

How-To Guide for End Users

CSUBUY Marketplace roles of Shopper, Requester and Receiver perform several actions related to searching for supplier goods and services, creating shopping carts, placing orders and tracking order status. This guide provides instructions on key features and functionality performed by Shopper, Requester and Receiver roles in the **CSUBUY** Marketplace.

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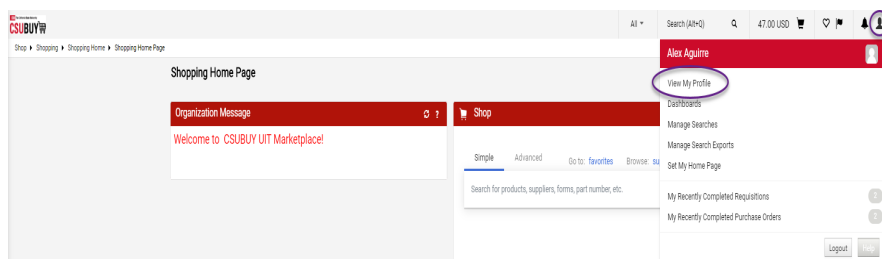
Login URL

- Test Environment - <https://ds.calstate.edu/?svc=csubuy&env=test>
- Production Environment – TBD

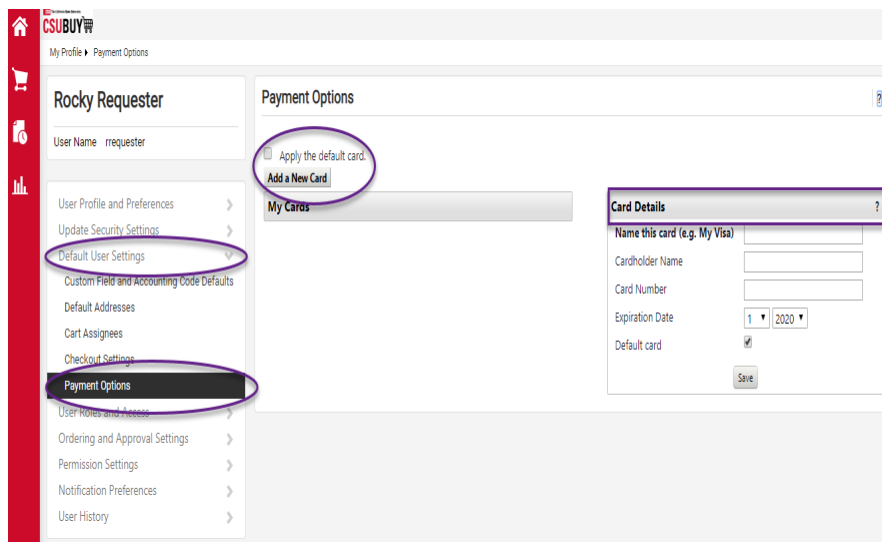
Updating your User Profile

How to add a Pcard to your profile

1. Click on View My Profile



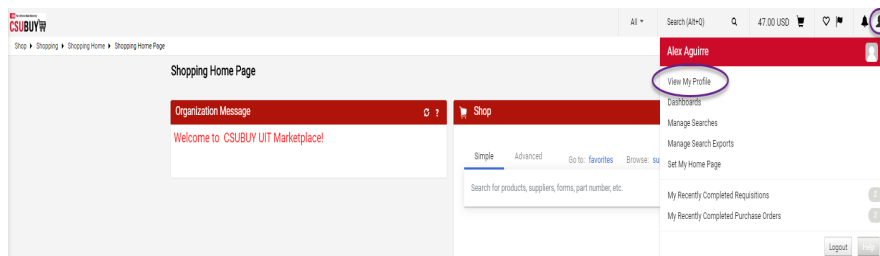
2. Navigate to Default User Settings → Payment Options



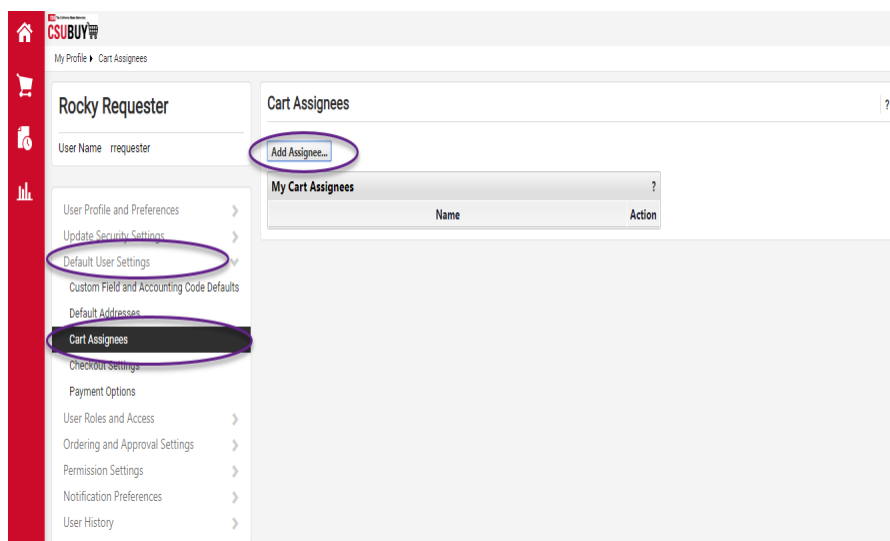
3. Click Add a New Card and enter in the Pcard details
4. To have your Pcard default in your shopping cart select “Default card”

How to add your favorite Requester(s) to your profile

1. Click on View My Profile



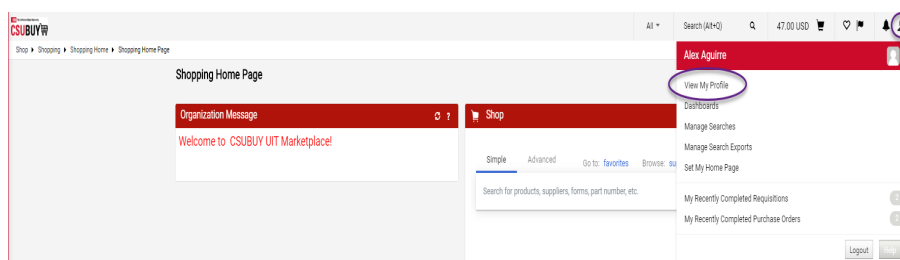
2. Navigate to Default User Settings → Cart Assignees



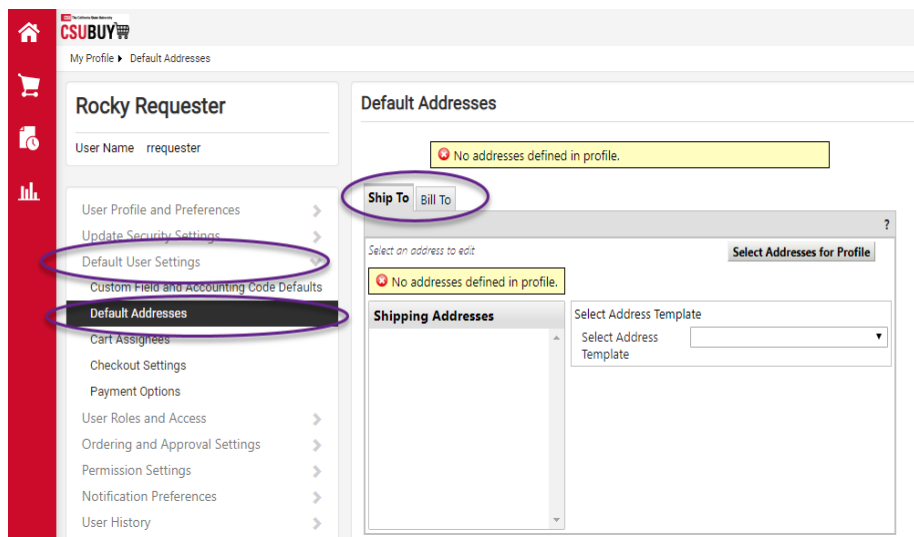
3. Click Add Assignee and search for the appropriate requester(s)
4. Multiple requesters can be added, and you can select one as preferred (default)

How to add your favorite ship to address(es) to your profile

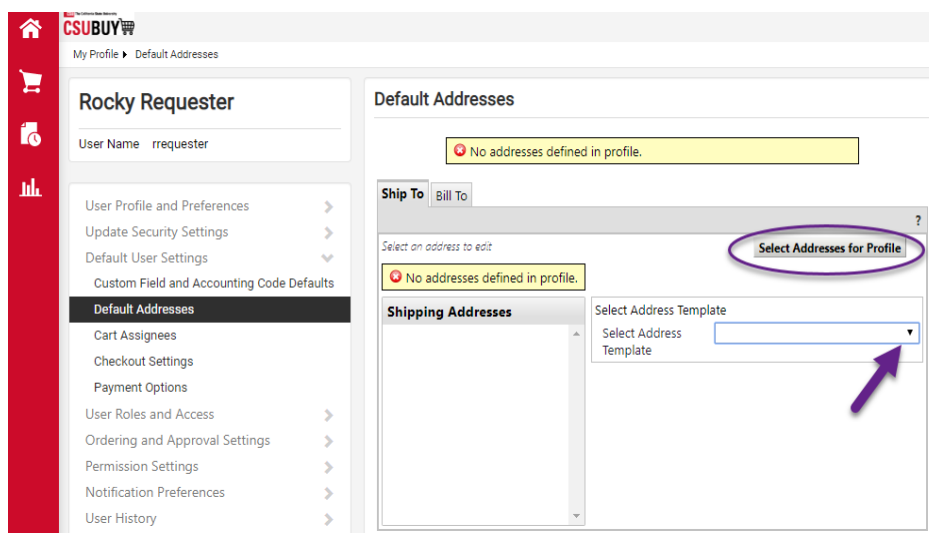
1. Click on View My Profile



2. Navigate to Default User Settings → Default Addresses



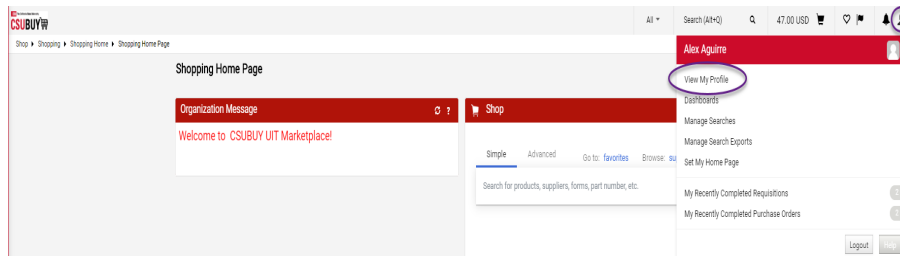
3. Click Select Addresses for Profile and choose appropriate address(es)



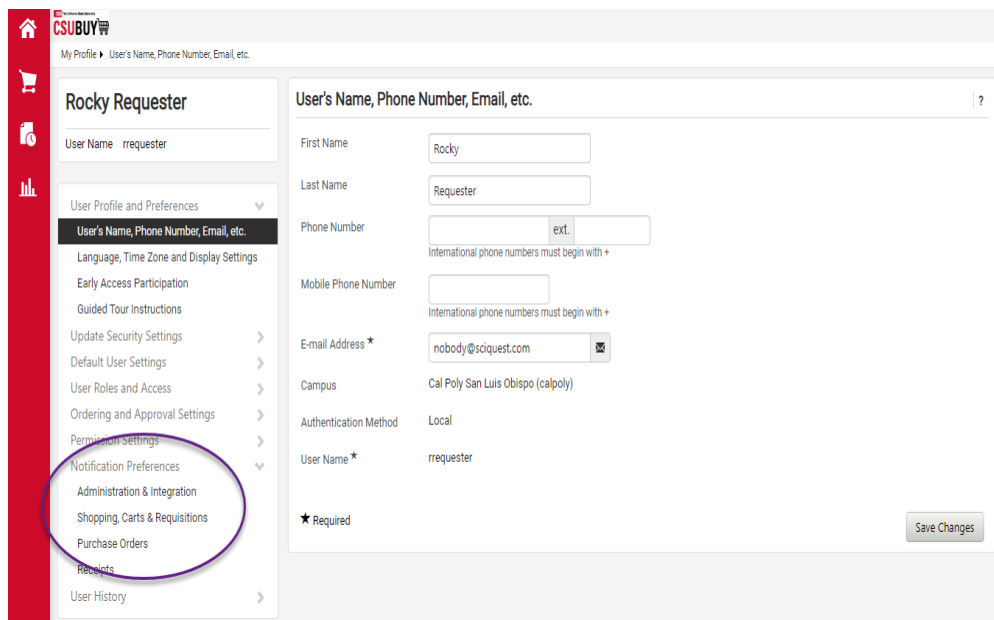
4. Choose the default box for the address you would like to default when checking out

How to update your system notifications

1. Click on View My Profile



2. Navigate to Notification Preferences



3. Select Shopping Carts & Requisitions/ Purchase Orders

Rocky Requester
User Name requester

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences >
- Administration & Integration**
- Shopping, Carts & Requisitions**
- Purchase Orders
- Receipts
- User History >

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	None
Assigned Cart Deleted Notification	None
PR submitted into Workflow	None
PR pending Workflow approval	None
PR Workflow Notification available	None
PR Workflow complete / PO created	None
PR line item(s) rejected	Email & Notification
Cart/PR rejected/returned	Email & Notification

4. Click on Edit Section
5. Click Override on the field you want to update

My Profile > Notification Preferences > Shopping, Carts & Requisitions

Rocky Requester
User Name requester

Shopping, Carts & Requisitions

Notification Preferences: Shopping, Carts & Requisitions

The in-application notifications are not yet available for all Email Notifications.

Prepared By - Cart Assigned Notice	<input type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR line item(s) rejected	<input type="radio"/> Default <input type="radio"/> Override	None
Prepared By - PR rejected/returned	<input type="radio"/> Default <input type="radio"/> Override	None
Cart Assigned Notice	<input type="radio"/> Default <input type="radio"/> Override	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	<input type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Processed Notification	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
Assigned Cart Deleted Notification	<input type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input type="radio"/> Default <input type="radio"/> Override	None
PR pending Workflow approval	<input type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input type="radio"/> Default <input type="radio"/> Override	Email & Notification
Cart/PR rejected/returned	<input type="radio"/> Default <input type="radio"/> Override	Email & Notification

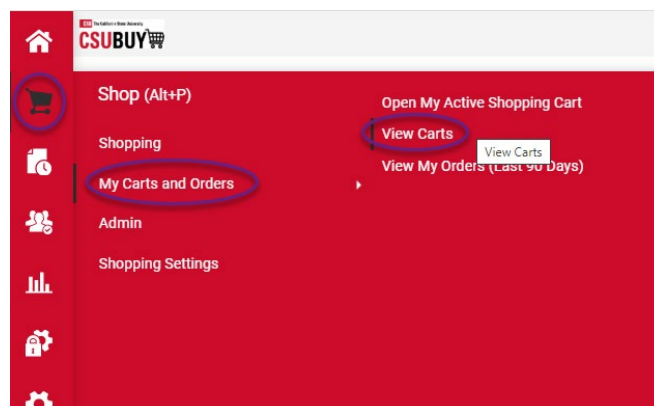
Save Changes Cancel

6. Select appropriate option from the dropdown
7. Click Save Changes

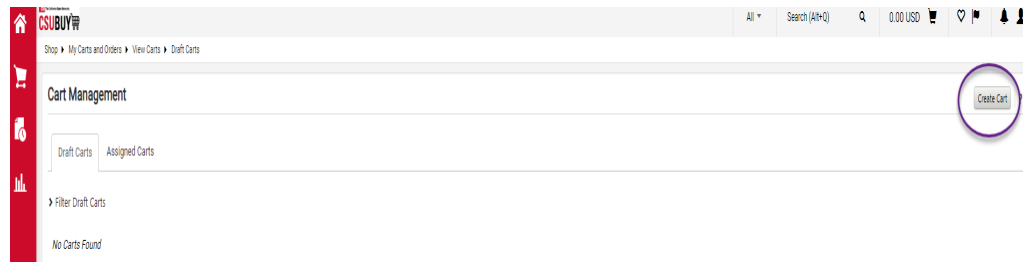
Shopping

How to create a cart

1. Navigate to Shop → My Carts and Orders → View Carts

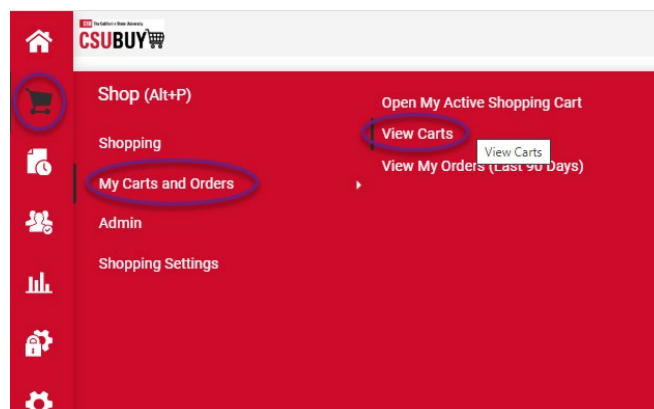


2. Click Create Cart



How to see your draft carts

1. Navigate to Shop → My Carts and Orders → View Carts

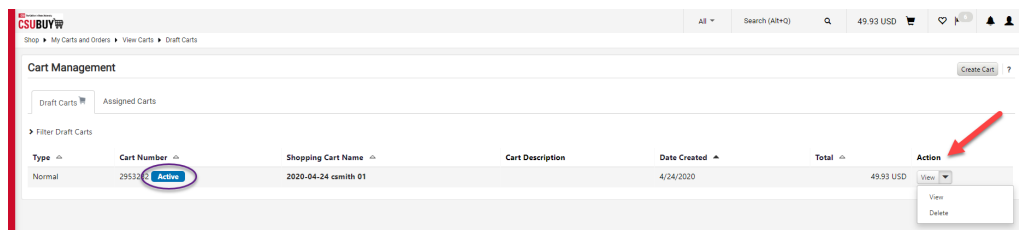


2. Click Draft Carts



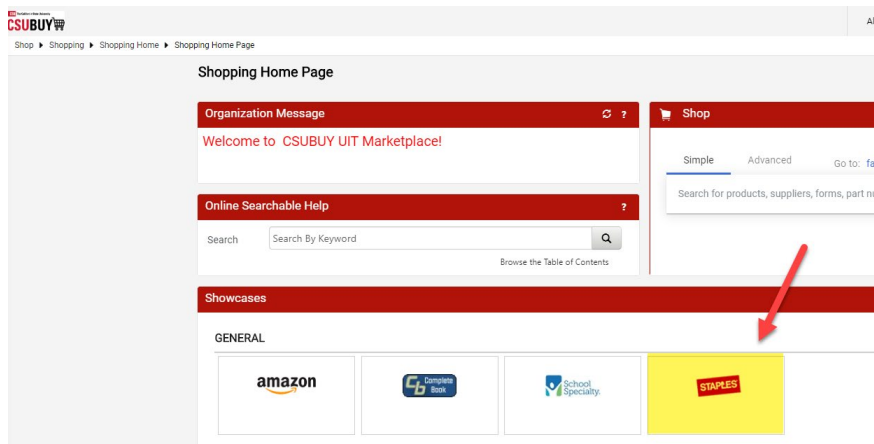
3. Select appropriate Shopping Cart Name to make that the active cart

4. Select the Action Dropdown to View, Activate or Delete the cart



How to punchout to a supplier catalog

1. Navigate to the Home Page Menu Option
2. Look for the Punch-Out Catalogs Showcase
3. Click on the desired supplier



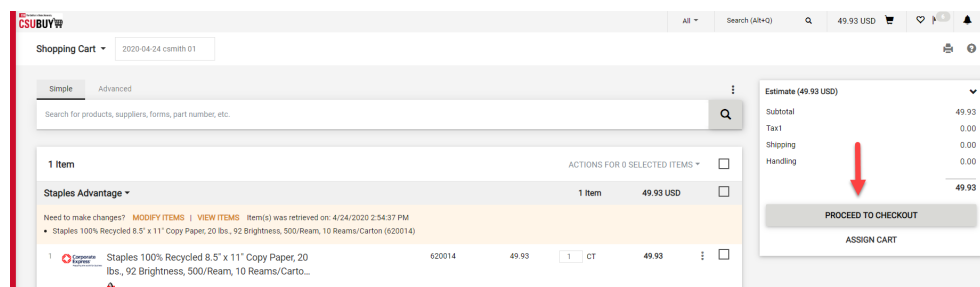
4. Click Cancel PunchOut to return to CSU BUY



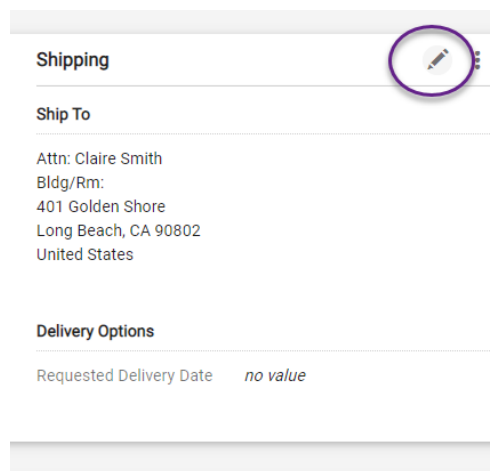
Ordering

How to add/edit your order's ship to address

1. Click on Proceed to Checkout



2. Click the pencil icon on the shipping header






3. Click on Search additional to see available addresses
4. Select appropriate address, complete Blg/Rm
5. Click Add to my addresses
6. Give it a nickname and make it your default if applicable
7. Save changes

Edit Shipping

Ship To

CURRENT ADDRESS

Attn: *	Claire Smith		Add to my addresses
Bldg/Rm:			Nickname
Address Line 1	401 Golden Shore		Name this address (e) 
City	Long Beach		
State	CA		
Zip Code	90802		
Country	United States		
			Make default

☐ **CSU Chancellor's Office3** - Claire Smith, [Bldg/Rm.], 401 Golden Shore, Long Beach, CA 90802, United States

☐ **Cal State LA** - Claire Smith, 5151 State University Dr, Los Angeles, CA 90032, United States

☐ **Chico-Assoc Students-BMU** - Claire Smith, [Bldg/Rm.*], 940 West 1st Street, Chico, CA 95929, United States

Results Per Page

10 ▼

How to add your Pcard to your order

1. Click on Proceed to Checkout
2. Click the pencil icon on the billing header
3. Click New Credit card
4. Enter Cardholder Name, Card Number, Card Security Code and Expiration Date
5. Click add to your credit cards
6. Give it a nickname and default
7. Save Changes

Edit Billing

Bill To

CURRENT ADDRESS

Contact Line 1Accounts Payable

Address Line 1401 Golden Shore

CityLong Beach

StateCA

Zip Code90802

CountryUnited States

☐ Add to my addresses

CSU Chancellor's Office5 - Accounts Payable, 401 Golden Shore, Long Beach, CA 90802, United States

Search additional

Results Per Page10

Credit Card Info

Select a new credit card

Select one of your credit cards

Select no credit card

New credit card

Cardholder Name

Card Number

PCARD

No credit card assigned

SAVE CHANGES

CLOSE

How to add an internal note and/or attachment

1. Click on proceed to checkout
2. Click the pencil icon on the Internal Notes and Attachments Header
3. Enter the note and save changes
4. Click ADD and upload a file or link and save changes

CSUBUY

All

Search

Requisition : 2953282

Summary

Taxes/SLH

PO Preview

Comments

Attachments

History

General

Cart Name2020-04-24 csmth 01

Descriptionno value

Prepared byClaire Smith

Prepared forClaire Smith

Shipping

Ship To

Attn: Claire Smith

Bldg/Rm:

401 Golden Shore

Long Beach, CA 90802

United States

Billing

Bill To

Accounts Payable

401 Golden Shore

Long Beach, CA 90802

United States

Delivery Options

Requested Delivery Date no value

Credit Card Info

No credit card has been assigned.

A payment must be specified

Internal Notes and Attachments

Internal Note

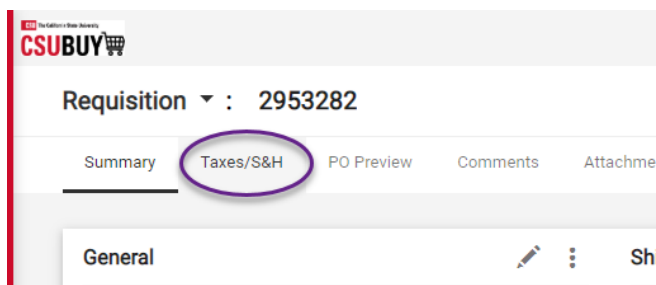
no value

Internal Attachments

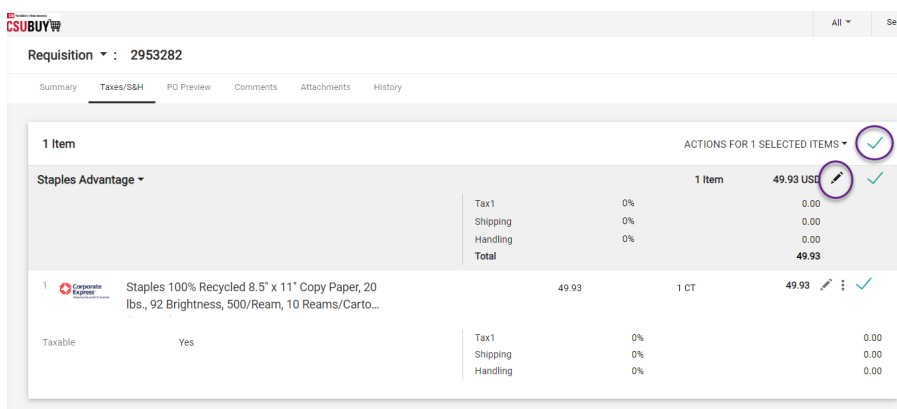
ADD

How to add tax to your order

1. Click on proceed to checkout
2. Click on Taxes/S&H tab



3. Select the first pencil icon to edit all lines or click on the pencil icon for the appropriate line
4. Enter the tax percentage
5. Click the check mark in the header to save



How to add shipping and handling to your order

1. Click on Proceed to checkout
2. Click on Taxes/S&H tab
3. Click on override
4. Select the first pencil icon to edit all lines or click on the pencil icon for the appropriate line
5. Enter % or amount
6. Click the check mark in the header to save

Requisition : 2953282

Summary Taxes/S&H PO Preview Comments Attachments History

EDIT Taxes/S&H for all lines in this group

Staples Advantage

1 Item 49.93 USD

Tax1 use default 0 %

Shipping use default 0 %

override 0.00 USD

Handling use default 0 %

per line 0.00 USD

per PO 0.00 USD

Taxable	Yes	Tax1	0%	0.00
Shipping		0%		0.00
Handling		0%		0.00

How to assign your cart to a Requester

1. Click ASSIGN CART

Shopping Cart 2020-04-24 camth 01

Simple Advanced

Search for products, suppliers, forms, part number, etc.

1 Item ACTIONS FOR 0 SELECTED ITEMS

Staples Advantage 1 Item 49.93 USD

Need to make changes? MODIFY ITEMS | VIEW ITEMS Item(s) was retrieved on: 4/24/2020 2:54:37 PM

Staples 100% Recycled 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500/Ream, 10 Reams/Carton (620014)

Staples 100% Recycled 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500/Ream, 10 Reams/Carto...

620014 49.93 1 CT 49.93

Estimate (49.93 USD)

Subtotal 49.93

Tax1 0.00

Shipping 0.00

Handling 0.00

49.93

PROCEED TO CHECKOUT

ASSIGN CART

2. Click Select if you have your favorite requesters added to your profile or click search
3. Select the appropriate requester by clicking +

User Search

Quick search

ADD FILTER

< > Page 1 of 5 1-10 of 48 Results

Name	User Name	Email	Phone
Campus Admin	admin	chris.dott@csu.edu	-
Alex Aguirre	01000222948	alaguirre@calstate.edu	-
Alex Aguirre	aaguirre	alaguirre@calstate.edu	-

10 Per Page

4. Click ASSIGN

Assign Cart: User Search
✕

Assign Cart To: Alex Aguirre
SEARCH

Add to Profile ☐

Note To Assignee:

ASSIGN
CLOSE

How to accept a cart from a Shopper (Requesters only)

1. Navigate to Shop → My Carts and Orders → View Carts → Assigned Carts or click on your actions items icon and choose Carts assigned to Me
2. Click Shopping Cart Name to activate the cart or use the Action dropdown to view, return or delete

Shop → My Carts and Orders → View Carts → Assigned Carts

Cart Management Create Cart

Draft Carts Assigned Carts

Assign Substitute Filter Assigned Carts

Type	Cart Number	Shopping Cart Name	Cart Description	Date Created	Total	Created By	Assigned To	Action
Normal	2951253	2020-04-22 01000022848 01		4/22/2020	33.96 USD	Alex Aguirre	Claire Smith	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> View Activate Return Delete </div>

How to submit your order

1. Once your cart is final, click PROCEED TO CHECKOUT

Shopping Cart 2020-04-24 cmith 01

Simple Advanced

Search for products, suppliers, forms, part number, etc.

1 Item

Staples Advantage 1 Item 49.93 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 4/24/2020 2:54:37 PM

- Staples 100% Recycled 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500/Ream, 10 Reams/Carton (020014)

1	Staples 100% Recycled 8.5" x 11" Copy Paper, 20 lbs., 92 Brightness, 500/Ream, 10 Reams/Carto...	620014	49.93	1	CT	49.93
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Estimate (49.93 USD)

Subtotal 49.93

Tax1 0.00

Shipping 0.00

Handling 0.00

49.93

PROCEED TO CHECKOUT

ASSIGN CART

2. When all required data is complete click PLACE ORDER

