



U Shop
MARKETPLACE

Contents

- PROCESS OVERVIEW4**
- ROLES & CART STATUS VS REQUISITION STATUS.....5**
- TRAINING & AMAZON SET UP6**
 - SHOPPER & REQUISITIONER TRAINING 6
 - Shopper Training* 6
 - Requisitioner Training*..... 6
 - AMAZON SET UP 6
 - Amazon Set up Training*..... 6
 - GFA Information* 6
 - GFA Set up* 6
- PROFILE & DEFAULTS SET UP7**
 - REQUIRED FOR AMAZON..... 7
 - OPTIONAL DEFAULT SETTINGS 7
 - Custom Field & Accounting Codes – Multiple Shortcuts can be added* 7
 - Default Address(s) – Multiple Addresses can be added*..... 7
 - Cart Assignee* 7
- SHOP7**
- PROCEED TO CHECKOUT - REQUIRED FIELDS8**
- PROCEED TO CHECKOUT - OPTIONS10**
- ASSIGN OR SUBMIT REQUISITION11**
- WHERE IS MY ORDER?.....12**
 - PO (PURCHASE ORDER) 12
 - ORDER TRACKING..... 13
 - Punch-Out Order*..... 13
 - Purchase Request or Quick Order* 13
- PO CHANGE ORDER.....14**
- INVOICE.....15**
 - INVOICE PAYMENT DETAIL 16
- HOW TO CLOSE A PO IN USHOP17**
- ASSIGNED CARTS AND/OR APPROVALS18**
 - WHERE TO FIND WHAT TO REVIEW AND/OR APPROVE 18

FIND CARTS ASSIGNED TO ME	18
MANAGER TOOLS.....	19
VIEW OTHERS DRAFT CARTS	19
MANAGER TOOLS CONTINUED.....	20
ROLE SEARCH	20
SEARCHING AND REPORTING	21
SEARCH HELP	21
REPORTING:.....	21
TOP TIPS/TRICKS	22
COPY A REQUISITION TO A NEW CART	22
WHERE IS MY CART / WHAT'S IN MY CART.....	22
USHOP ONLY GFA	22
I'M GETTING TOO MANY EMAILS. HOW TO CHANGE NOTIFICATION PREFERENCES.....	22
HOW TO CHANGE MY EMAIL ADDRESS FOR USHOP.....	22
HOW TO CREATE A REPLACEMENT PO	22
HOW TO ASSIGN A SUBSTITUTE	23
HOW TO END THE SUBSTITUTION	24
ORDERS/PAYMENTS WITH FOREIGN SUPPLIERS	25

Order & Payment States

Process Overview

CART

SHOP

Select what you want to buy utilizing:

- Punch-out catalogs
- And / or
- Forms



This is the equivalent of adding item(s) into a shopping cart.

CHECK-OUT

Proceed to Checkout:

- Delivery Address?
- How will it be paid for?
- Etc.



This is the equivalent of checking out at the store. (will this order be delivered/how to pay, etc)

REQUISITION

SUBMIT

Submit Requisition

- Routes for GFA (financial approval)
- OtherWorkflow steps



Start of requisition workflow (This is now a requisition and is no longer a cart)

ORDER

PO

PO is created by UShop and sent to the supplier.



PO is sent to the supplier in one of the following ways:

- Emailed by UShop
- Faxed by Ushop
- MAN — manual distribution (you are responsible get the PO to the supplier)

RECEIVED

Order is received



Order is received. Verify order for accuracy.

PAYMENT

INVOICE

Invoice sent to the University



Invoice:

- Should be sent by the supplier directly to Accounts Payable
- If the supplier sends the invoice to you email the invoice to ap@admin.utah.edu and reference the PO to pay against

PAYMENT

Payment is made to the supplier

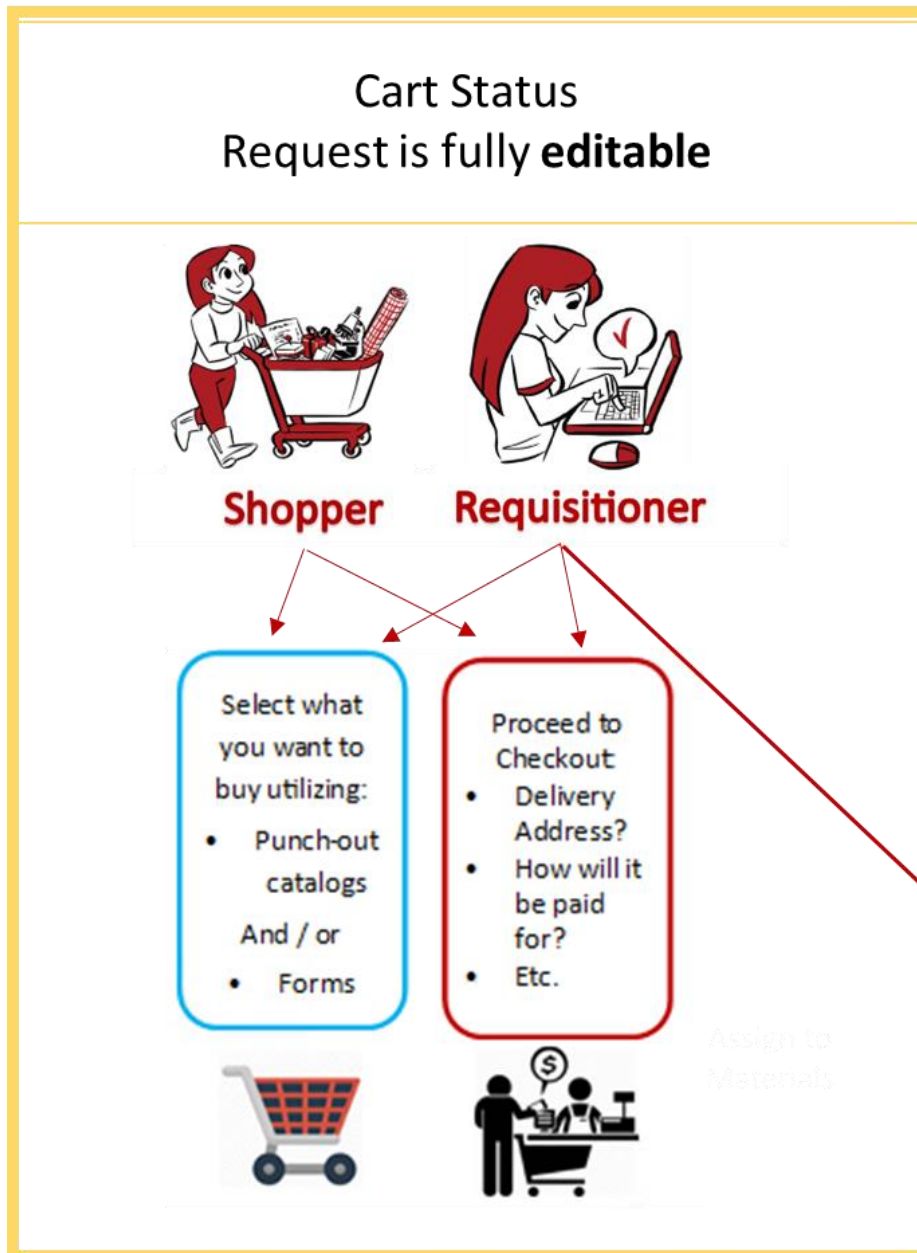


Accounts Payable will pay the supplier

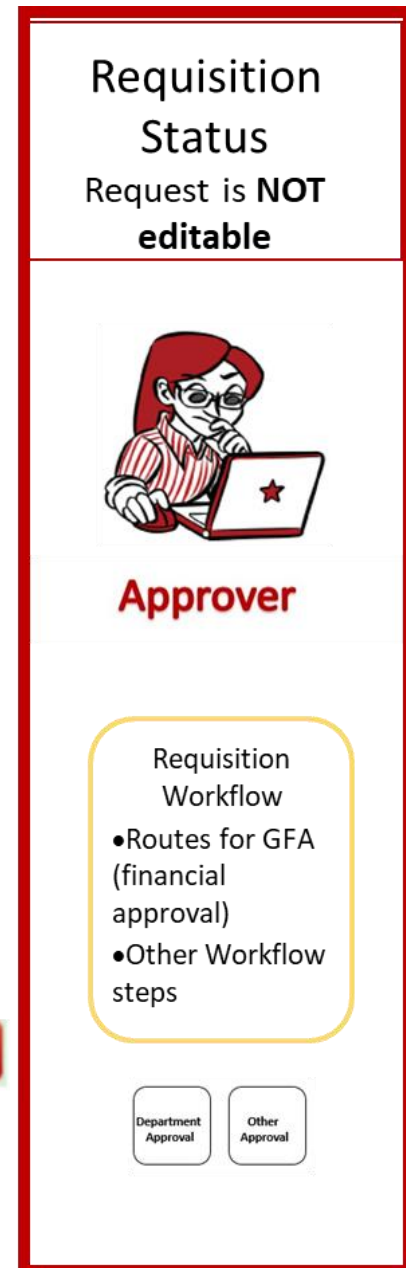
Roles & Cart Status vs Requisition Status

Roles & Decision for routing

Editable status vs **non-editable** status



Submit Requisition



Training & Amazon Set up



Shopper & Requisitioner Training

[Shopper Training](#)

[Requisitioner Training](#)

Amazon Set up

[Amazon Set up Training](#)

GFA (*Note: GFA imports updated financial authority into UShop nightly*)

GFA [Information](#)

GFA [Set up](#)

Profile & Defaults Set up



Required for Amazon

Required Amazon Checkout Default on [Amazon First order](#):

Optional Default Settings

Custom Field & **Accounting** Codes – **Multiple Shortcuts can be added**

- Acct Dist **Shortcut** = **Activity** or **Project**
- Account code
- A/U = 1 or 0 for **Activity** OR = blank for **Project**
- [Accounting Default \(Add Favorite\)](#)

Default Address(s) – **Multiple Addresses can be added**

- Add Dept [Default Address](#)

Cart [Assignee](#)

Shop

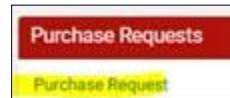
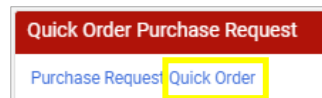
Overview of how to process a transaction in UShop

1. Choose what to purchase or shop for using

- [Punch-out](#) Catalogs
 - And /or
- Forms



NOTE: Type **New Supplier** if your supplier is not yet in UShop on the Purchase Request form



2. When shopping is complete, click on the cart Icon



3. Name the Cart: Whatever helps you or department naming convention

4. Click Proceed to Checkout



Proceed to Checkout - Required Fields



*Required Fields = Shipping & Accounting Distribution (if filled by default move to the next section)

Requisition ▾ : 3186240

Summary PO Preview **Comments** Attachments History

General Information		Ship To / Billing Options	Notes/Attachments & Add'l Approvals
Cart Name	HH New UX	Ship To	External Notes and Attachments
Description	<i>no value</i>	ATTN: HEATHER HOLLEY PURCHASING 201 PRESIDENTS CIR RM 170 SALT LAKE CITY, UT 84112 United States	Note to all Suppliers <i>no value</i>
Requisitioner	HEATHER M HOLLEY		Attachments for all suppliers Add
Shopper	HEATHER M HOLLEY	Billing Options	Internal Notes and Attachments
Department Custom Fields			Add Additional Approvals Below

Accounting Distribution

Acct Dist Shortcut	BU	Org	Fund	Activity	Project	Account	A/U
Activity or Project	Shortcut auto fills these fields					Ex: 62500 for Office supplies	Activity = 1 or 0 Project = Blank

Item

- Review OR Edit
- 1- Review **what** is being purchased
 - 2- **Ship To** – ensure the order will go to the correct destination
 - 3- **Accounting Distribution** – What activity(s) and/or project(s) will pay for this order
 - 4- **Comments** – Review for instructions/help

Proceed to Checkout - Options



Requisition : 3186240

Summary PO Preview **Comments** Attachments History

General Information	Ship To / Billing Options	Notes/Attachments & Add'l Approvals
Cart Name HH New UX Description <i>no value</i> Requisitioner HEATHER M HOLLEY Shopper HEATHER M HOLLEY Department Custom Fields	Ship To ATTN: HEATHER HOLLEY PURCHASING 201 PRESIDENTS CIR RM 170 SALT LAKE CITY, UT 84112 United States Billing Options	External Notes and Attachments Note to all Suppliers <i>no value</i> Attachments for all suppliers Add Internal Notes and Attachments Add Additional Approvals Below

Billing Options

Accounting Date mm/dd/yyyy

Ship Via

Hold for Invoice Approval

Handling Code Override

Separate Payment Override

Payment Message

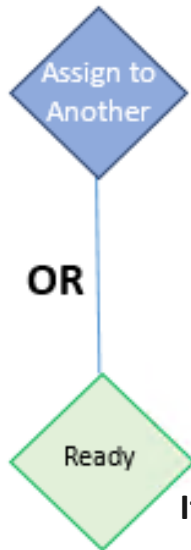
Require exact PO-to-Invoice Match

Prevent Automatic PO distribution. Check box to manually distribute PO.

EXTERNAL NOTES & ATTACHMENTS:
Go to the supplier with the PO

Add Additional Approvals Below:
Shopper/Requisitioner adds up to 5 additional Ushop users to view and approve the requisition prior to Departmental Approval

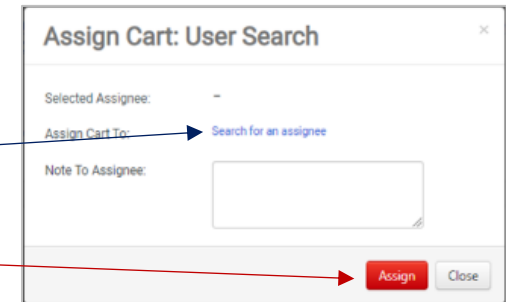
Assign OR Submit Requisition



If the requisition will need review or changes made by someone else

Then Assign to appropriate person

1. Click on Assign Cart
 - Select from Defaults (or add New Assignee)
2. Click Assign



If the requisition is ready to proceed to GFA (financial approval)

Then click Submit Requisition



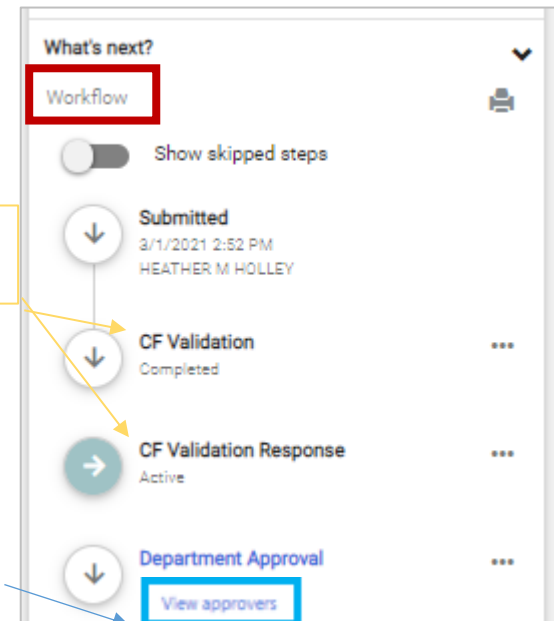
☐ This transaction is now in **Requisition Workflow**

☐ See where your order is at any time in Workflow

○ To view who can approve any workflow step click On:

○ **View approvers**

○ This will show **who can approve** this order for each workflow step



Where is my order?



PO (Purchase Order)

- Once all Workflow steps are complete the system will create a Purchase Order (PO)
- Click Purchase Order number to see the PO

Completed	
Total (99.00 USD)	▼
Subtotal	99.00
	<hr/>
	99.00
Related Documents ▼	
Purchase Order: UO00002874	🖨️

- Look in the Supplier/Distribution Information Section for the PO Distribution Methods.

Supplier / Distribution Information

Distribution Methods

Distribution Date/Time
3/2/2021 10:47 AM

The system will distribute purchase orders using the method(s) indicated below:

Email (HTML Attachment)

Email the order was sent to

See Order Details:

- **Date & time** the PO was Created
- **How** the PO was sent to the supplier
- **Where** the PO was sent



Need to [Save](#) or [Print](#) the PO?

Order Tracking



Punch-Out Order



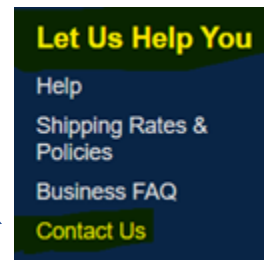
- [Amazon](#) - begin by following the helps in this [link](#) and look for the following tools:





- Selecting **“Track Package”** will show when the package was or will be delivered and by which carrier.
- **“Return or replace items”** should provide a communication method with Amazon to help fix/resolve the issue
- If Return or replace is unsuccessful click **“Get Product Support”** this will allow you to call, email or chat with Amazon support. They may ask for a number ending in “71”. The phone number is 801-581-8671

- ◆ For online Chat assistance scroll to the bottom of the Punch-out and click on Contact Us. This will open an online chat feature.

- Guides for **Tracking your order in most other [Punch-outs](#)**.



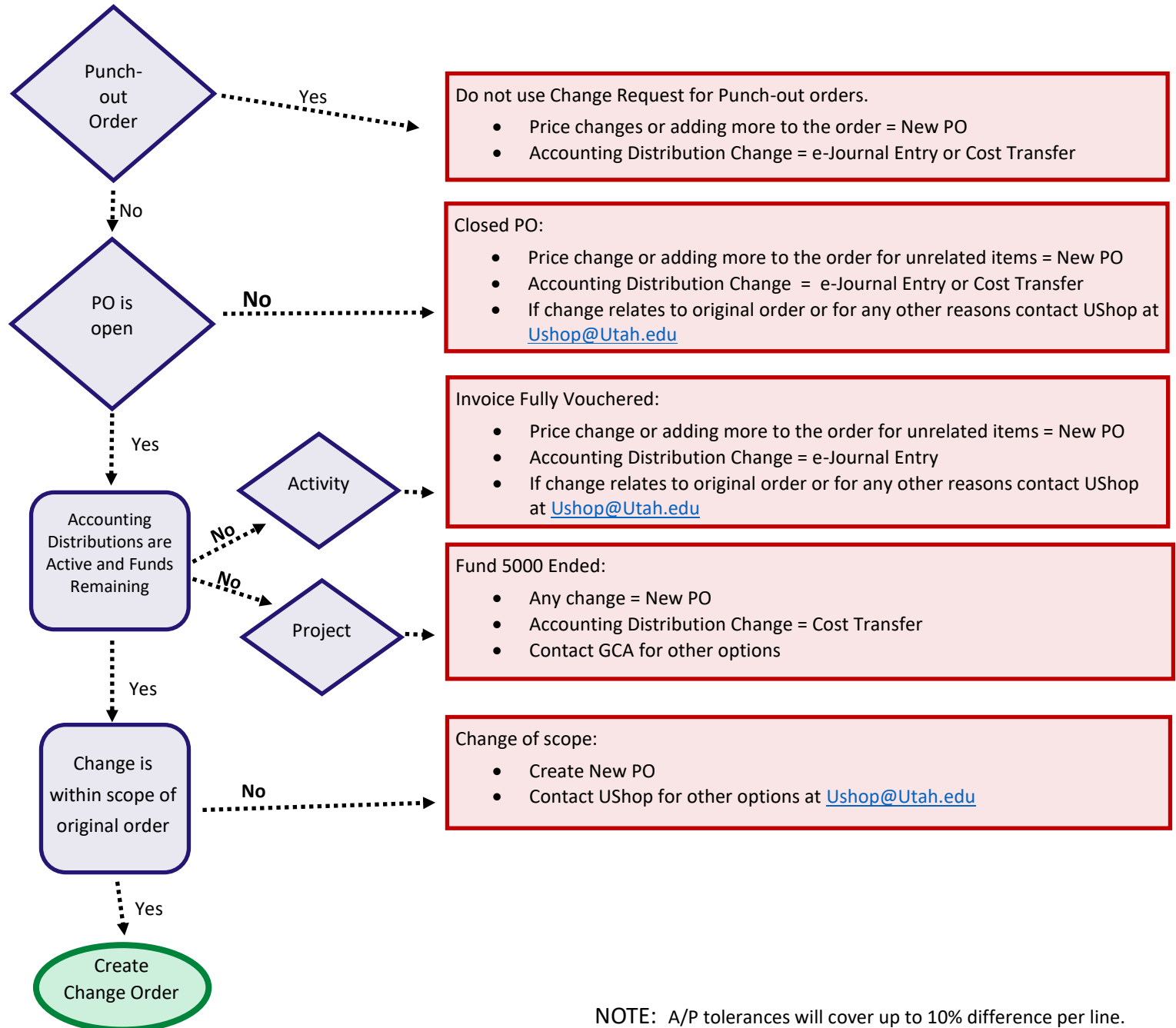
Purchase Request or Quick Order

- Look in the Supplier/Distribution Information Section for the PO Distribution Methods.
- Scroll to Distribution Methods Distribution Methods
- View How the PO was sent to the supplier -- Email or Manual 
- If the PO was sent by email, refer to email address (see slide 11)
- If the supplier has a Hand Icon  the shopper must get the PO to the supplier. At that time the shopper may ask for an estimated time of delivery. (See slide 11 for how to Save or Print the PO)

❖ Begin by **Asking Yourself:**

- **Should** a change be made to the PO?

PO Change Order



❖ Change Order help:

NOTE: A/P tolerances will cover up to 10% difference per line. Changes are not needed to cover these fluctuations in costs.

Invoice

Overview from PO

- To view the information below click on the Invoices Tab on the PO

Invoices

Purchase Order ▾ : PO Number for the

Status Summary Revisions **1** Shipments Change Requests Receipts **Invoices 1** Comments Attachments History

Click on the Invoice number, in blue, to see the full invoice detail.

Records found: 1, Totaling: 341.00 USD +

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
VO001222	234e76	3/5/2021	4/4/2021	Invoice	Payable	341.00 USD	HOLLEY, HEATHER M

Line Details

Line No.	Product Name	Catalog No.	Unit Price	Qty/UOM	Extended Price	Invoice Qty/Cost	Status
1	test Refresh		11.00 USD	7 EA	77.00 USD	n/a / 44.00 USD n/a / 33.00 USD	Open Net Invoiced
2	same		77.00 USD	7 EA	539.00 USD	n/a / 231.00 USD n/a / 308.00 USD	Open Net Invoiced

- Invoiced Quantities and Dollars
- Open** = Available Dollars to Invoice
- Net Invoiced** = Fully Spent.

Note: PO's remain open until the last penny has been invoiced

Invoice Payment Detail



1- To view the information below click on the Invoices Tab on the PO Invoices

2- Click on the Invoice number, in blue.

Invoice No.	Supplier Invoice No.	Invoice Date	Due Date	Invoice Type	Payment Status	Invoice Total	Invoiced By
V0001236	AHappyDance	3/24/2021	4/3/2021	Invoice	Payable	77.00 USD	HOLLEY, HEATHER M

Invoice : V0001236

Summary | Matching | Supplier Messages | Comments | Attachments 1 | History

Supplier Name: ↑ **A LOT OF FUN STUFF**

Supplier No.: 0000132028

Invoice Type: Invoice

Invoice Source: Manual

Invoiced By: HEATHER M HOLLEY

Voucher Number: V0001236

Contains substituted item(s): ✗

Invoice Name: 2021-03-24 u0109782 02

Invoice Information

Document Control Number: no value

Supplier Invoice No.: AHappyDance

Invoice Date: 3/24/2021

Accounting Date: 3/24/2021

Discount Date: no value

Due Date: 4/3/2021

Payment Status Information

Pay Status: Payable

Payment (Check) Date: Date supplier was paid

Payment (Check) Number: Check Number from Peoplesoft

Total Payment (Check) Amount: Amount paid to the supplier

Payment Method: Check or ACH

Match Status: Matched

External Attachments

Attachment	Date
↓ IRS W9.pdf	3/24/2021

Discount, tax, ship, handling

Allocation	Sum of All
	Header-level Sum of lines
Discount	0.00 USD 0.00 USD
Tax 1	0.00 USD 0.00 USD
Tax 2	0.00 USD 0.00 USD

Updates after the payment is made in Peoplesoft

Attachments update with links to OnBase after payment

For **line level** invoice detail, keep scrolling down on this screen.

Date the Invoice was entered into UShop

Date the payment will be made by this date

How to Close a PO in UShop

*****Note the PO will automatically close when the final 0.01 on the PO has been invoiced*****

1. Make sure that the final invoice has been paid in full

Payment Status
Paid

2. Click on the Drop-Down Arrow by the words Purchase Order

Purchase Order 

3. Click Close PO

Close PO

4. Add a Note that explains the closure of the PO.

5. Click OK

Add Note

Specify the reason for changing the A/P status to closed.

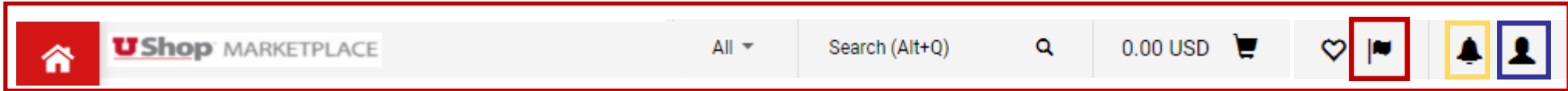
For Example: Final Invoice Paid

1000 characters remaining [expand](#) | [clear](#)



Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

OK Cancel

Assigned Carts and/or Approvals




Where to find What to Review and/or Approve

1. Click **Action** Items (Flag Icon) 
 - a. **Action is required** for the transaction to move forward in workflow (Requisition workflow and/or Invoice workflow)
2. System updates (Bell Icon) 
 - a. Workflow updates managed by the system. History of those actions is available here. The requisition/invoice can be accessed through these notifications.

❖ **Profile**  contains your [Notification Preferences](#) which can be edited by you.

Find Carts Assigned to me

1. Click **Action** Items (Flag Icon) 
2. Look at Action Items – **Carts** Assigned to Me



Manager Tools



Available to all Ushop Roles

View others draft Carts

○ Click:

- Shop
- Admin
- View Draft Carts from Other Users



○ Search –

Note: you can type partial information to return larger results

- ◆ Example: To search for Heather Holley
 - First Name: Hea
 - Last Name: Hol
 - Click Enter

- ◆ **Cart Name:** Clicking on the Cart Name will provide an overview of the Cart
- ◆ **History:** Clicking on the History will show each historical step this Cart has taken

Assignee Name ▲	Originator Name ▲	Cart Number ▲	Cart Name ▲	Date Created ▲	Cart Description	Total ▲	History
HEATHER M HOLLEY	HEATHER M HOLLEY	141774017	REPLACEMENT OF PO U000295831	3/12/2021		2,273.85 USD	view cart history
HEATHER M HOLLEY	HEATHER M HOLLEY	142614329	HH test cart	4/6/2021		50.00 USD	view cart history
HEATHER M HOLLEY	HEATHER M HOLLEY	143293708	2021-04-23 u0109782 01	4/23/2021		500.00 USD	view cart history
HEATHER M HOLLEY	HEATHER M HOLLEY	143294590	HH NEW experience	4/23/2021		18.86 USD	view cart history
HEATHER M HOLLEY	HEATHER M HOLLEY	144088183	HH NAME YOUR CART HERE TEST CART	5/14/2021		2,102.31 USD	view cart history

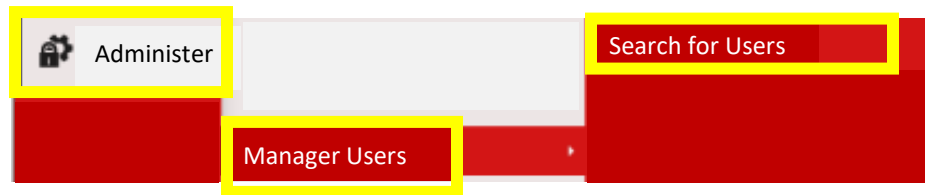
Manager Tools Continued



Role Search

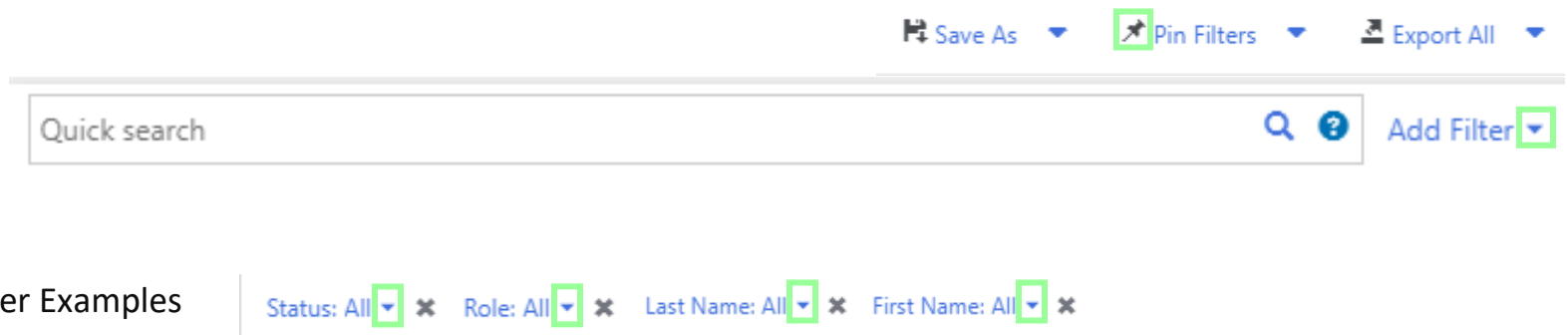
- Click:

- Administer
- Manager Users
- Search for Users



- Search Options:

- Name
- Uid
- Filters



❖ Note: to Search for multiple people use a comma between names

Searching and Reporting



Search Help

- How to search using [Filters](#)

Add Filter ▾

- How to set [columns](#)

Requisition	Supplier	Requisition Name	Submitted	Total Amount	PO Number	Prepared For	Current	Requisition
<input type="checkbox"/> Number ▾			Date ●	▾			Workflow Step	Status ▾

- How to [find transactions](#)

Reporting:

- [Search and Export to Excel](#)

Top Tips/Tricks



[Copy a Requisition](#) to a New Cart

Chartfields at the PO line level – *link in process*

Where is my [Cart](#) / What's in my [Cart](#)

UShop only [GFA](#)

Has my Invoice been processed/paid (*see pages 14 and 15*)

Link to [PCard only list](#). These suppliers have informed us that they will only process a transaction with a credit card.

I'm getting too many emails. How to change [Notification Preferences](#)

How to change my [email address](#) for UShop

How to create a [replacement PO](#)

How to request payment. [Email](#) invoice to ap@admin.utah.edu

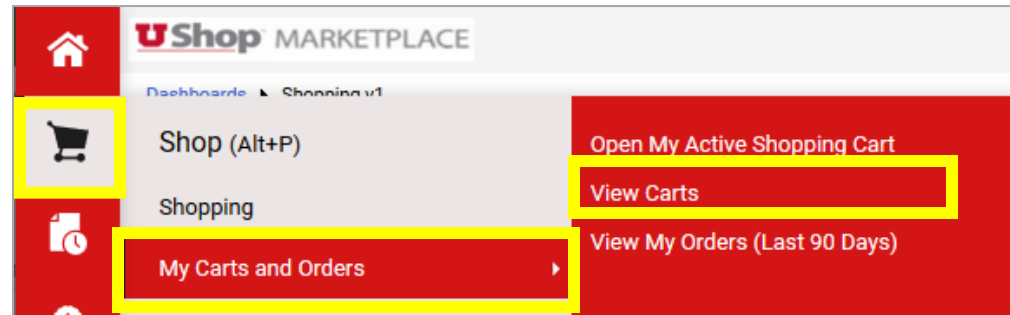
How to Assign a Substitute



(Note: this only applies to Carts, Not Requisition workflow)

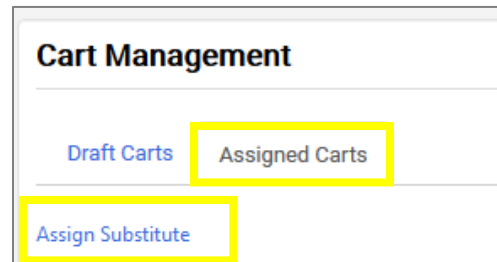
1. Click

- Cart Icon
- My Carts and Orders
- View Carts



2. Then Click

- Assigned Carts Tab
- Assign Substitute



3. Search for Substitutes name

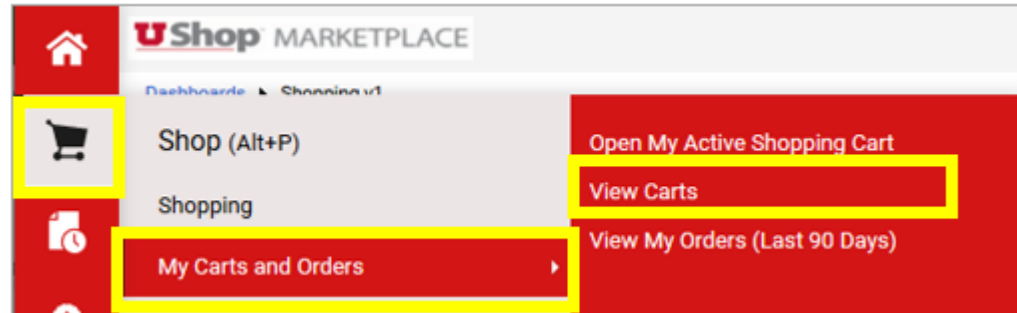
4. Click Select

Name ▲	User Name ▲	Email ▲	Phone	Action
HOLLEY, HEATHER M	u0109782	heather.holley@admin.utah.edu	+1 801-581-8194	[select]

How to End the Substitution

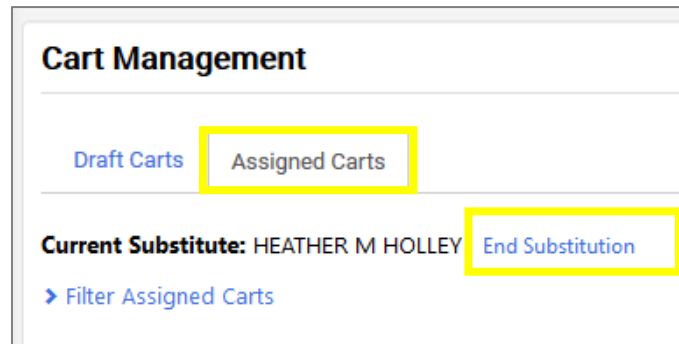
1. Click

- Cart Icon
- My Carts and Orders
- View Carts



2. Then Click

- Assigned Carts Tab
- End Substitution



Orders/Payments with Foreign Suppliers



When the supplier on an order, in the form of a PO, resides outside of the US there are a couple of actions that you may need to take to facilitate a smooth process from order to payment.

❖ Ask yourself/your department the following questions:

1. Will there be **customs or import fees**?
 - a. If yes then contact Anthony Ferrara, in Purchasing, to facilitate these fees.
2. Will there be additional **shipping fees** for overseas transport?
 - a. Does overseas transport need to be arranged by you?
3. **Payment** must be facilitated by wire transfer **by the department**.
 - a. [Wire Transfer Payment Request](#)
 - b. Email the filled-out form to <mailto:wiretransfers@utah.edu>
 - c. After the payment is made close the PO in UShop.
 - a. Make sure to add a note/comment that the invoice was paid by wire.