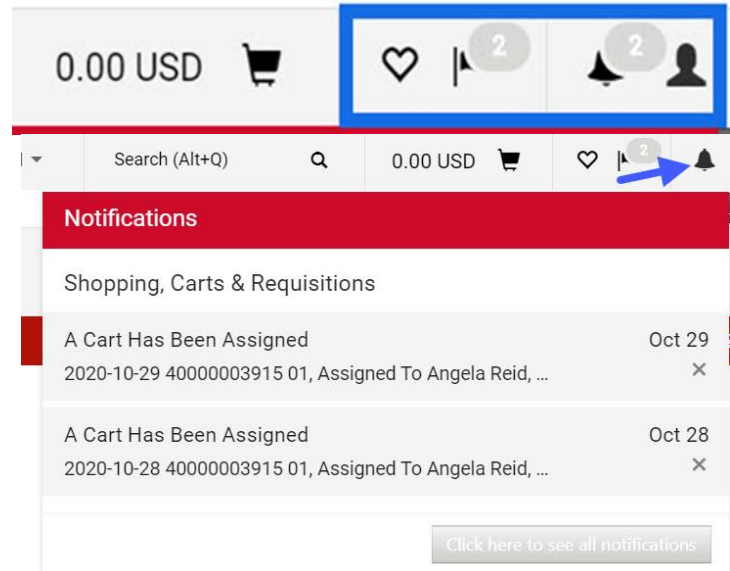End users must set Accounts Payable as the default billing address for payment for purchased items.

Processing Steps / Field Name	Screenshot / Description
Step 1: In the User Profile, select "Default User Settings", then "Default Addresses" from the drop-down menu.	User Profile and Preferences > Default User Settings < Custom Field and Accounting Code Defaults Default Addresses Cart Assignees Checkout Settings Payment Options User Roles and Access > Ordering and Approval Settings > Permission Settings > Notification Preferences > User History > Administrative Tasks >
Step 2: On the Bill To tab, click "Select Addresses for Profile".	**Default Addresses** ⊗ No addresses defined in profile. Ship To | **Bill To** ? *Select an address to edit* **Select Addresses for Profile** ⊗ No addresses defined in profile. **Billing Addresses**
Step 3: From the Select Address Template drop-down menu, click "CSULB Accounts Payable", which is the CSULB default billing address.	Ship To | **Bill To** ? *Select an address to edit* **Select Addresses for Profile** ⊗ No addresses defined in profile. **Billing Addresses** Select Address Template Select Address Template ⌄ CSULB Accounts Payable

Processing Steps / Field Name	Screenshot / Description
Step 4: Check the "Default" box. **Step 5:** Click "Save". This action saves the default shipping address.	

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
Action Items: A number next to the flag icon indicates the number of shopping carts processed by a Shopper, assigned to the Requester and waiting for the Requester to complete the purchase process.	
Notifications: A number next to the bell icon indicates that there is a list of notifications related to the users' notification preferences (i.e., Shopping Carts & Requisitions). **NOTE**: In this example, a Shopper will see a list of the carts assigned to the Requester for their approval. 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.	
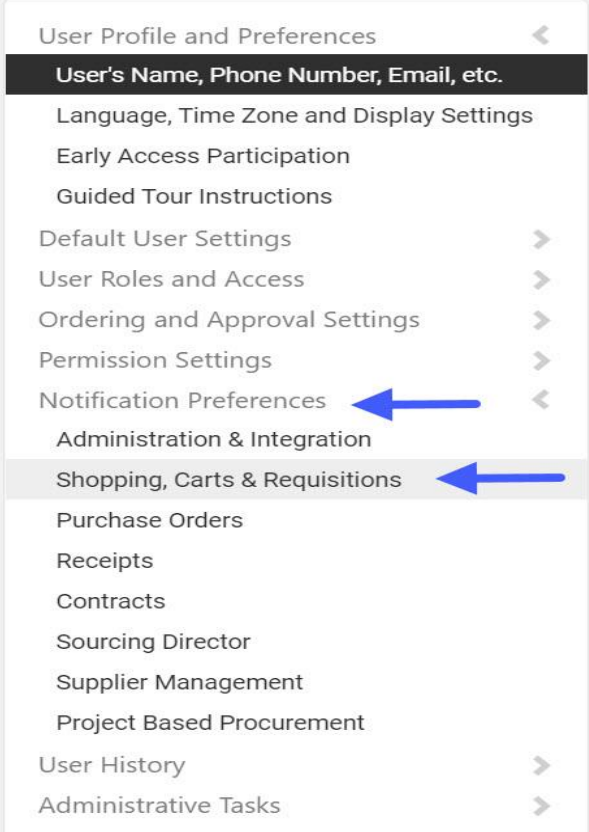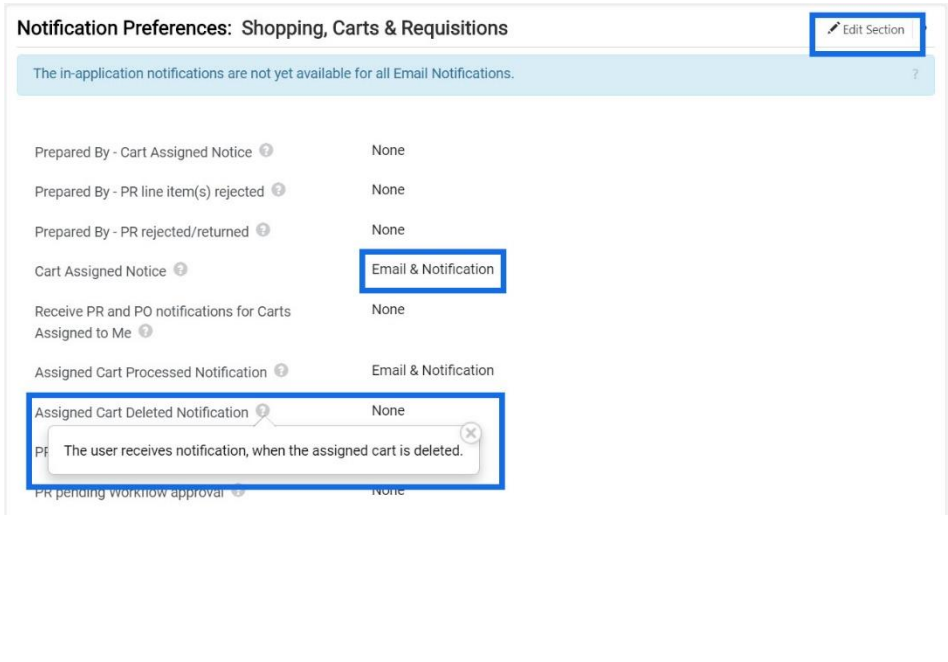
3.1   Notification Preferences
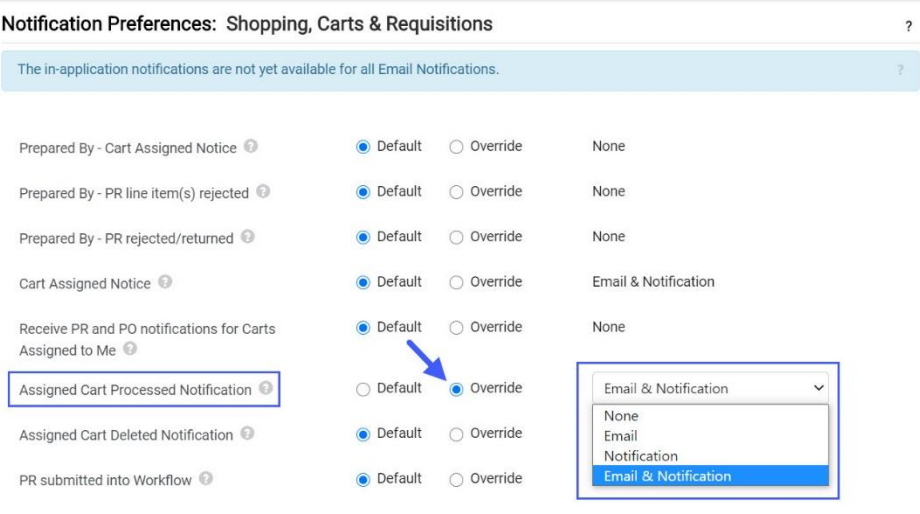
When end users receive access to CSUBUY, their profile will set default notifications based on their role. Shoppers and Requesters notification preferences will differ due to the notification category (i.e., Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, or Receipts).

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
Step 1: In the User Profile, select "Notification Preferences", then "Shopping, Carts & Requisitions" from the user profile drop-down menu.	User Profile and Preferences **User's Name, Phone Number, Email, etc.** Language, Time Zone and Display Settings Early Access Participation Guided Tour Instructions Default User Settings > User Roles and Access > Ordering and Approval Settings > Permission Settings > Notification Preferences < Administration & Integration Shopping, Carts & Requisitions Purchase Orders Receipts Contracts Sourcing Director Supplier Management Project Based Procurement User History > Administrative Tasks >
The Notification Preferences page contents include the following: **None:** notification that indicates there is no notification preference for a specific action. **Email & Notification:** notification that indicates users will receive email and push notifications when logging into the CSUBUY Marketplace. **Information:** icon provides a description of the notification. **To make changes:** **Step 2:** Click the "Edit Section" link to make changes to notification preferences.	**Notification Preferences: Shopping, Carts & Requisitions** ✎ Edit Section The in-application notifications are not yet available for all Email Notifications. Prepared By - Cart Assigned Notice ⓘ None Prepared By - PR line item(s) rejected ⓘ None Prepared By - PR rejected/returned ⓘ None Cart Assigned Notice ⓘ Email & Notification Receive PR and PO notifications for Carts Assigned to Me ⓘ None Assigned Cart Processed Notification ⓘ Email & Notification Assigned Cart Deleted Notification ⓘ None The user receives notification, when the assigned cart is deleted. PR pending workflow approval ⓘ None

Processing Steps / Field Name	Screenshot / Description
Step 3: Choose the notification to change and select the "Override" option. **Step 4:** Select the notification method from the drop-down menu. **Step 5:** Click "Save Changes" at the bottom of the page.	Notification Preferences: Shopping, Carts & Requisitions ? The in-application notifications are not yet available for all Email Notifications. ? Prepared By - Cart Assigned Notice ●Default ○Override None Prepared By - PR line item(s) rejected ●Default ○Override None Prepared By - PR rejected/returned ●Default ○Override None Cart Assigned Notice ●Default ○Override Email & Notification Receive PR and PO notifications for Carts Assigned to Me ●Default ○Override None Assigned Cart Processed Notification ○Default ●Override Email & Notification None / Email / Notification / Email & Notification Assigned Cart Deleted Notification ●Default ○Override PR submitted into Workflow ●Default ○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:
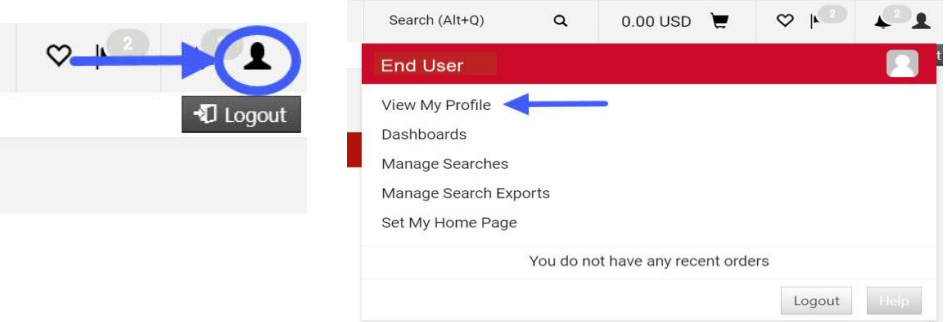
1. how to select cart assignees who are authorized Pro Cardholders (aka Requesters) who will pay for purchases;
2. how to shop for items;
3. creating a shopping cart;
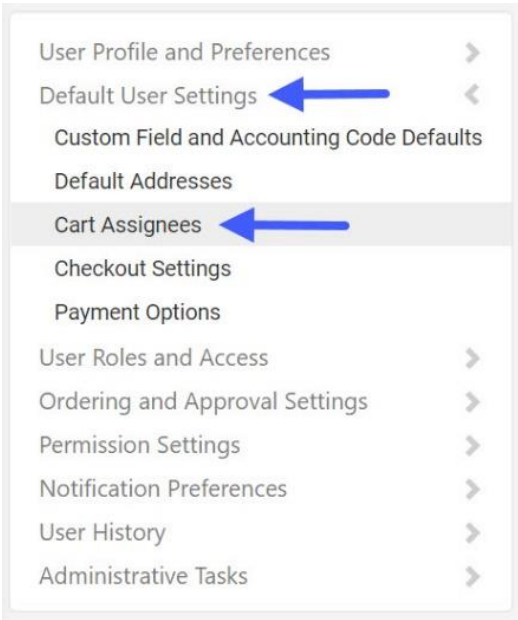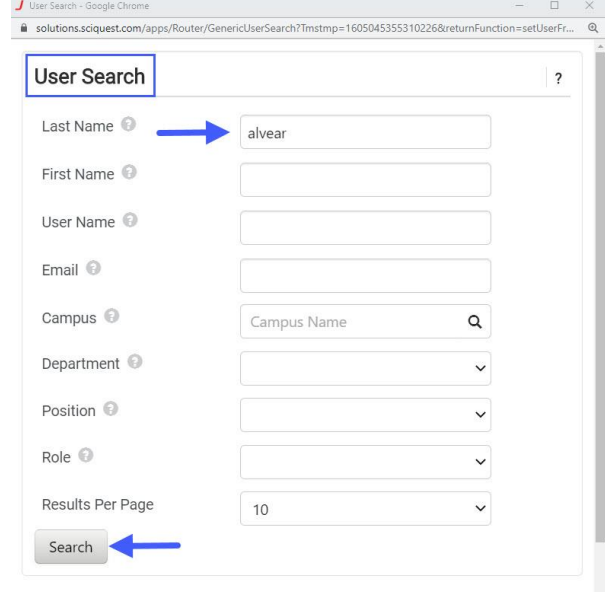4. and, assigning the shopping cart to a Requester.

Note that all purchases made on the CSUBUY Marketplace <u>must</u> follow the **How to Purchase to Pay** and **Procurement Card Guidelines**.
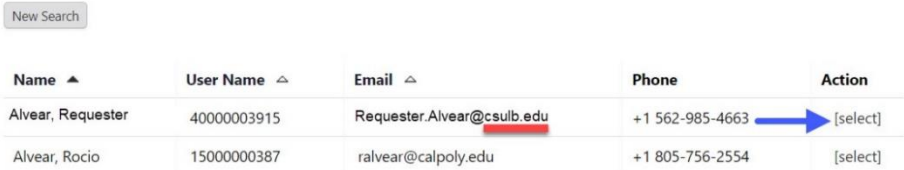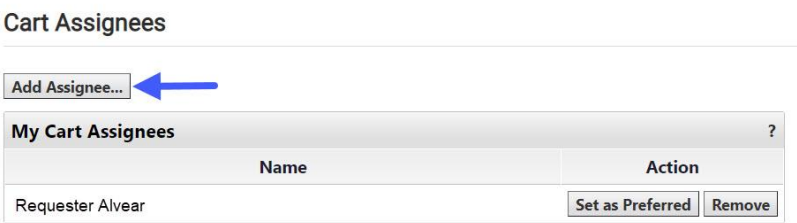
4.1   Cart Assignees

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.

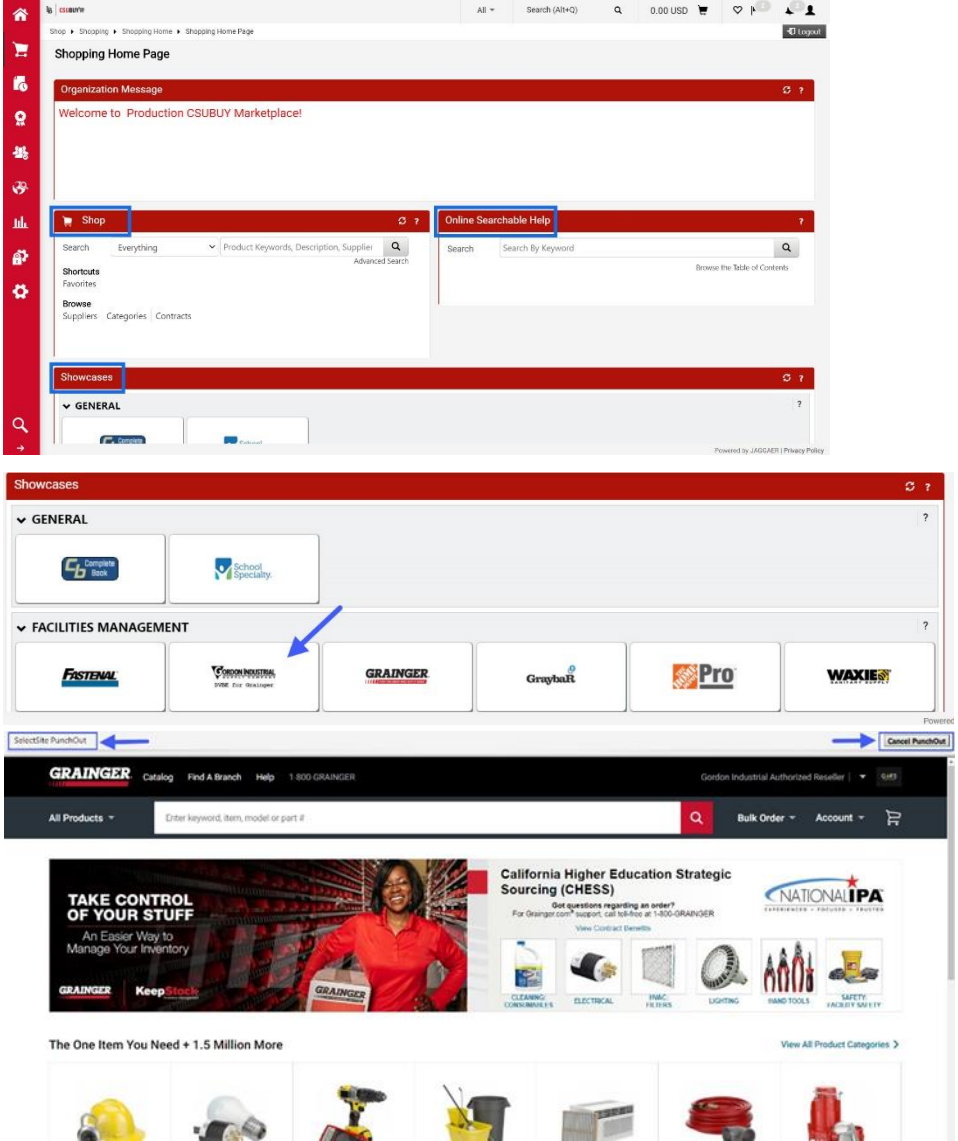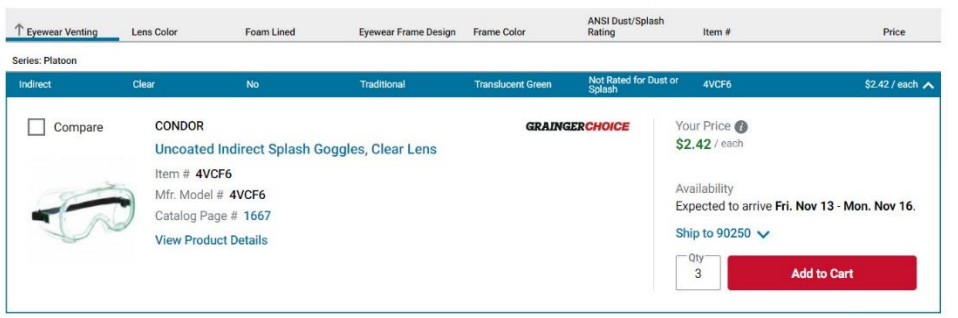| Processing Steps / Field Name	Screenshot / Description
Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page **Step 2:** Select "View My Profile" from the drop-down menu.	Search (Alt+Q) 0.00 USD ♡ ♡ ●Logout End User View My Profile ← Dashboards Manage Searches Manage Search Exports Set My Home Page You do not have any recent orders Logout Help

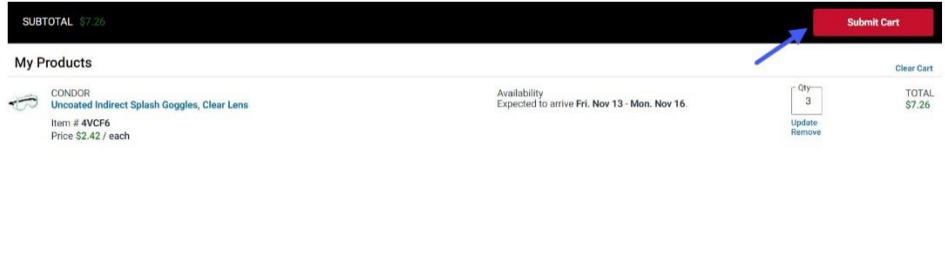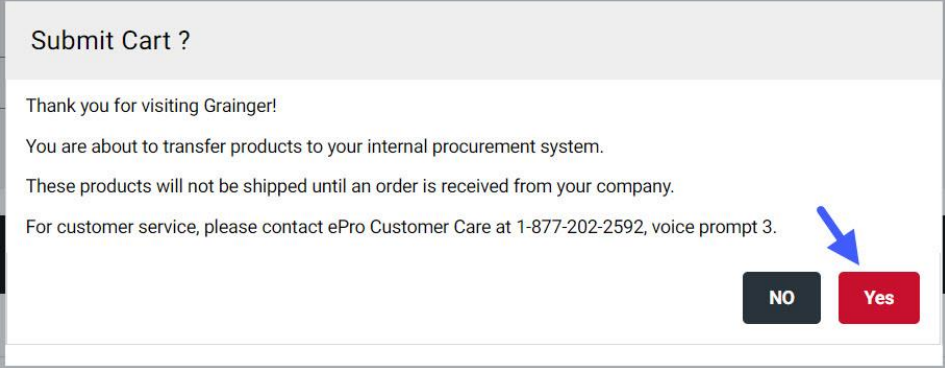| Processing Steps / Field Name	Screenshot / Description

Step 3: In the User Profile, select "Default User Settings, then "Cart Assignees" from the drop-down menu.
 	
NOTE: In order for the Assignee names to be visible, the CSULB end user must have previously logged into CSUBUY.
 	
If the Assingee has not logged into CSUBUY, consult with the Department ASM.
	User Profile and Preferences ›
	
	Default User Settings ← ‹
	    Custom Field and Accounting Code Defaults
	    Default Addresses
	    Cart Assignees ←
	    Checkout Settings
	    Payment Options
	User Roles and Access ›
	Ordering and Approval Settings ›
	Permission Settings ›
	Notification Preferences ›
	User History ›
	Administrative Tasks ›

Step 4: Click "Add Assignee". This action opens a User Search page with a pop-up window with various search fields.	**Cart Assignees** Add Assignee... ← **My Cart Assignees** ? Name Action Requester Alvear Set as Preferred Remove
Step 5: Type the last name and first name of the chosen Department Requester (aka the Assignee). **Step 6:** Click "Search".	User Search - Google Chrome 🔒 solutions.sciquest.com/apps/Router/GenericUserSearch?Tmstmp=1605045355310226&returnFunction=setUserFr... **User Search** ? Last Name → alvear First Name User Name Email Campus Campus Name 🔍 Department Position Role Results Per Page 10 Search →

Processing Steps / Field Name	Screenshot / Description
Step 7: After verifying the correct Requester's name and email under the <u>Action</u> column, click the "select" link. **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).	New Search 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]
Step 8: To add more assignees, follow steps 4-7.	**Cart Assignees** Add Assignee... ⬅ **My Cart Assignees** ? **Name** / **Action** Requester Alvear [Set as Preferred] [Remove]
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. If necessary, Shoppers may also remove Requesters.	**Cart Assignees** Add Assignee... **My Cart Assignees** ? **Name** / **Action** **Requester Alvear (Preferred Assignee)** [Remove Preferred] [Remove] Requester Murray [Set as Preferred] [Remove]

4.2   **Shopping for Department Supplies**

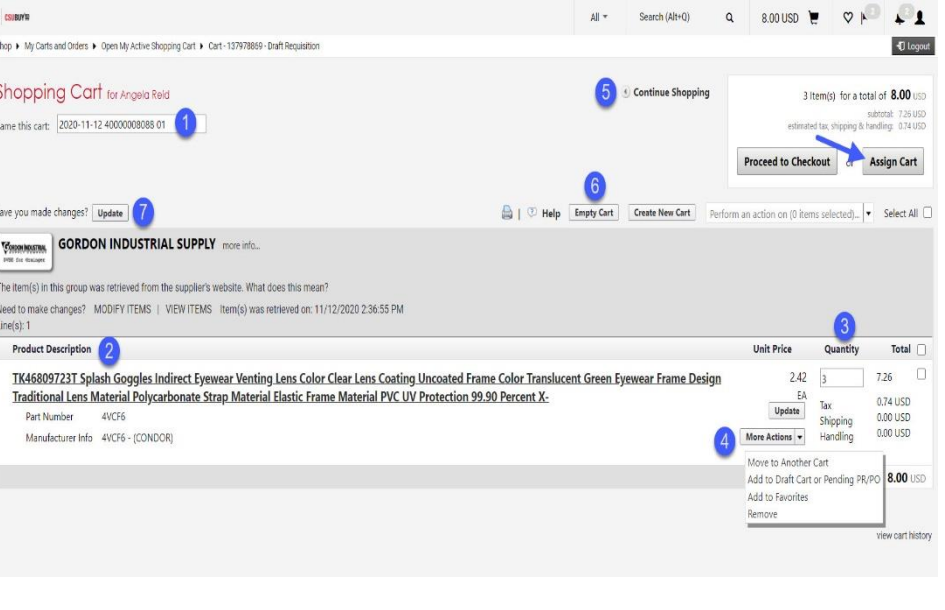Shoppers will shop for department supplies in the CSUBUY Marketplace from various contract suppliers.
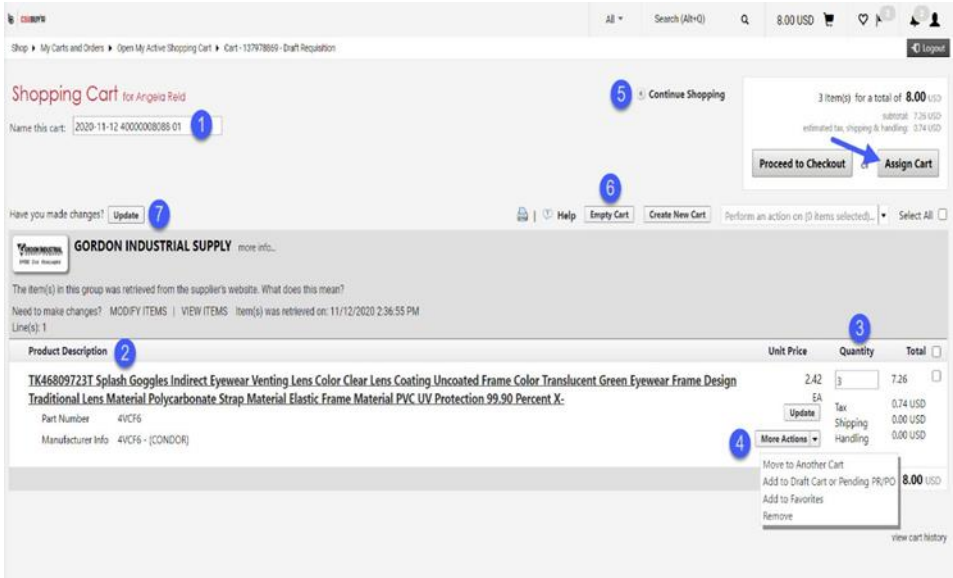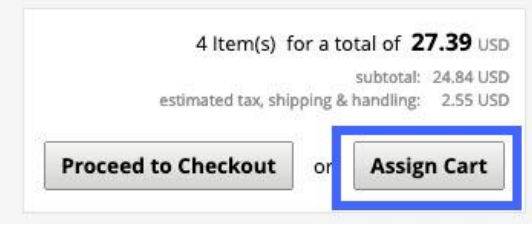
4.2.1 Creating a Cart

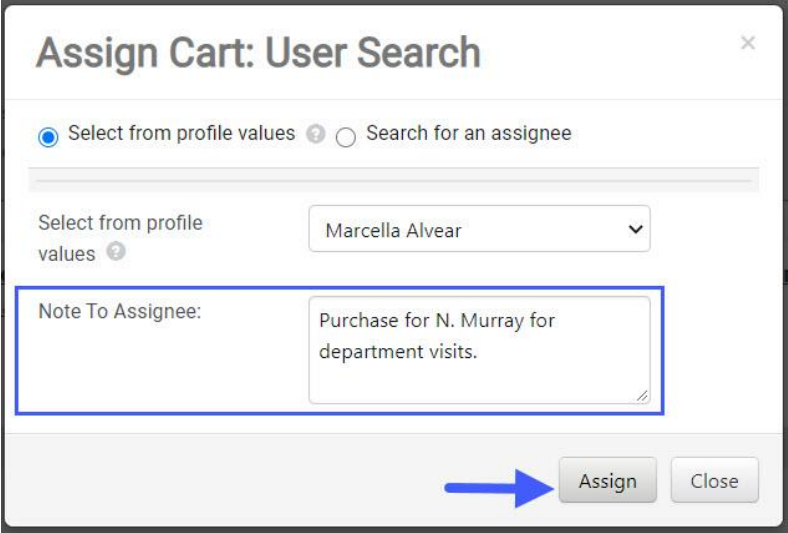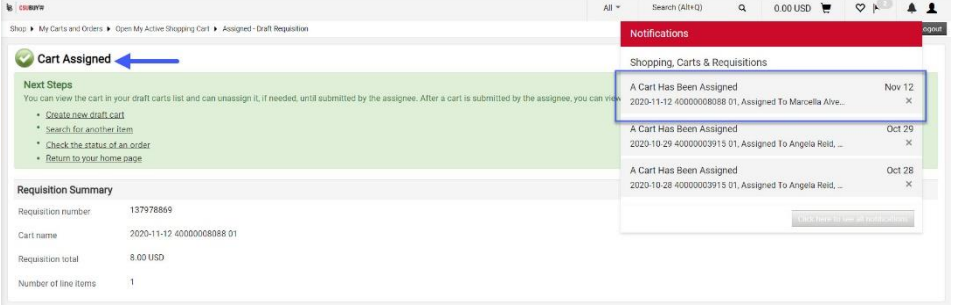| Processing Steps / Field Name	Screenshot / Description
Step 1: Use any of the search fields in the **Shop** section. Or, click on a supplier catalog in the **Showcase** section. This action will "punch out", or redirect the Shopper to the supplier's website. Once the Shopper enters the supplier's website, the shopping experience will be similar to other online shopping platforms.	
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. **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.	

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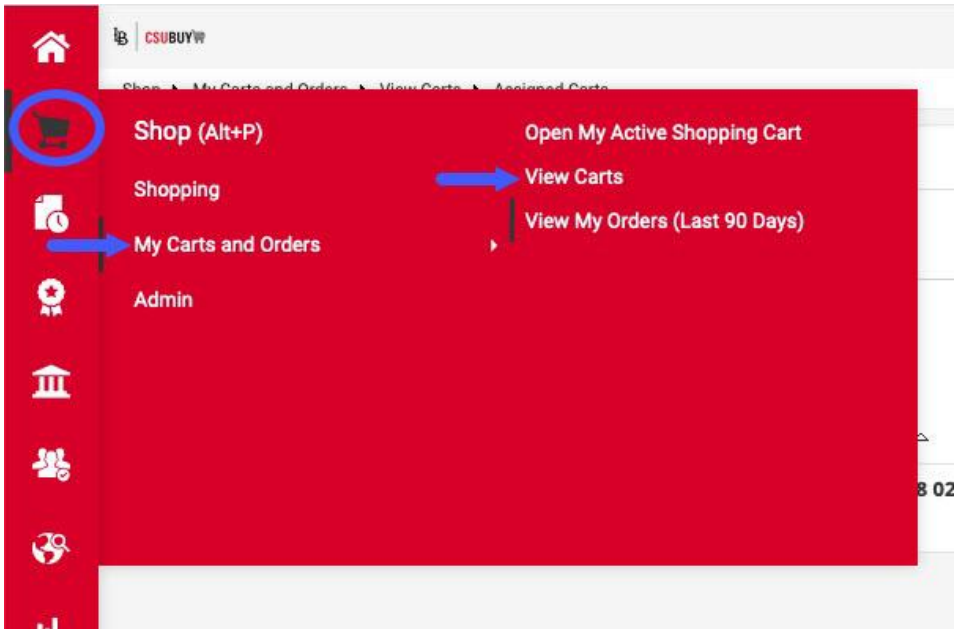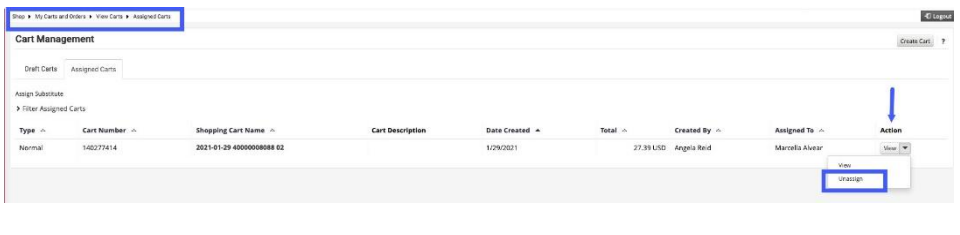
4.2.2   Assigning a Cart

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
Step 1: Items to view on the Cart – Requisition page: 1) **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. 2) **Product Description**: Review the supplier and product information to ensure	

Processing Steps / Field Name	Screenshot / Description
the cart contains the correct items, sizes, quantity, etc. 3) **Quantity**: Shoppers may make changes to the quantity if needed by using this field. 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. 5) **Continue Shopping**: Click "Continue Shopping" to return to the Shopping Home Page to search or choose different catalogs to shop for more items. 6) **Empty Cart**: Click "Empty Cart" to empty all items from the cart and cancel the purchase or start over. 7) **Update**: Click "Update" to refresh the shopping cart to reflect any changes made during the cart review. **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 "<u>My Carts and Orders</u>", "<u>Open My Active Shopping Cart</u>", then choose the saved cart.	
Step 2: Select "Assign Cart" to open the <u>Assign Cart: User Search</u> popup.	

Processing Steps / Field Name	Screenshot / Description
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. **Step 5:** Use the "Note To Assignee" field to enter information that will assist department Pro Cardholders with the month-end reconciliation process. The minimum information should be: 1) who the purchase is for; 2) the department or university business purpose for the purchase; 3) and any other relevant information. **Step 6:** Click "Assign".	
This action confirms the cart has been assigned and adds the confirmation to the Shopper's list of <u>Shopping, Carts & Requisitions</u> notifications. This action completes the shopping process.	

Processing Steps / Field Name	Screenshot / Description
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".	
Step 8: In the Cart Management page, locate the order to unassign. **Step 9:** Select "Unassign" from the <u>Actions</u> drop-down menu. This action will unassign the cart.	

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 <u>must</u> follow the **How to Purchase to Pay** and **Procurement Card Guidelines**.
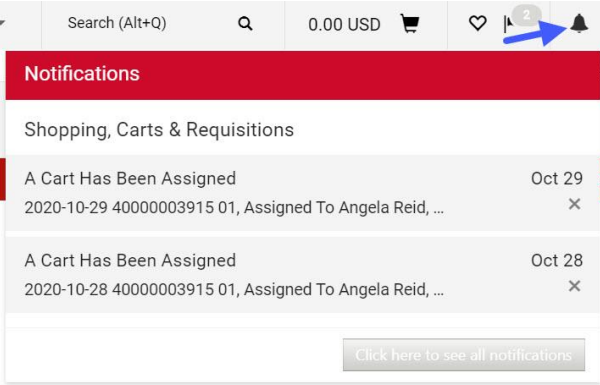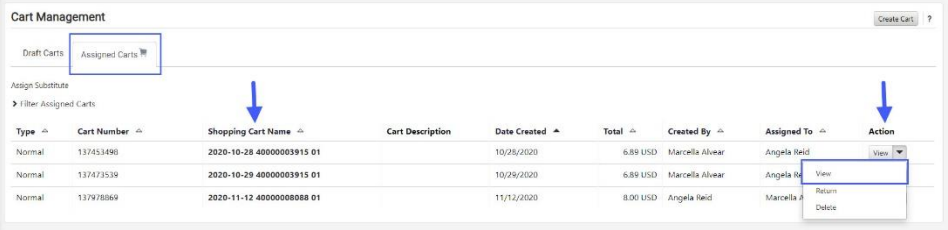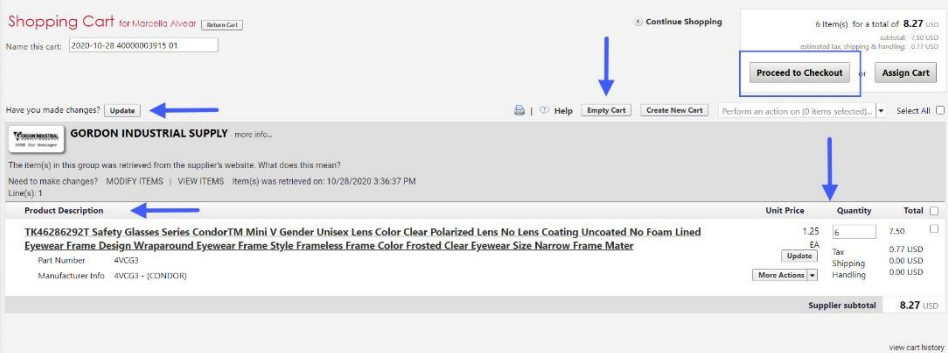
5.1   **Add a Pro Card to Your Profile**

Requesters, before approving a shopping cart and completing the purchase process, must enter their Pro Card (credit card) into their CSUBUY profile. Requesters are <u>not</u> to use personal cards or accounts for purchases from the CSUBUY Marketplace.
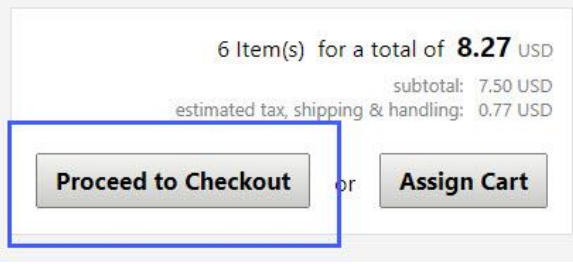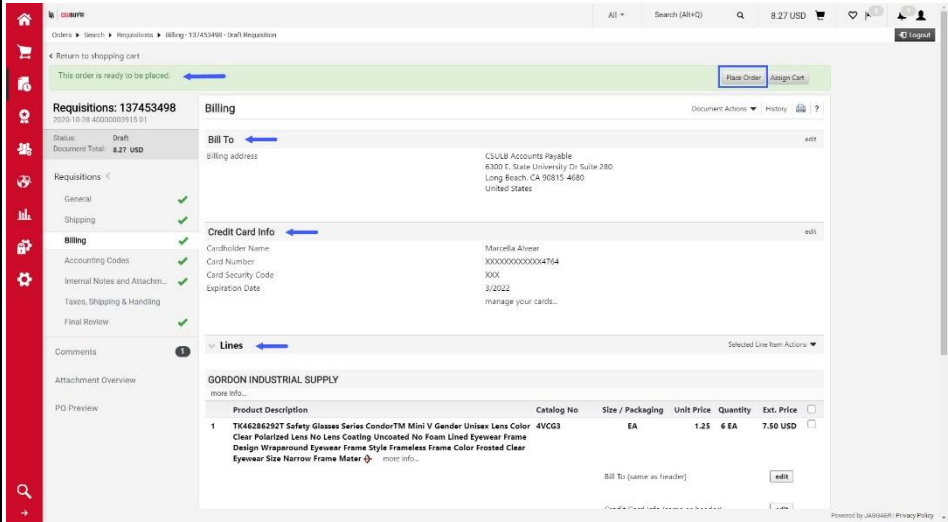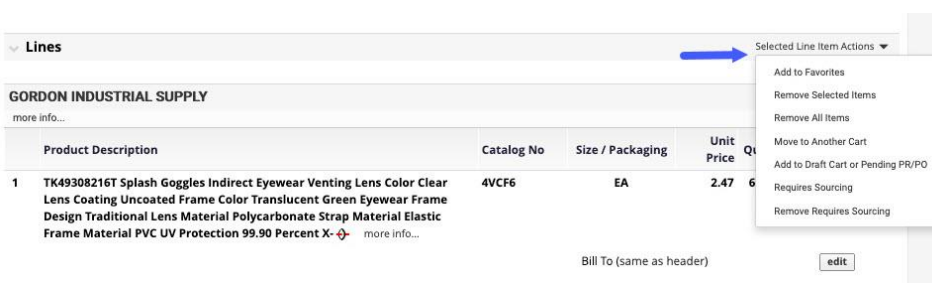
Processing Steps / Field Name	Screenshot / Description
Step 1: Click the User Profile icon located in the ribbon at the top of the Shopping Home Page **Step 2:** Select "View My Profile" from the drop-down menu. This action opens the end user's profile, displaying the user's name, phone number, email, etc.	
Step 3: Select "Default User Settings", then "Payment Options".	
Step 4: Click "Add a New Card".	
Step 5: Enter the card details in the following fields: Name this card, Cardholder Name, Card Number and Expiration Date. **Step 6:** Click the "default card" checkbox. **Step 7:** Click "Save".	
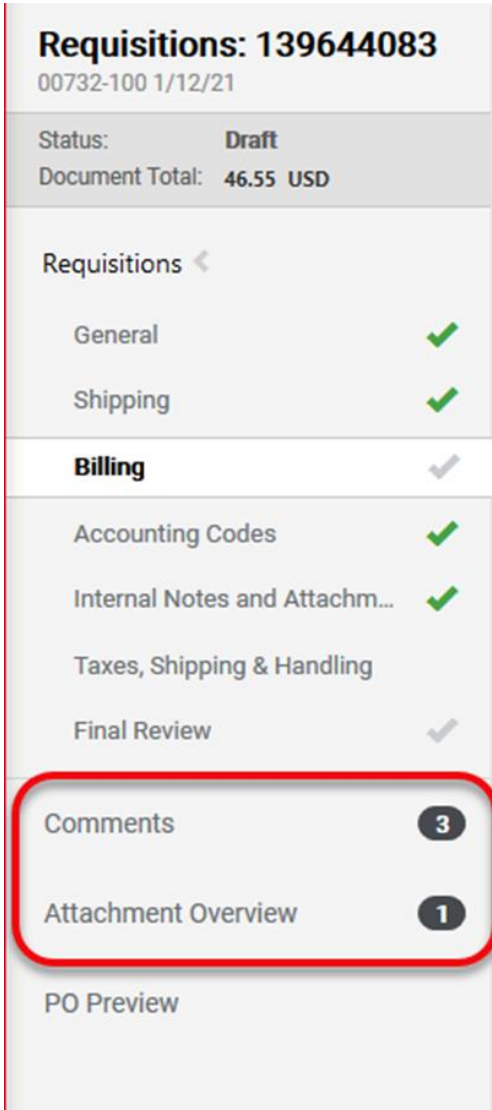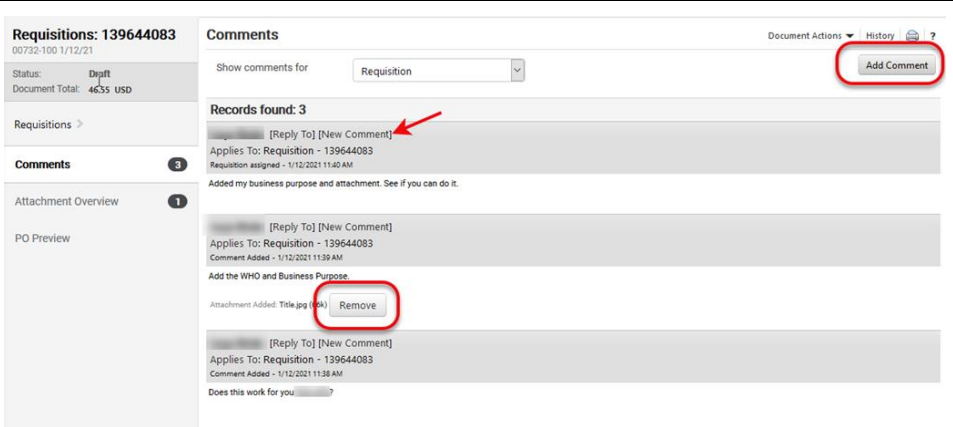
5.2   Accept a Shopping Cart
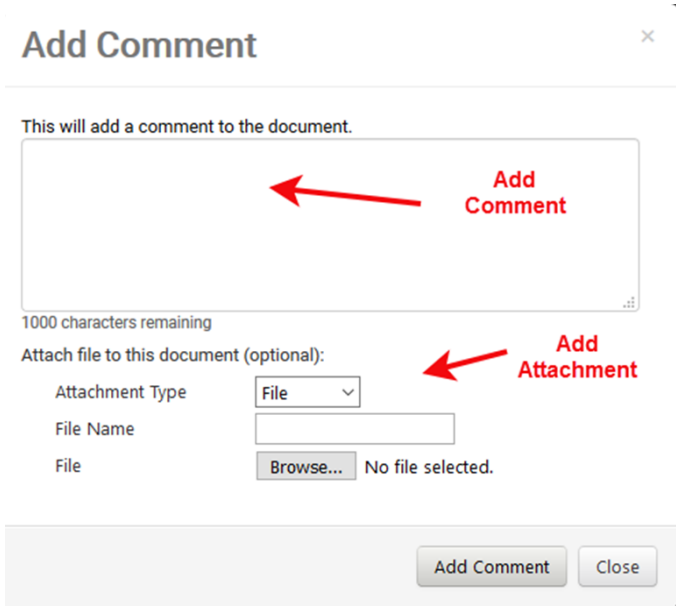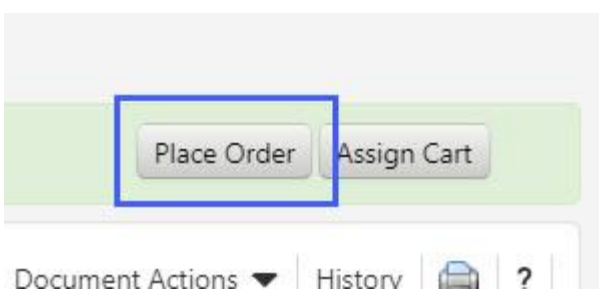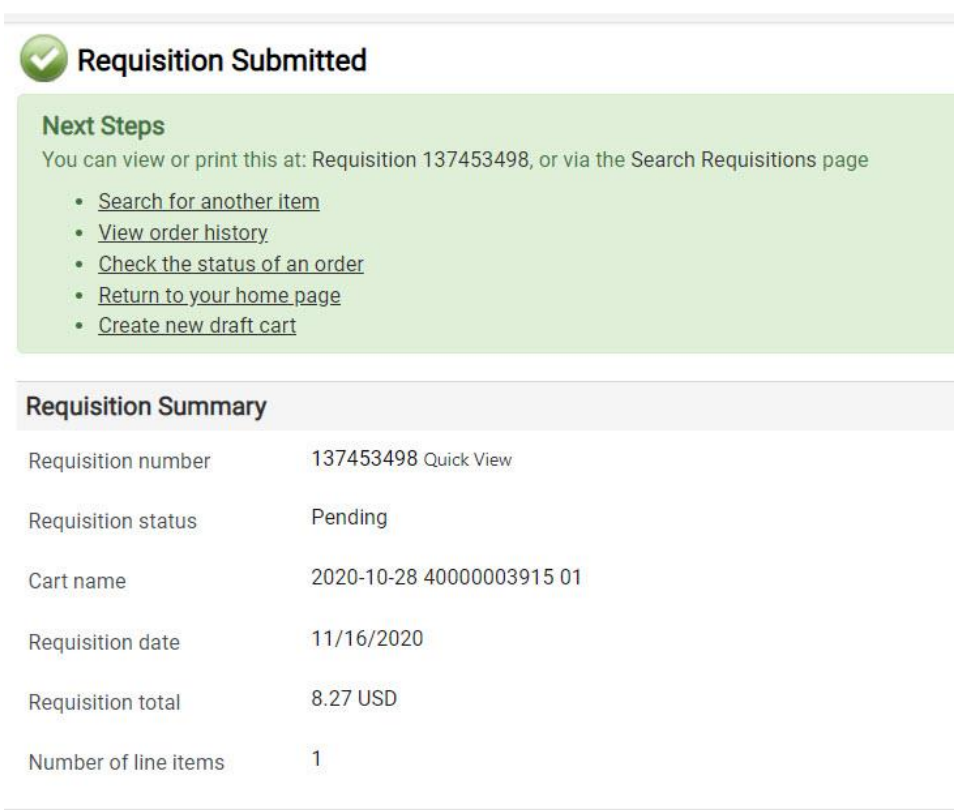
Once Requesters have set their notification preferences and entered their credit card details, they are now prepared to accept a shopping cart and pay for department supplies.

Processing Steps / Field Name	Screenshot / Description
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. This action opens the Cart Management page.	
Step 2: In the Cart Management page and Assigned Carts 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. Requesters are encouraged to review the cart details, particularly the product description, quantity, price, and any other relevant information before completing the purchase.	
Requesters may update purchase information or empty a shopping cart. **Step 3:** If making changes, click "Update".	

5.3   **Checkout and Pay**

Processing Steps / Field Name	Screenshot / Description
Step 1: Click "Proceed to Checkout." This action opens the Billing page.	6 Item(s) for a total of **8.27** USD subtotal: 7.50 USD estimated tax, shipping & handling: 0.77 USD **Proceed to Checkout** or **Assign Cart**
The Billing page shows the order is ready to be placed. 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.	
Requesters may also select line item actions from the drop-down menu.	
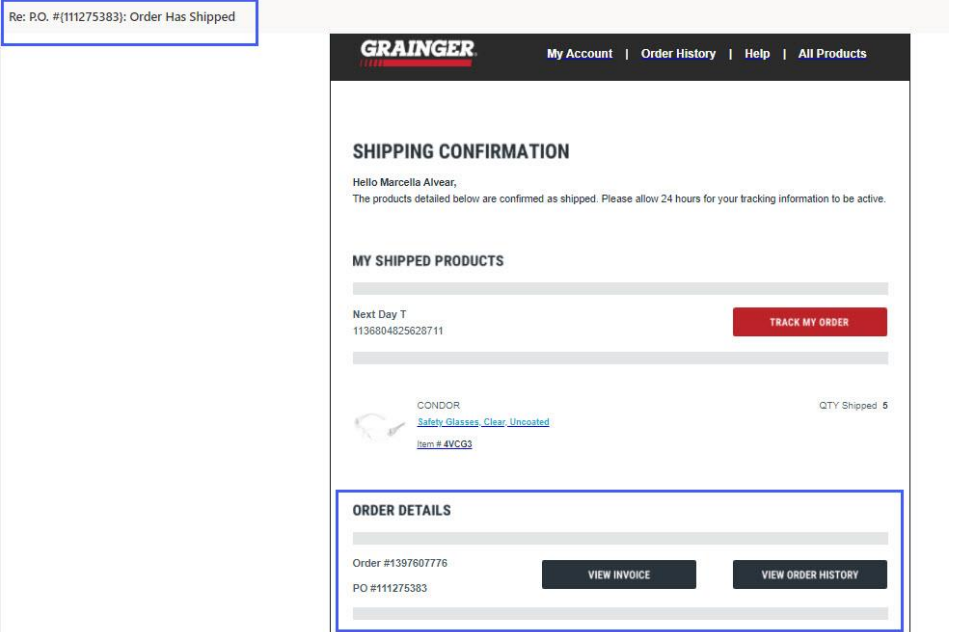
Processing Steps / Field Name	Screenshot / Description
Shoppers may add notes regarding the purchase, and attach required forms (i.e., Hospitality and approval of ATI/ITC) in the Billing page. **Step 2:** Using the Requisitions navigation menu in the Billing page (which is not equivalent to a PeopleSoft Requisition) select "Comments" to see comments entered by the Shopper. **Step 3:** Select "Attachment Overview" to see attached files.	**Requisitions: 139644083** 00732-100 1/12/21 Status: **Draft** Document Total: **46.55 USD** Requisitions ‹ General ✔ Shipping ✔ **Billing** ✔ Accounting Codes ✔ Internal Notes and Attachm... ✔ Taxes, Shipping & Handling Final Review ✔ Comments ③ Attachment Overview ① PO Preview
The Comments section is for the Requester to include their own addition notes should the comments need to be referenced during month-end reconciliation. **Step 4:** Click "Add Comments" to add a new comment or attach forms and/or documents.	Requisitions: 139644083 00732-100 1/12/21 Status: Draft Document Total: 46.55 USD Requisitions › Comments ③ Attachment Overview ① PO Preview **Comments** Document Actions ▾	History 🖶	? Show comments for Requisition ▾ Add Comment Records found: 3 _____ [Reply To] [New Comment] Applies To: Requisition - 139644083 Requisition assigned - 1/12/2021 11:40 AM Added my business purpose and attachment. See if you can do it. _____ [Reply To] [New Comment] Applies To: Requisition - 139644083 Comment Added - 1/12/2021 11:39 AM Add the WHO and Business Purpose. Attachment Added: Title.jpg (jpk) Remove _____ [Reply To] [New Comment] Applies To: Requisition - 139644083 Comment Added - 1/12/2021 11:38 AM Does this work for you _____?
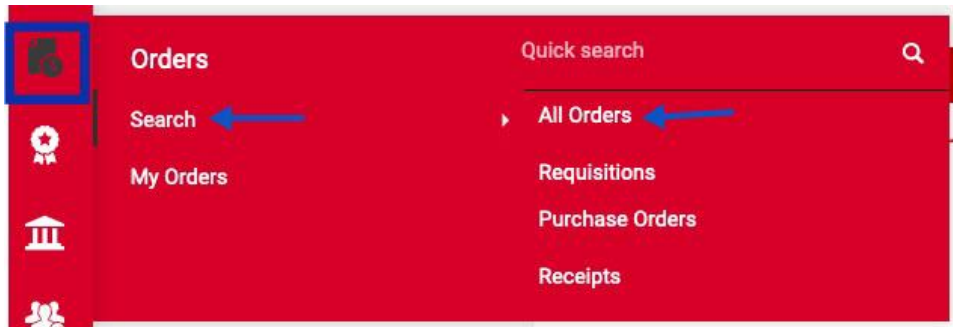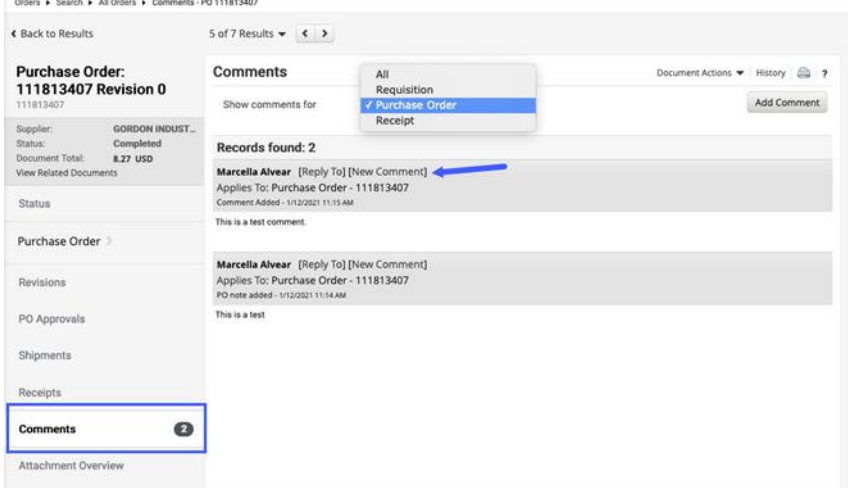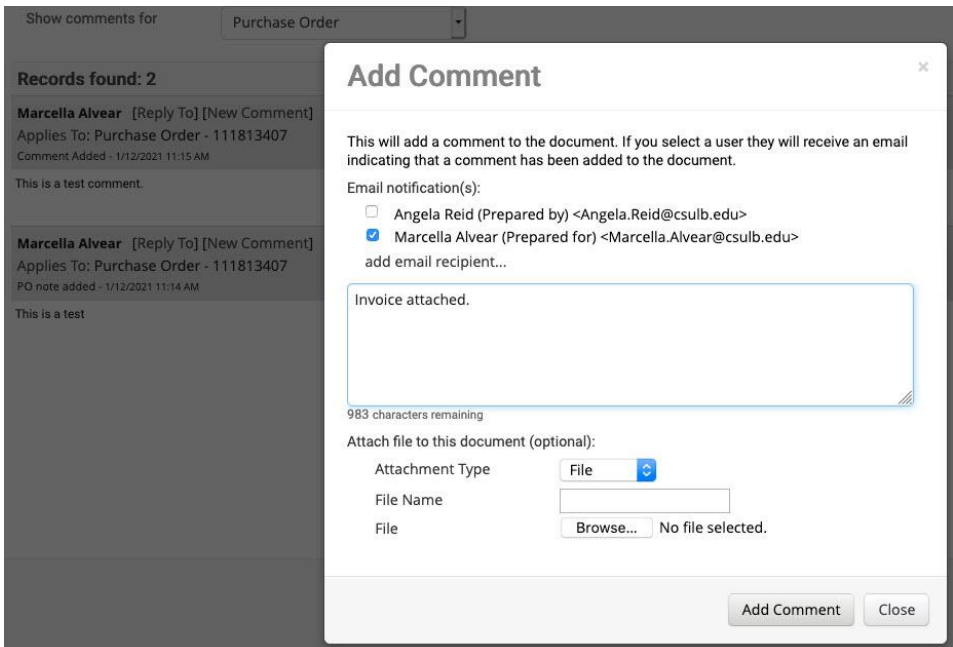
Processing Steps / Field Name	Screenshot / Description
Step 5: Use the Add Comment window to add a new comment or to attach a file. This is where Shoppers will upload any required forms and/or documents. Requesters can use this tool to collect required documents, such as invoices. **NOTE**: Users would click "Remove" to delete attached documents or to delete comments if necessary.	**Add Comment** ✕ This will add a comment to the document. ← **Add Comment** 1000 characters remaining Attach file to this document (optional): ← **Add Attachment** Attachment Type [File ▾] File Name [ ] File [Browse...] No file selected. [Add Comment] [Close]
Step 6: In the Billing page, click "Place Order" to finalize the purchase.	[Place Order] [Assign Cart] Document Actions ▼ | History 🖨 | ?
This action completes the purchase process, and creates a requisition number and requisition summary.	✅ **Requisition Submitted** **Next Steps** You can view or print this at: Requisition 137453498, or via the Search Requisitions page • Search for another item • View order history • Check the status of an order • Return to your home page • Create new draft cart **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

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

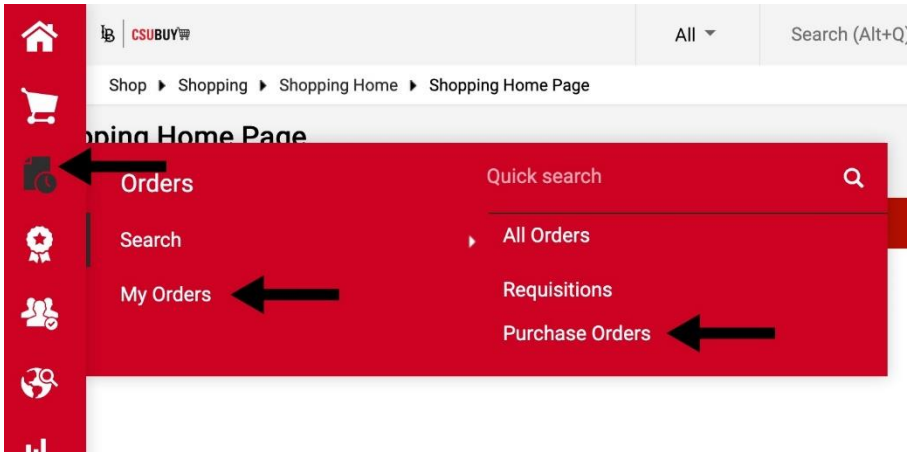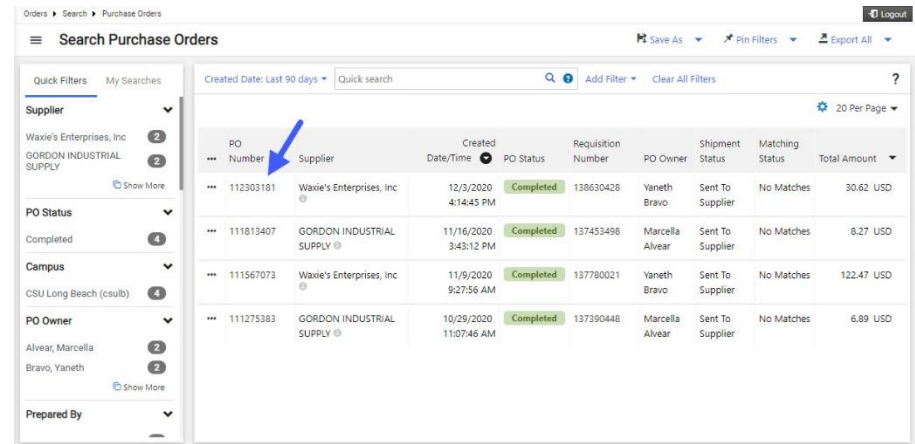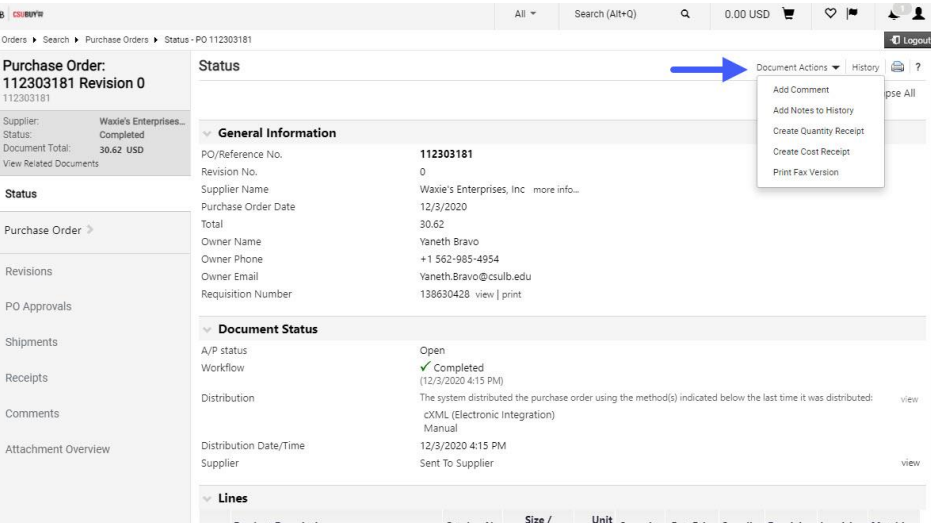| Processing Steps/Field Name	Screenshot / Description
Shoppers will receive an email notification that includes the assigned cart and assignee information. The note to the assignee is included in the email notification.	Re: A shopping cart has been assigned to you Cart Name: 2020-10-28 40000003915 01 Cart Number: 137453498 Prepared for: Marcella Alvear (Campus: CSU Long Beach) Prepared by: Angela Reid Dear Marcella Alvear 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. https://solutions.sciquest.com/apps/Router/ViewAssignedCarts?AuthUser=7317832&ParamAction=View&CartId=137453498&tmstmp=1603924654854 If applicable, the user has submitted the following additional comments: Order for the Purchasing Department, thank you. Marcella If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team. Support Team Contact Information: Thank you, CalState
Shoppers will receive the invoice by email from the supplier when the items are shipped.	Re: P.O. #(111275383): Order Has Shipped **GRAINGER** My Account | Order History | Help | All Products **SHIPPING CONFIRMATION** Hello Marcella Alvear, The products detailed below are confirmed as shipped. Please allow 24 hours for your tracking information to be active. **MY SHIPPED PRODUCTS** Next Day T 1136804825628711 **TRACK MY ORDER** CONDOR QTY Shipped 5 Safety Glasses, Clear, Uncoated Item # 4VCG3 **ORDER DETAILS** Order #1397607776 **VIEW INVOICE** **VIEW ORDER HISTORY** PO #111275383

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

6.2 **Requester Notifications**

Processing Steps/Field Name	Screenshot / Description
Requesters will receive an email confirming a shopping cart has been assigned to them. The note typed in the Assign Cart: User Search window appears in the email.	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 Dear Marcella Alvear 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. https://solutions.sciquest.com/apps/Router/ViewAssignedCarts? AuthUser=7317832&ParamAction=View&CartId=137978869&tmstmp=1605222812063 If applicable, the user has submitted the following additional comments: Purchase for N. Murray for department visits. If you have any questions with regard to this shopping cart, please contact your SelectSite Support Team. Support Team Contact Information: Thank you, CalState
Requesters will receive a notification of the submitted requisition after placing an order.	Re: REQUISITION SUBMITTED FOR APPROVAL #: 137453498 Cart Name: 2020-10-28 40000003915 01 Prepared for: Marcella Alvear Prepared by: Angela Reid Dear Marcella Alvear, 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. View Requisition If you have any questions with regard to your requisition, please contact your SelectSite Support Team. Support Team Contact Information: Thank you, CalState

Processing Steps/Field Name	Screenshot / Description
Requesters will receive a notification that the purchase order has been created and has been sent to the supplier.	Re: PURCHASE ORDER#: 111813407 Cart name: 2020-10-28 40000003915 01 Requisition number: 137453498 Supplier: GORDON INDUSTRIAL SUPPLY Sent Via: CXML Date/Time: 11/16/2020 3:43 PM Dear Marcella Alvear, The purchase order listed above has been created for your requisition "2020-10-28 40000003915 01 (137453498)" and has been sent to the supplier. You can update and track the status of this purchase order on line by using " document search ", or by selecting the URL below. View Purchase Order If you have any questions with regard to your purchase order, please contact your SelectSite Support Team. Support Team Contact Information: Thank you, CalState
Requesters will receive a PO Acknowledgment email from the supplier.	FW: GRAINGER PO Acknowledgement for PO #: 111275383- 4TH EMAIL CAUTION: This email was sent from an external source. ** Subject: GRAINGER PO Acknowledgement for PO #: 111275383 To: MARCELLA.ALVEAR@CSULB.EDU gis_edi@notes.grainger.com Date: 10/29/2020 13:15 ** * DO NOT RESPOND DIRECTLY TO THIS EMAIL * * IF YOU HAVE ANY QUESTIONS REGARDING YOUR ORDER * * PLEASE CALL US TOLL-FREE AT 1-877-202-2592, M-F 7AM - 6PM CST * * OR EMAIL US BY ACCESSING THE (HELP->EMAIL US) OPTION * * VIA YOUR PUNCH-OUT OR https://nam12.safelinks.protection.outlook.com/? uri=http%3A%2F%2Fwww.grainger.com%2F&data=04%7C01%7CAngela.Reid%40csulb.edu%7C1cp10e15fbb148d15f3708d87c375179%7C9175679bacd34644be82af041982977a%7C0%7C0%7C637395924319333361%7CUnknown%7CTWFp bGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=Fv0d%2F%2BruUc7sQ4x9iW%2BTEJKx9wco7FGioYiEzIphnRWA%3D&reserved=0 * ** Account#: 0805396815 Order Number: 1397607776 Order Date: 10/29/2020 PO Number: 111275383 PO Date: 10/29/2020 CONTACT INFORMATION Buyer: MARCELLA ALVEAR Phone: 5629854663 Attention: MARCELLA ALVEAR SHIP TO SOLD TO ---------------- ---------------- CSU LONG BEACH CALIFORNIA STATE UNIVERSITY 1331 Palo Verde Ave 1331 PALO VERDE AVE Deliver To purchasing Bh-346 Long Beach CA 90840 LONG BEACH CA 90840 Qty UOM Item# Description PO PRICE Unit Price Ext. Price --

7.0   Accessing Past Orders

Processing Steps / Field Name	Screenshot / Description
Step 1: Click the Orders icon on the left navigation pane. **Step 2:** Select "My Orders", then "Purchase Orders". This action displays a list of completed purchase orders placed in CSUBUY.	
Step 3: Select a specific PO number hyperlink to access general information such as the document status and the product description.	
Step 4: Click "Document Actions" for optional actions, such as adding comments, adding notes to the transaction history, or creating quantity receipts.	