

# 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.

**Requester:** Authorized to purchase directly in the CSUBUY Marketplace. A Requester is a ProCard holder.

**Shopper:** Authorized to shop and create a cart. Assigns order(s) to a Requester to complete the purchase.

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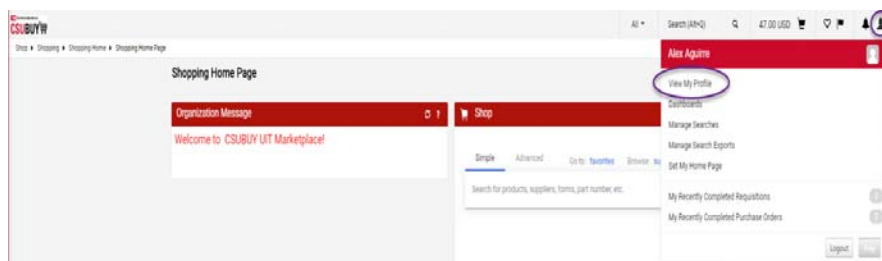
## Login URL

- o Production Environment – <https://marketplace.calstate.edu/>

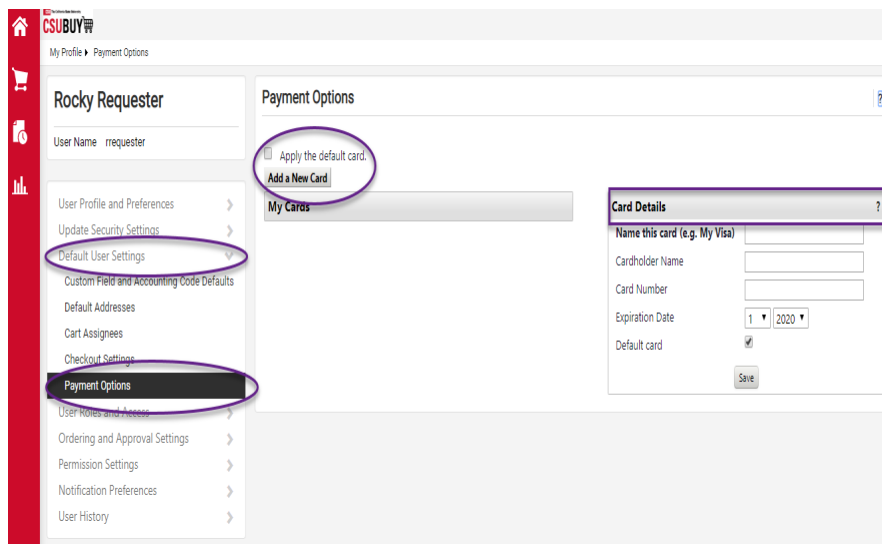
## Updating your User Profile

How to add a Pcard to your profile

1. Click on View My Profile



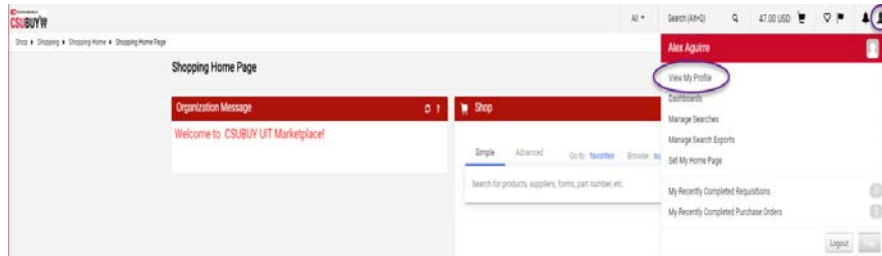
2. Navigate to Default User Settings → Payment Options



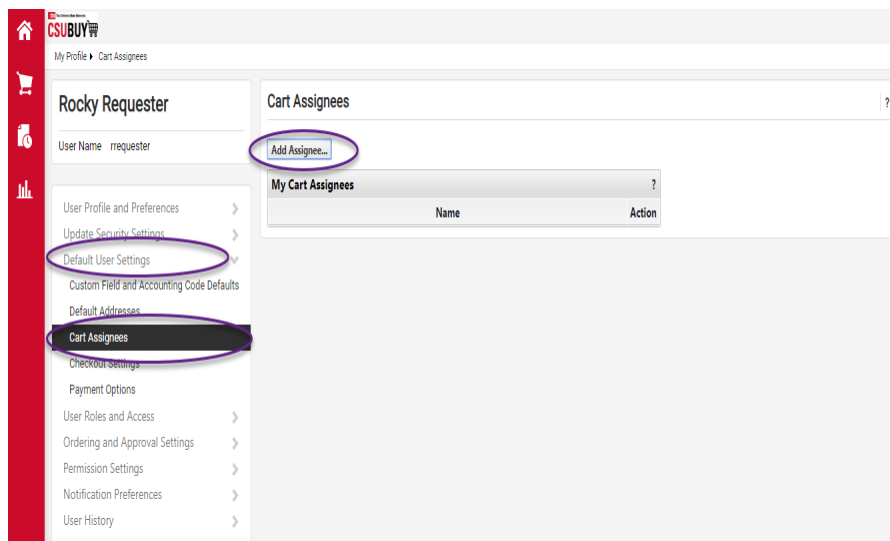
3. Click Add a New Card and enter in the Pcard details
4. To have your Pcard default in your shopping cart select “Default card”

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

1. Click on View My Profile



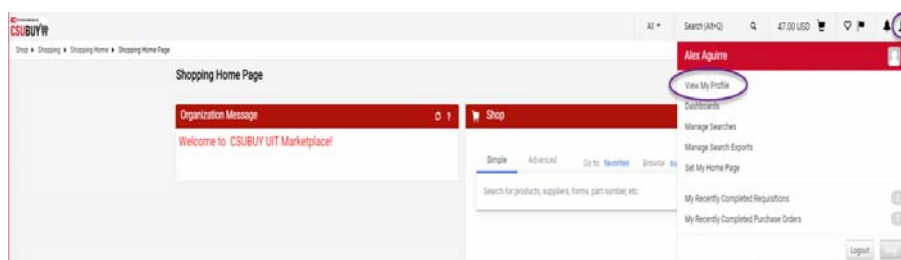
2. Navigate to Default User Settings → Cart Assignees



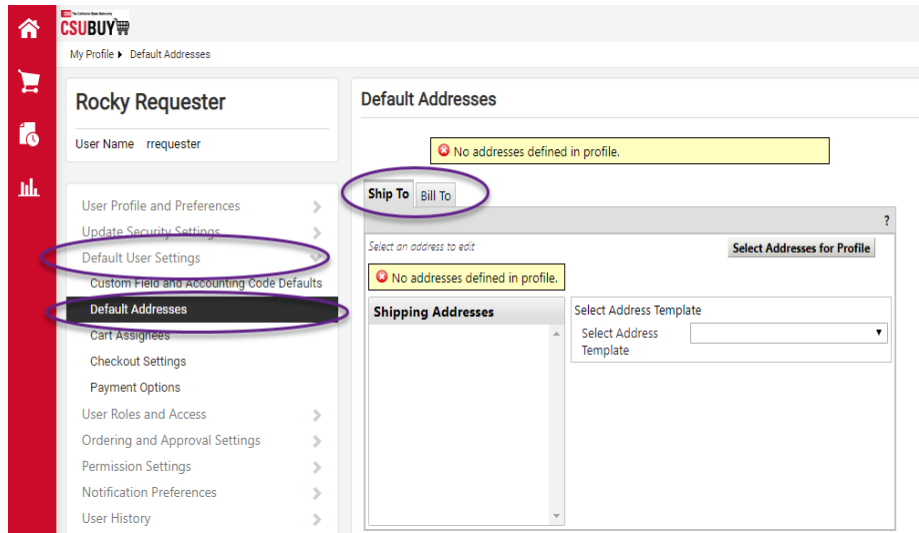
3. Click Add Assignee and search for the appropriate requester(s)
4. Multiple requesters can be added, and you can select one as preferred (default)

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

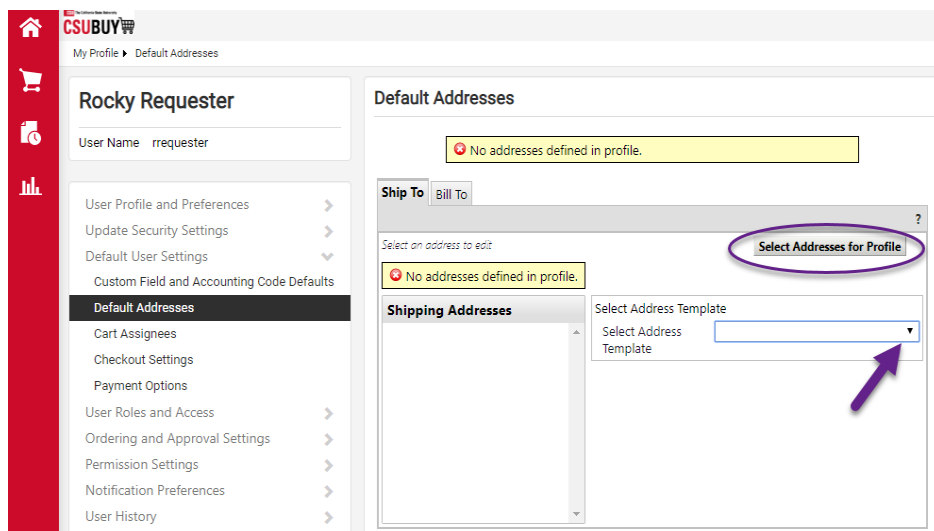
1. Click on View My Profile



2. Navigate to Default User Settings → Default Addresses



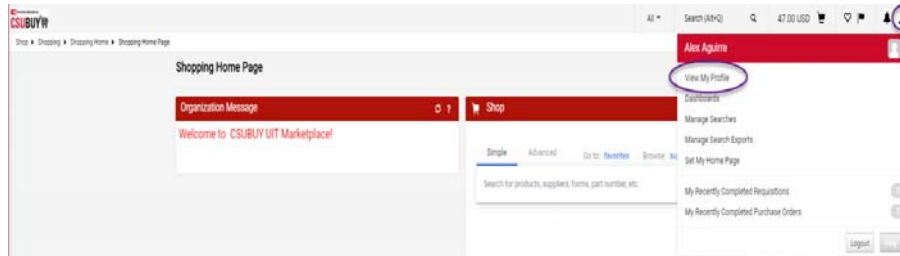
3. Click Select Addresses for Profile and choose appropriate address(es)



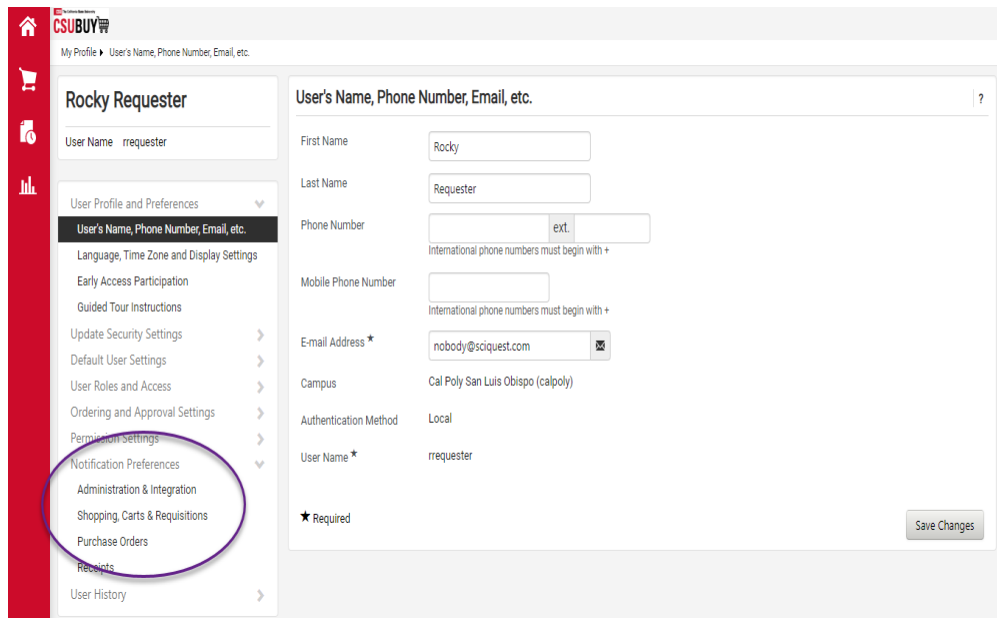
4. Choose the default box for the address you would like to default when checking out

## How to update your system notifications

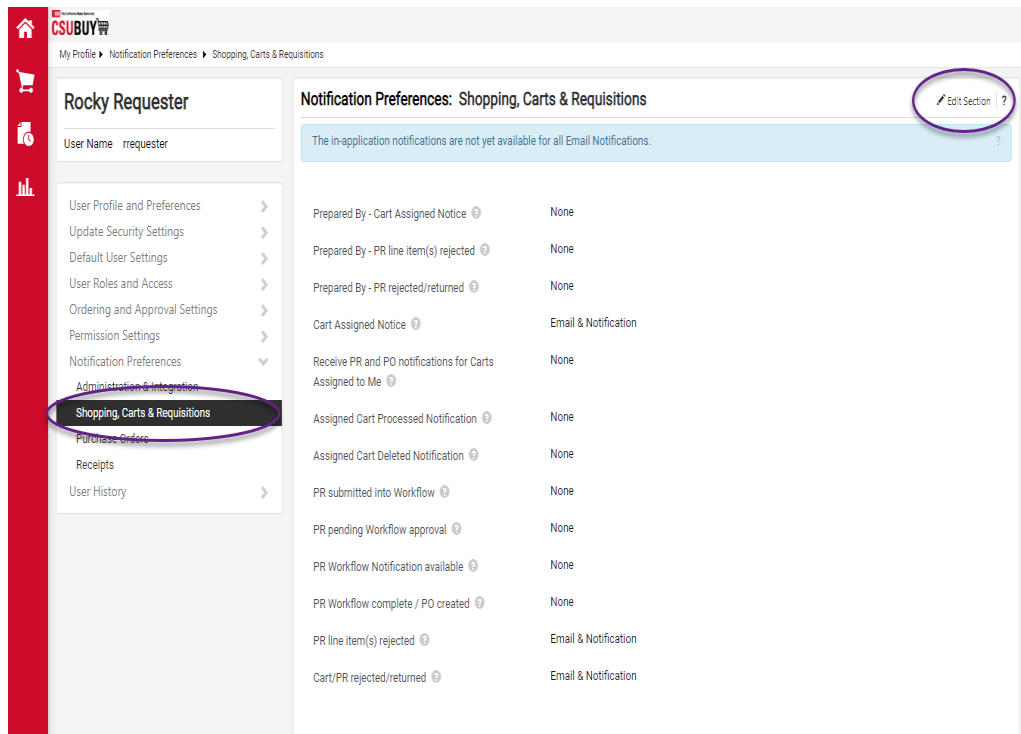
1. Click on View My Profile



2. Navigate to Notification Preferences



3. Select Shopping Carts & Requisitions/ Purchase Orders



My Profile > Notification Preferences > Shopping, Carts & Requisitions

### 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 >

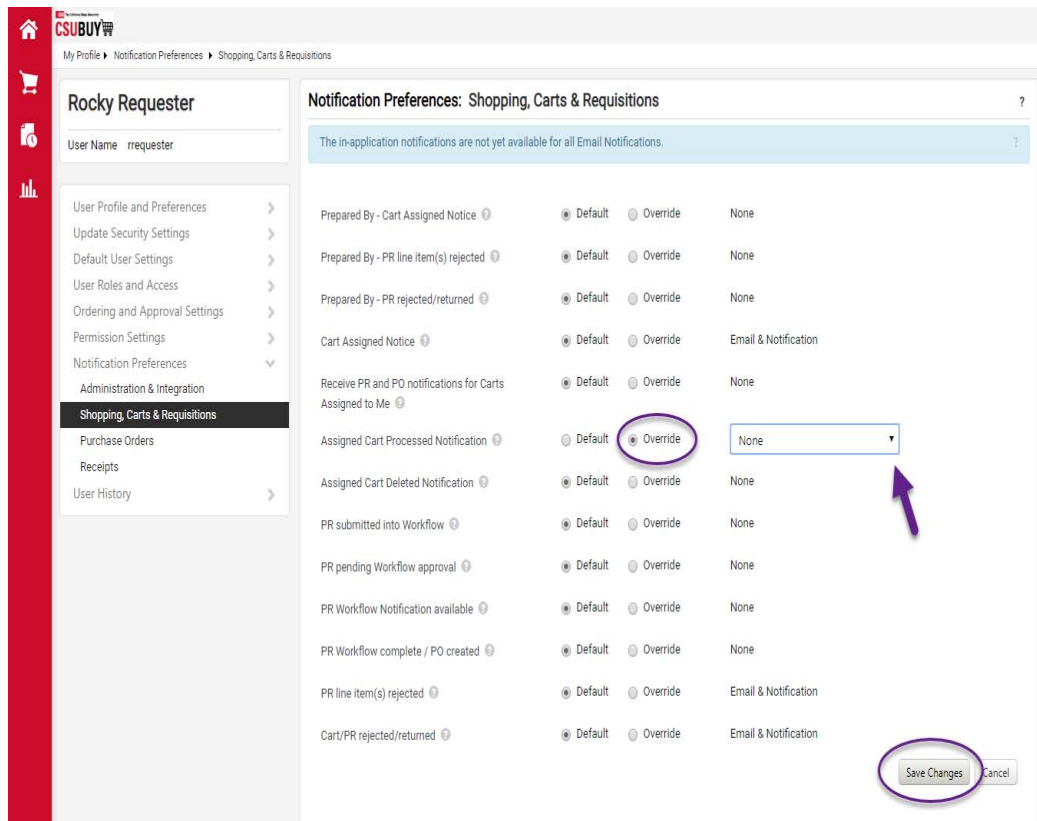
#### Notification Preferences: Shopping, Carts & Requisitions

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

[Edit Section ?](#)

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

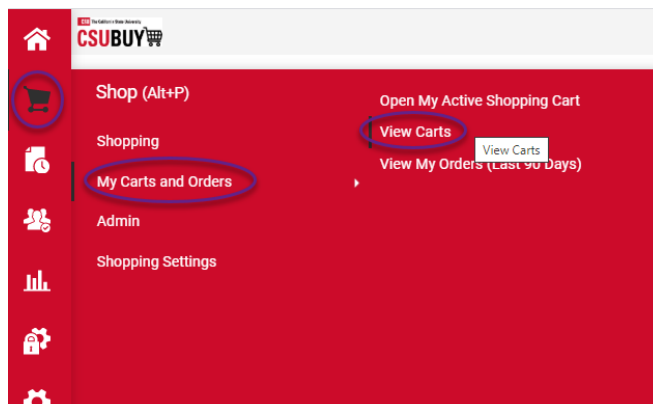


6. Select appropriate option from the dropdown
7. Click Save Changes

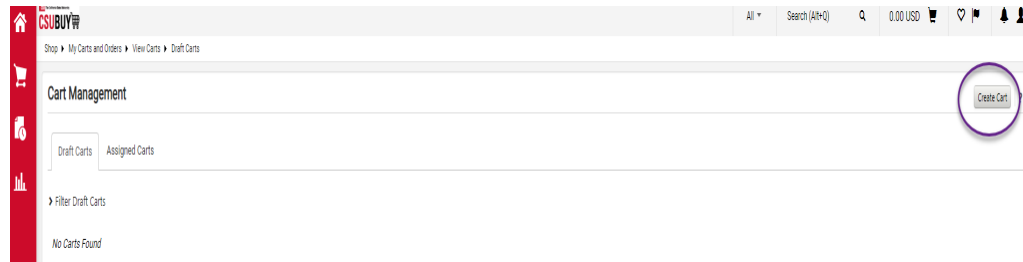
## Shopping

### How to create a cart

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

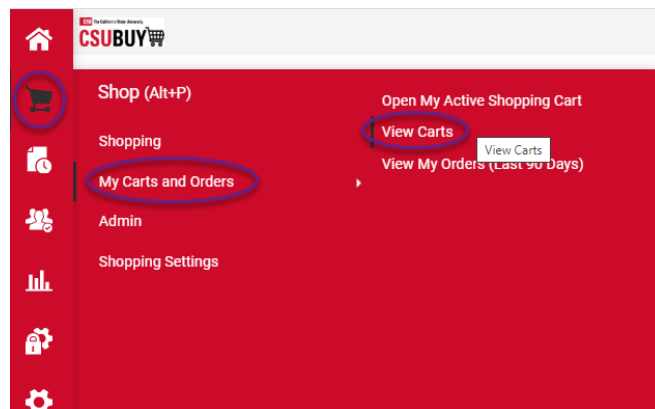


2. Click Create Cart



How to see your draft carts

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



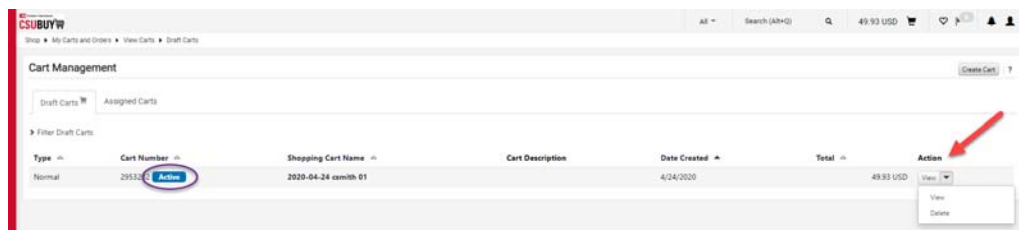
2. Click Draft Carts



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

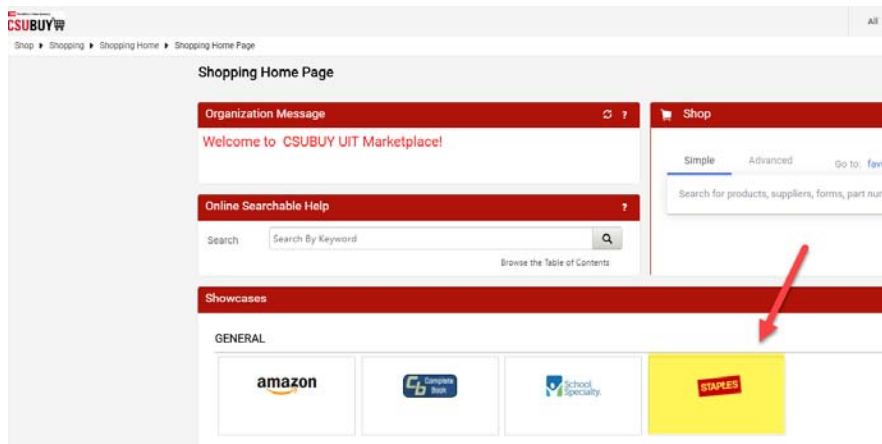
4. Select the Action Dropdown to View, Activate or Delete the cart





### 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



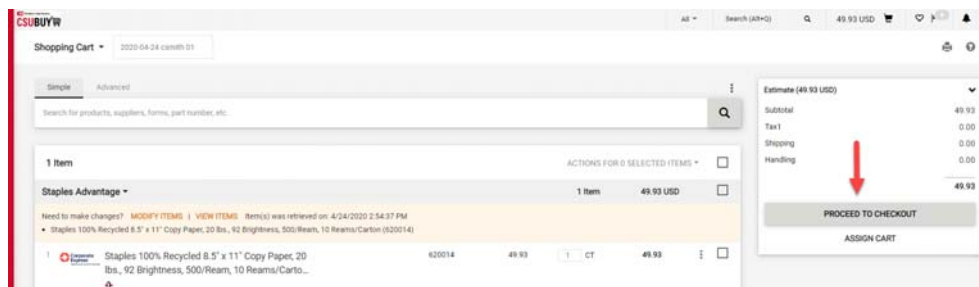
4. Click Cancel PunchOut to return to CSU BUY



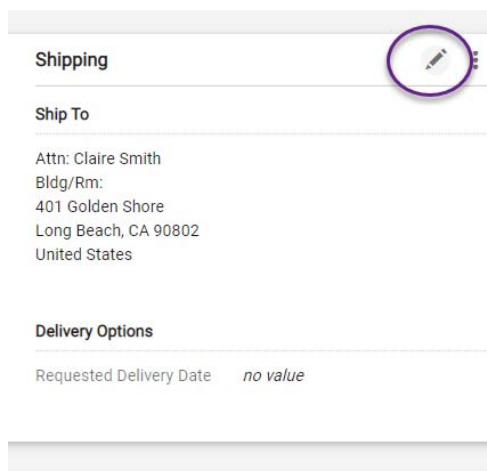
### Ordering

#### 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: *	<input type="text" value="Claire Smith"/>	<input checked="" type="checkbox"/> Add to my addresses
Bldg/Rm:	<input type="text"/>	Nickname <input type="text" value="Name this address (e)"/>
Address Line 1	401 Golden Shore	Make default <input checked="" type="checkbox"/>
City	Long Beach	
State	CA	
Zip Code	90802	
Country	United States	

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

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

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

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Search additional   Results Per Page

## 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 1	Accounts Payable	<input type="checkbox"/> Add to my addresses
Address Line 1	401 Golden Shore	
City	Long Beach	
State	CA	
Zip Code	90802	
Country	United States	

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

Results Per Page 10 ▼

**Credit Card Info**

Select a new credit card

New credit card

Cardholder Name

Card Number

Select one of your credit cards

PCARD ♥

Select no credit card

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

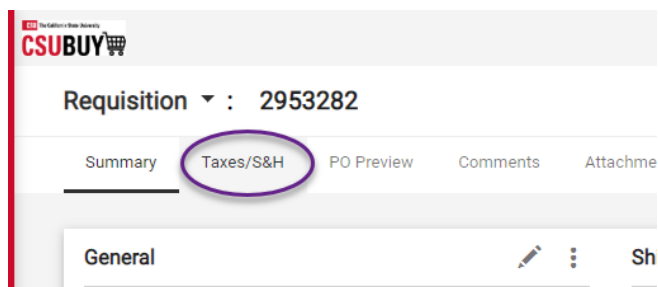
**Requisition** : 2953282

Summary Taxes/SDH PO Preview Comments Attachments History

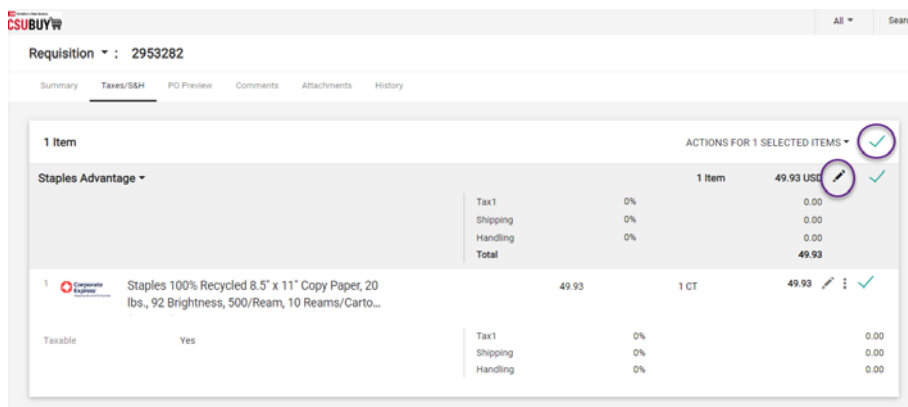
<p><b>General</b></p> <p>Cart Name: 2020-04-24 camith 01</p> <p>Description: no value</p> <p>Prepared by: Claire Smith</p> <p>Prepared for: Claire Smith</p>	<p><b>Shipping</b></p> <p>Ship To:</p> <p>Attn: Claire Smith                      Bldg/Rm: 401 Golden Shore                      Long Beach, CA 90802                      United States</p> <p>Delivery Options:</p> <p>Requested Delivery Date: no value</p>	<p><b>Billing</b></p> <p>Bill To:</p> <p>Accounts Payable                      401 Golden Shore                      Long Beach, CA 90802                      United States</p> <p>Credit Card Info:</p> <p>No credit card has been assigned.  <span style="color: red;">⚠ A payment must be specified</span></p>
<p><b>Internal Notes and Attachments</b> <span style="float: right;">✎</span></p> <p>Internal Note: no value</p> <p>Internal Attachments: ADD</p>		

### How to add tax to your order

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

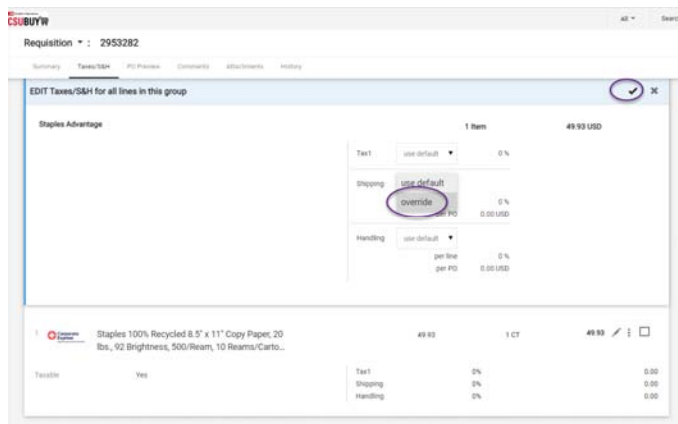


3. Select the first pencil icon to edit all lines or click on the pencil icon for the appropriate line
4. Enter the tax percentage
5. Click the check mark in the header to save



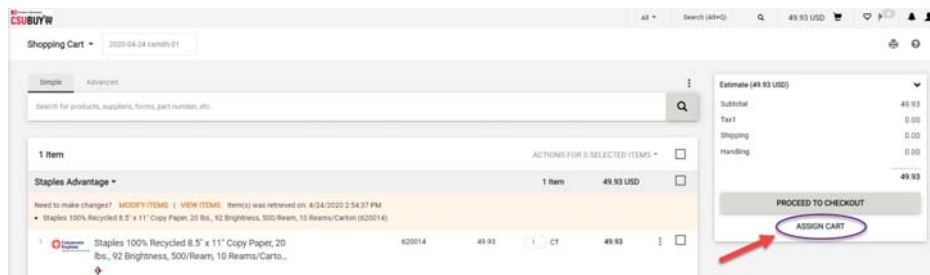
### How to add shipping and handling to your order

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

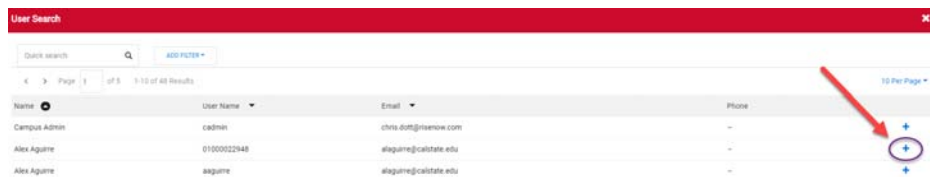


### How to assign your cart to a Requester

1. Click 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 +



4. Click ASSIGN

**Assign Cart: User Search** ✕

Assign Cart To: Alex Aguirre  
SEARCH

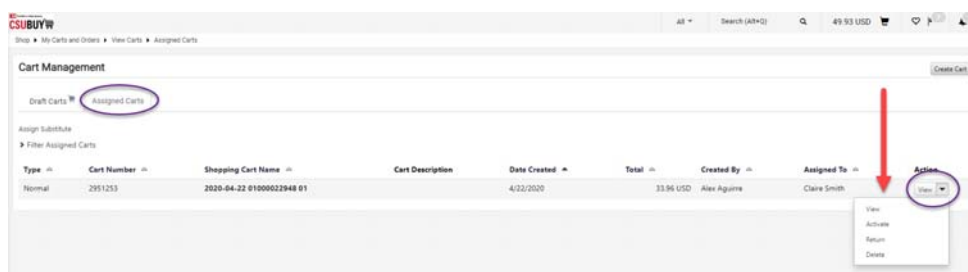
Add to Profile

Note To Assignee:

ASSIGN
CLOSE

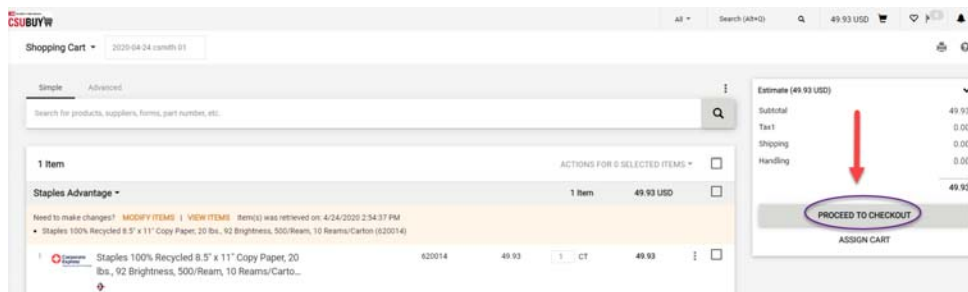
### How to accept a cart from a Shopper (Requesters only)

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

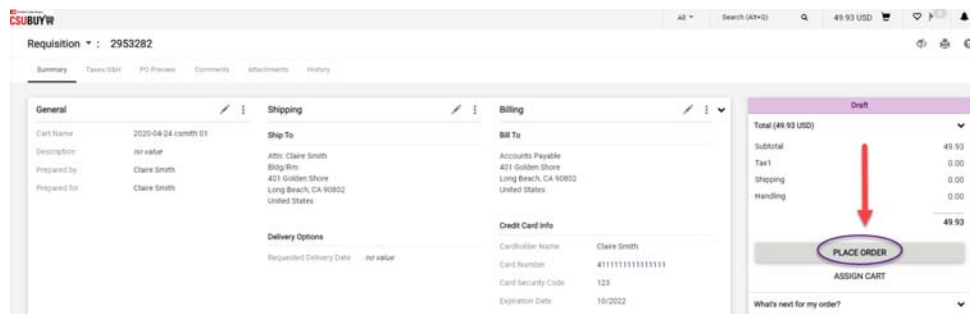


### How to submit your order

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



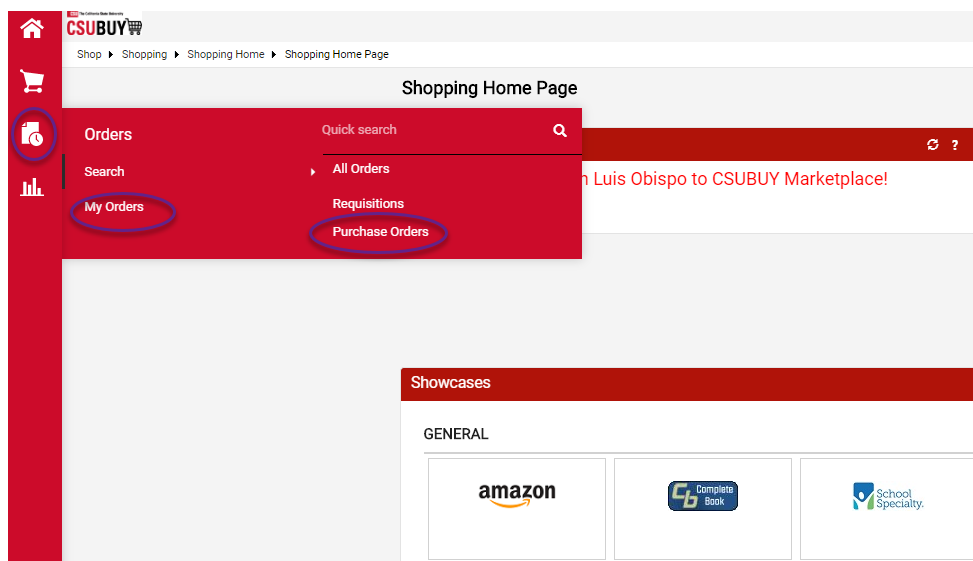
2. When all required data is complete click PLACE ORDER



## Reporting

How to access your past orders

1. Navigate to Orders → My Orders → My Purchase Orders



2. Click Add Filter to narrow your results

