E-Procurement System Tutorial

Punchout Vendors

E-Procurement is an online system which allows the user to purchase products/services from vendors.

Creating a Purchase Order – Punch-out

When purchasing from a punch-out vendor, you are sent directly to the vendor's website.

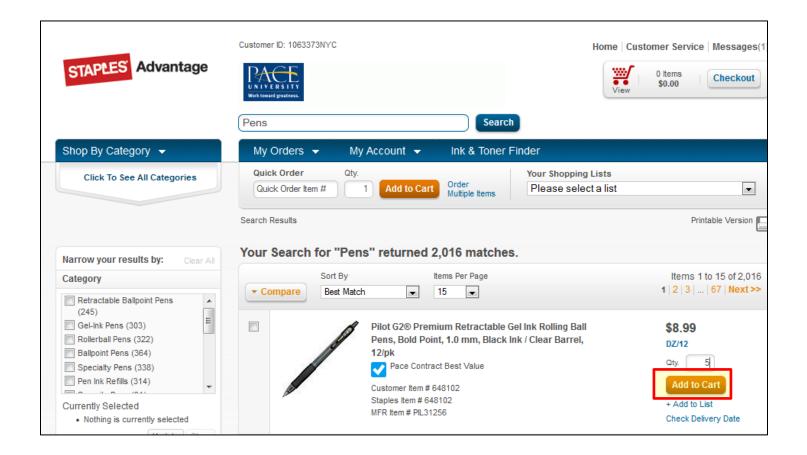
From the Home Screen, click on a Punch-out vendor to start shopping. This will bring you directly to the vendor's site.

ñ	A - Procurement Marketplace				John Test	 Action Items 1 	Notifications 🚺 🎽 9.99 USD 🔍
	UNIVERSITY Chartson Work toward greatness.						7
1		Shop Everything	•		Go		
•		Go to: advanced search favor	ites forms non-catalog form quick or	rder Browse: suppliers categories chi	emicals		
-	Welcome to Pace University's online	Showcase Links					?
	E-procurement Marketplacel	BLOG Purchasing & Contract	UsBank UsBank	Vendor Management System			
	Sharpsmart Daniels Sharpsmart provides pickup and disposal for regulated medical waste	Showcase Services					1
	(RDM). In addition to RDM. Daniels also provides service for sharps wate which includes needles, synges, coalpels. Droken glass and other items capable of penetrating and damaging skin.	Chartwells Dining Services	Florist Order Form - New York	Daniels Sharpsmart Form	Non- Catalog Form	RFX Request Form	Sole Source Order Form
	Daniels is a specialized service for departments such as Biology, Nursing, athletics and other laboratories. If you have kens that require this method of specialized pickup please contact Purchasing and Contracts (2044) or Daniels International (25:246-980002) to	TMP Worldwide					
	find out if Daniels is the appropriate vendor. We are working diligently to build our e-Procurement Marketplace	Showcase Suppliers					7
	to include the products and services used most, to provide you with vendors, forms and catalogs that will allow you to place orders easier and quicker, and leverage renegotated contracts that are most favorable financiall and sustainably.	crystal rock Crystal Rock New York City	<mark>crystal rock</mark> Crystal Rock Westchester	Car Rental	Staples Cartridge Recycling	TRAFTL CLAID toward	
	Purchasing	Punch-out					1
	Purchasing Resources:	BH	COWO	CARQLINA	DOLL	Elanartifie	GanCistraction conservation Matching
90	Tax Exemption Certificate Request Form PO Change Order Form Pace Durchaing Website Vendor Request Form Contrast Administration	moremedical	mooremedical Austrituteita dan	STAPLES	YWR		
	 Same dia manificistration 						

> Search for desired items on the vendors site.

STAPLES Advantage	Customer ID: 1063373NYC	Home Customer Service Messages(1)
	Pens black pens	Search
Shop By Category 👻	blue pens	: & Toner Finder
Ink & Toner Finder	red pens	Your Shopping Lists
Apple® •	del pens	er ple items Please select a list ▼
Boards Easels Dry-Erase	pilot pens	
Calendars Planners	papermate pens	
Cleaning Maintenance	inkpens	zation »
Coffee Water Snacks	uniball pens sharpie pens	

> Change the desired quantity and click Add to Cart.



Click Checkout in the top right of the screen



Adjust items in your cart as necessary, then click Submit to bring items back into the Pace E-Procurement system for processing.

Your Sh	nopping Cart : Review Item Information				
	Sort Ple	t By ease select	×		
			View all delivery dates	ltem Total	Remove an Item
	 Pilot G2® Premium Retractable Gel Ink Rolling Ball Pens, Bold Point, 1.0 mm, Black Ink / Clear Barrel, 12/pk Pace Contract Best Value Customer Item # 648102 Staples Item # 648102 MFR Item # PIL31256 Packing Slip Note: 		\$8.99 DZ/12 Check Delivery Date	\$44.95	
			View all delivery dates	ltem Total	Remove an Item
		t By ease select	•		
			Order Summary		
			Subtotal: Total:	\$44.95 \$44.95	
			Continue shopping	Clear cart Update cart	Submit

- ✓ If there are additional items that need to be added to the cart, click the **shopping cart** on the left of the screen. Multiple items can be added from as many vendors as desired to the cart. This can be done for hosted and non-catalog vendors as well.
- ✓ If there are items you want to remove from your cart, select the items to be removed by clicking the select box located to the far right of the line item. Click the drop-down menu that reads **Perform and action on**. Click **Remove Selected Items**. Click **Go**.

Continue Shopping	2 Item(s) for a total of 55.44 Use			
	Proceed to Checko	ut pr	Assign Car	
🚔 🗿 Help Empty cart	Perform an action on (1 item	s selected)	▼ Select	
🚔 🗿 Help Empty cart	Perform an action on (1 item Unit Price	s selected) Quantity	✓ Select / Total	
🚔 😳 Help Empty cart				

> Once all desired items are in your cart, click **Proceed to Checkout.**

Final Review

Verify all the information (Ship To, Bill To, FOAPAL Values etc.) is correct before sending the information to the vendor. In this section, the user has the ability to edit the entire document, or each line item individually.

ñ	UNIVERSITY e-Procurement Marketplace (Test Site) Work toward greatness.
	Shop My Carts and Orders Open My Active Shopping Cart 🗢 Summary - 1067141 - Future Requisition
	🥏 General 🥪 Internal Info 🥥 Supplier Info 🔗 Ship To 🥪 Bill To 🥪 FOAPAL Values 📿 Final Review

To adjust the Summary information, click Edit (located in the upper right of the corresponding box) for the particular section which needs adjusting. After changes have been made, click Save.

ñ	PACE .	-Procurement Marketplace				John Test 🔻 🔺 Action It	ems Notifications	🐂 10.00 USD 🔍
1	W Shop My Carts and Orders	s Open My Active Shopping Cart 🗢 Summary 106714	1 - Future Regulation				-	
•	🮯 General 🧐 Internal Int	fo 🔗 Supplier Info 🔗 Ship To 🔗 Bill To 🤗	TOAPAL Values 📿 Final Review					
								Assign Cart
		[a				Ret	urn to shopping cart	t 🕚 Continue Shopping
		Once you have reviewed the details, you n	en completed and this request is ready to be s ay continue by clicking the button at the top o					
	Requisition PR Approvals	PO Preview Comments Attachments History						
		Bill To FOAPAL Values Supplier Info						a ?
	Hide header							Hide value descriptions
		General		Internal Info		Supplier Info		
	Cart Name	2013-12-05 jtest0000 02	edit. I ternal Note		edit lote to all Suppliers			edit
	Priority Description	Normal	add attachments		Accounting Date Attachments for all supplier	TTL PILLE		
	Prepared by	John Test	and anadoment		add attachment.			
	Prepared for	John Test						
		Ship Te		1/91	BIU T	٥		
	Ship To			edit III To				edit
	Attention to: +1 (914) 111-2222 jtest0000@pace.edu TEAD HOUSE 235 ELM ROAD TED BRIARCLIFF MANOR, NY 1053			ace University Accounts Payable Department PO Box 2500 Briardiff Manor, NY 10510-0352 United States				
	United States							View/edit by line item
	Delivery Options			edR				
00	Expedite	×						
00	Ship Via	llest Carrier-Best Wa	y .					
- 24	Delivery Date	its without						

To adjust any FOAPAL Value information, click Edit (located in the upper right of the corresponding box) to modify any values listed. After changes have been made, click Save.

	View/ed	dit by line item		
		FOAPAL Values		
FOAPAL Values Index	Account	Commodity Code	Chart	edit
FA040 Financial Information Systems	E18401 Print Promo Alumni News	10000723 10000723-test	1 Pace University	
				Versional Inc. See Service

To adjust Supplier/Line Item Details, click Edit (located in the upper right of the corresponding box) for the particular item which needs adjusting. After changes have been made, click Save.

Supplier / Line Item Details								?
Hide line details					For selec	ted line items Add T	o Favorites	• Go
Chartwells Dining Service Law School more info			PO Number Customer Account # Pricing/Discount Code		To Be Assig the value	ned	View/ed	edit
Product Description		Catalog No	Size / Pac	ckaging	Unit Price	Quantity	Ext. Price	_
1 tet	Internal Note Requisition Type Internal Attachments add attachment	test no notiv Hosted/Punchout/Non-Catalog Item Hosted/Punchout/Non-Catalog Item	m At	ternal Note ttachments for supp add attachment	10.00	1 EA	10.00 USD	edit
				Su	upplier subtotal		10.00USD	
					Subtotal Total		10.00 10.00	

> Once all edits have been completed, click **Place Order**.

ñ		Procurement Marketiplace Unstand Work toward greatness,	John Test 🔻	🖈 Acti	on Items Notification	is 🐂 10.00 USD 🔍
1	H Shop My Carts and Orders	Open My Active Shopping Cart 🗢 Summary - 1007141 - Future Requisition				
		🗇 Supplier Info 🔗 Ship To 🔗 Bill To 🔗 FOAPAL Values 🔗 Total Review				Place Order
	🤡 General 🥁 Internal Info					Assign Cart
				3	Return to shopping ca	rt 🕑 Continue Shopping
		All done! The required information has been completed and this request is ready to be submitted.				
		Once you have reviewed the details, you may continue by clicking the button at the top of the page.				

*The user will receive a **requisition number** and a confirming email.

Congratulations! You have succes	sfully submitted your request. If you need to view or print a copy, click Quick View 🗟 or view its sta	atus on the Approvals Tab.
-		
lere is a summary of the requisition. You ca	n also retrieve this requisition at any time via the document history search page.	
Requisition number	1067141 view	
Requisition status	Pending	
Cart name	2013-12-05 jtest0000 02	
Requisition date	12/11/2013	
Requisition total	10.00 USD	
Number of line items	1	
Vhat would you like to do next? Here are lir	iks to some common actions.	
 Search for another item 		
View order history		
 Check the status of an order Return to your home page 		

Viewing the Requisition status:

> Click the **requisition number** to view the status of the order placed.

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.					
Requisition number	1067141 view				
Requisition status	Pending				
Cart name	2013-12-05 jtest0000 02				
Requisition date	12/11/2013				
Requisition total	10.00 USD				
Number of line items	1				

> Click the **PR Approvals** tab to view the status of your requisition.

	e-Procurement /	Marketplace	7700			Dave Taylor 🔻	🖈 Action Items 1203 Notifications 41 📱 (0.00 USD 🔍 🔍
	Document Search Docus	ments 🗢 🛛 Approvals - Requisition	n 1067799					
• Return to Search Re	sults				4 of 2177 results		Requisition Number(s)	1067790 •
Requisition PR Approv	als Comments Attachments H	listory					Available Actions: Add Comment	• Go
Orientation: Horizontal	- Banner Budget Check Completed ✓ ✓ System	Capital_Approval Approved ✓ ✓ Dave Taylor	Create PO Completed ✓	Completed 12/6/2013 5:18 PM				

> Click the **History** tab to view details of the requisition workflow.

PAC	e-Procurement Marketplace					Dave Taylor 🔻 🔺 Action Items 🔝 Notifications 🖪 🎽 0.00 USD						
		nent Search Search Do	cuments & History - Rec	painteen 1067790								
• Return to	Return to Search Results				Requisition Number(s) 1067790							
Requisition	PR Approvals Cor	mments Attachme ts	History							Available Actions:	Add Comment	•
① Click to	o filter history				7							Export CS
Results per	Results per page 20 *				Records found: 9					+ Page	1 of 1 🛌	
Line No	- Date/Time *	• User	4	Step(s)		Action	<u>م</u>	Field Name	۵	From	То	Note
	12/6/2013 5:18 PM	System			Requisition approval process	s completed						
	12/6/2013 5:18 PM	System	Create PO		PO Created		PO#: 1	6612005				
	12/6/2013 5:18 PM	Dave Taylor	Capital_Approval		Requisition approved							
	12/6/2013 5:18 PM	Dave Taylor	Capital_Approval		Requisition assigned							
	12/6/2013 5:17 PM	System	Banner Budget C	heck	Requisition approved							
	12/6/2013 5:17 PM	Dave Taylor			Requisition submitted							
	12/6/2013 5:17 PM	Dave Taylor			Line removed		458110	0				
Line 1	12/6/2013 5:16 PM	Dave Taylor			New Line added		458110	,	Punch-out			
	12/6/2013 5:15 PM	Dave Taylor			Requisition Copied				Requisition 106	7806		
Daculte nar	page 20 ·										. P	age 1 of 1

> Click the **Requisition** tab and scroll to the bottom right to retrieve the **Purchase Order Number**.

ñ	PACE	e-Procurement Marketp					Dave Taylor	🖈 Actio	n Items 1.201 Notification	ns 🚺 🎽 0.1	00 USD C
	Expedite Ship Via Delivery Date		K lest Carrier-Best Way								
<u>h.</u>				View/edit by line its	m						4
6 3	ansex			Account		Commodity Code			Chart		
٥	Fir	FA040 EE1801 Cial Information Systems (FIS) Cap Bud Fature Floor Covering			150 Builder's Supplies			1 Pace University			
	Supplier / Line Item D	anta II e								View/edit	t by line item. ?
	Hide line details				_			For selected li	ne items Add To Favorites		Go
	Staples more info				1	PO Number		P0128653			
	where the second to white and one	was retrieved from the supplier's website. Wh				Pricing/Discount Code		20) illin		View/edit b	y line item
		was recreated from the supplier's website. What o is this item(s) on the supplier's website. What o									
	Product De	escription			Catalog No	Size / S	Packaging	Unit Price	Quantity	Ext. Price	23
	1 ✓ Ziploc Doul Manufactur Manufactur	ble-Zipper Bags, 1 Gallon, 1 3/4 mil., Clear,	11 H x 10 1/2 W, 250/Ct () n Diversey, Inc. 94602	nore info Internal Note Requisition Type Internal Attachments	455110 FO meter Hosted/Punchout/Non-Catalog Re Hosted/Punchout/Non-Catalog Re	Item	CT Supplier Attn To: External Note Attachments for supplier	45,44		45.44 USD	E
						Supplier subtotal				45.44USD	
-							Subtotal Total			45.44 45.44 USD	