UShop MARKETPLACE

Rev March 9, 2021 V8 HH

Contents

Order & Payment States

Process Overview

CART

SHOP

Select what you want to buy utilizing:
- Punch-out catalogs

And / or
- Forms

CHECK-OUT

Proceed to Checkout:
- Delivery Address?
- How will it be paid for?
- Etc.

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

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.

RECEIVED

Order is received

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)

Order is received. Verify order for accuracy.

PAYMENT

INVOICE

Invoice sent to the University

PAYMENT

Payment is made to the supplier

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

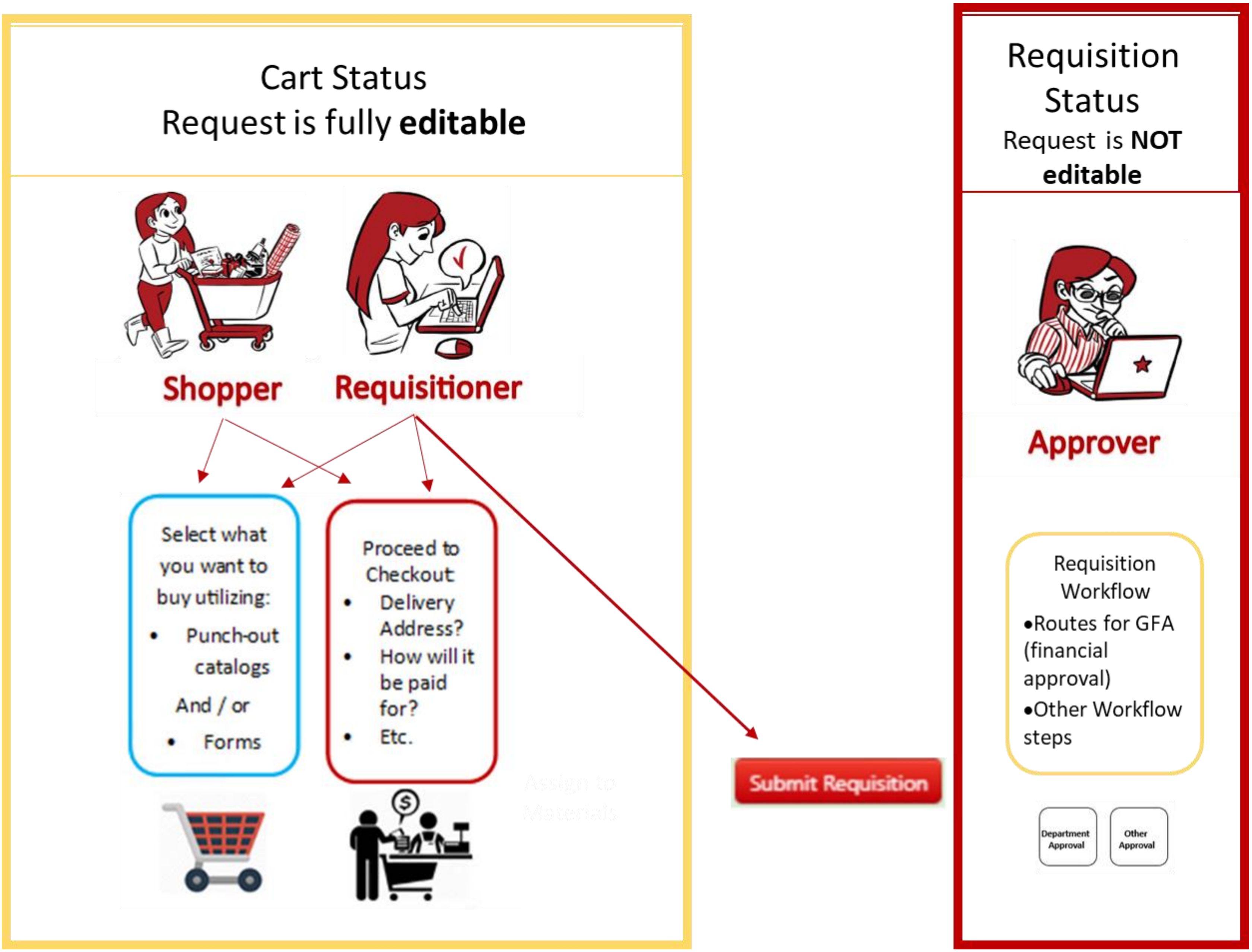
and reference the PO to pay against

Accounts Payable will pay the supplier

Roles & Cart Status vs Requisition Status

Roles & Decision for routing

Editable status vs **non-editable** status



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

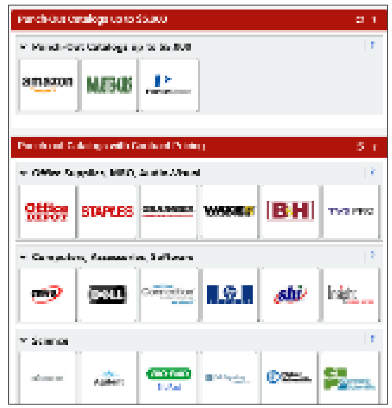
Cart Assignee

❖ Profile Helps

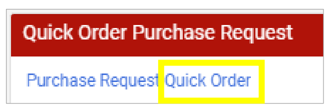
Shop

Overview of how to process a transaction in UShop

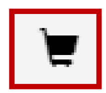
1. Choose what to purchase or shop for using



- [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 

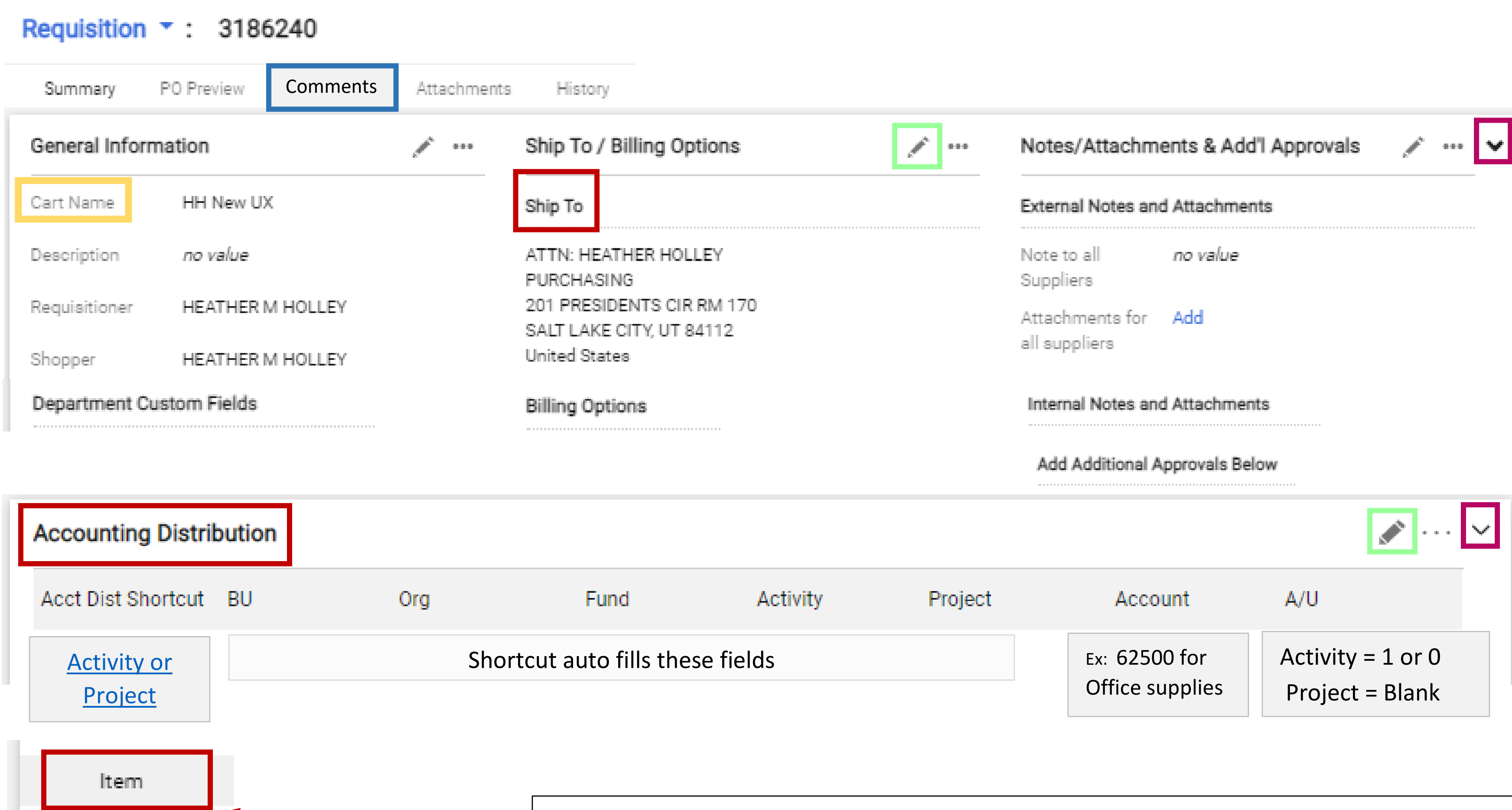
3. Name the Cart: Whatever helps you or department naming convention

4. Click Proceed to Checkout 

❖ Punch-out Helps ❖ Purchase Request Form Help ❖ Internal Supplier Forms Help ❖ Purchasing Helps

Proceed to Checkout - Required Fields

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



Review OR Edit

1- Review **what** is being purchased

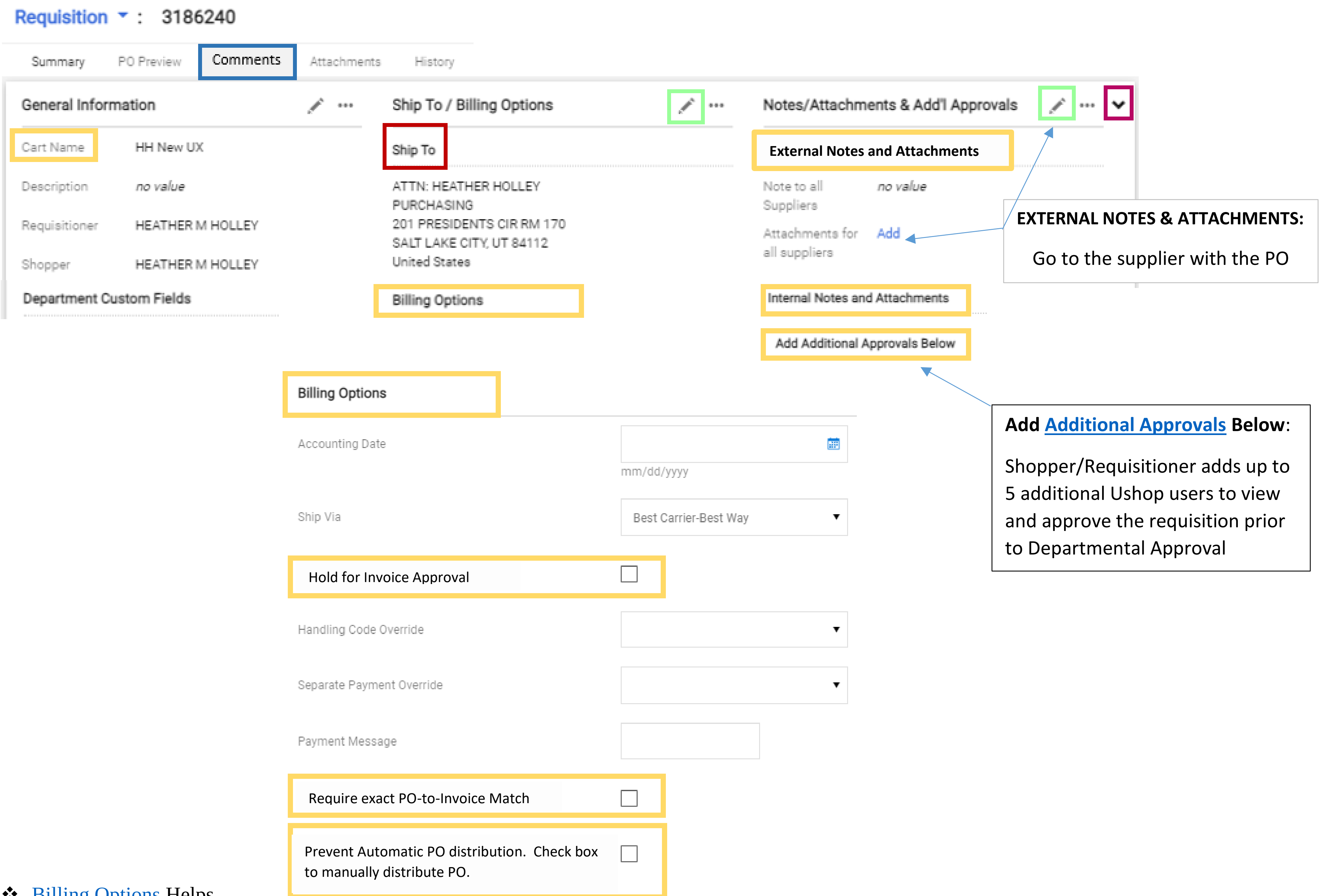
2- **Ship To** – ensure the order will go to the correct destination

3- **Accounting Distribution** – What activity(s) and/or project(s) will pay for this order

4- **Comments** – Review for instructions/help

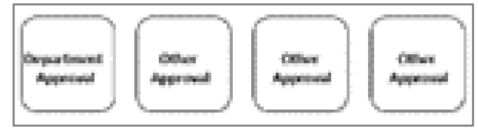
❖ Checkout Helps

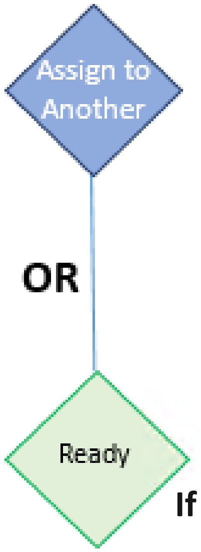
Proceed to Checkout - Options



❖ [Billing Options](#) Helps

Assign OR Submit Requisition



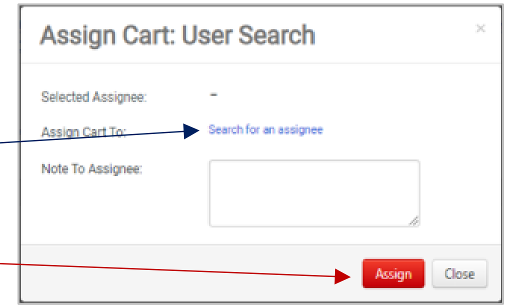


If the requisition will need review or changes made by someone else

Then Assign to appropriate person

1. Click on Assign Cart 

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

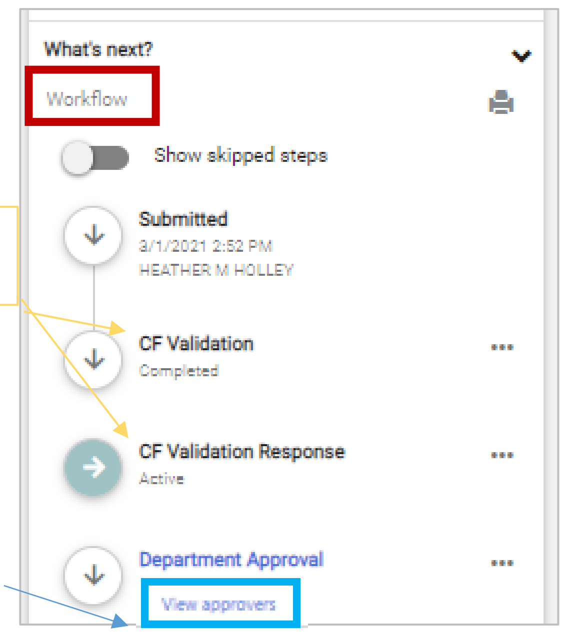


If the requisition is ready to proceed to GFA (financial approval

Then click Submit Requisition 

- ❑ This transaction is now in **Requisition** Workflow
  - ❑ See where your order is at any time in Workflow

Peoplesoft & UShop communicating

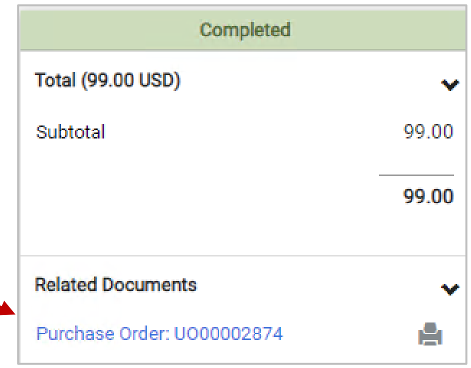


- To view who can approve any workflow step click On:
  - **View approvers**
  - This will show **who can approve** this order for each workflow step

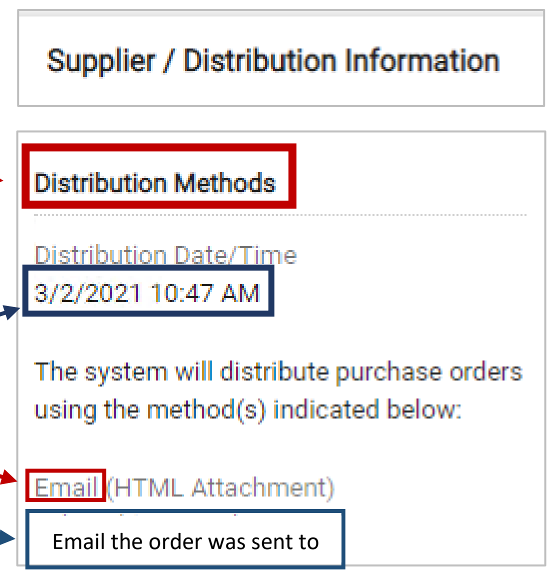
Where is my order?

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



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



See Order Details:

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

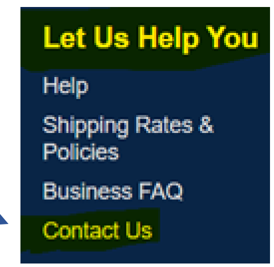
Need to Save or Print the PO?

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

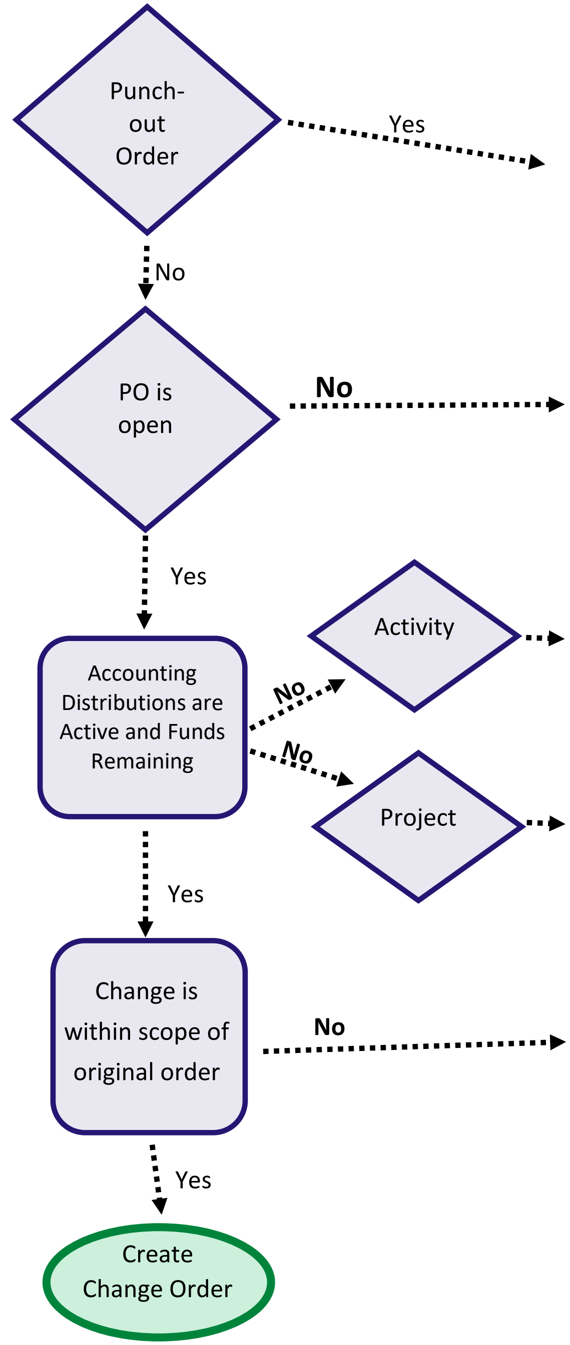
- Look in the Supplier/Distribution Information Section for the PO Distribution Methods.
- Scroll to Distribution Methods 

- 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



Do not use Change Request for Punch-out orders.

- Price changes or adding more to the order = New PO
- Accounting Distribution Change = e-Journal Entry or Cost Transfer

Closed PO:

- Price change or adding more to the order for unrelated items = New PO
- Accounting Distribution Change = e-Journal Entry or Cost Transfer
- If change relates to original order or for any other reasons contact UShop at Ushop@Utah.edu

Invoice Fully Vouchered:

- Price change or adding more to the order for unrelated items = New PO
- Accounting Distribution Change = e-Journal Entry
- If change relates to original order or for any other reasons contact UShop at Ushop@Utah.edu

Fund 5000 Ended:

- Any change = New PO
- Accounting Distribution Change = Cost Transfer
- Contact GCA for other options

Change of scope:

- Create New PO
- Contact UShop for other options at Ushop@Utah.edu

- 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
V0001222	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

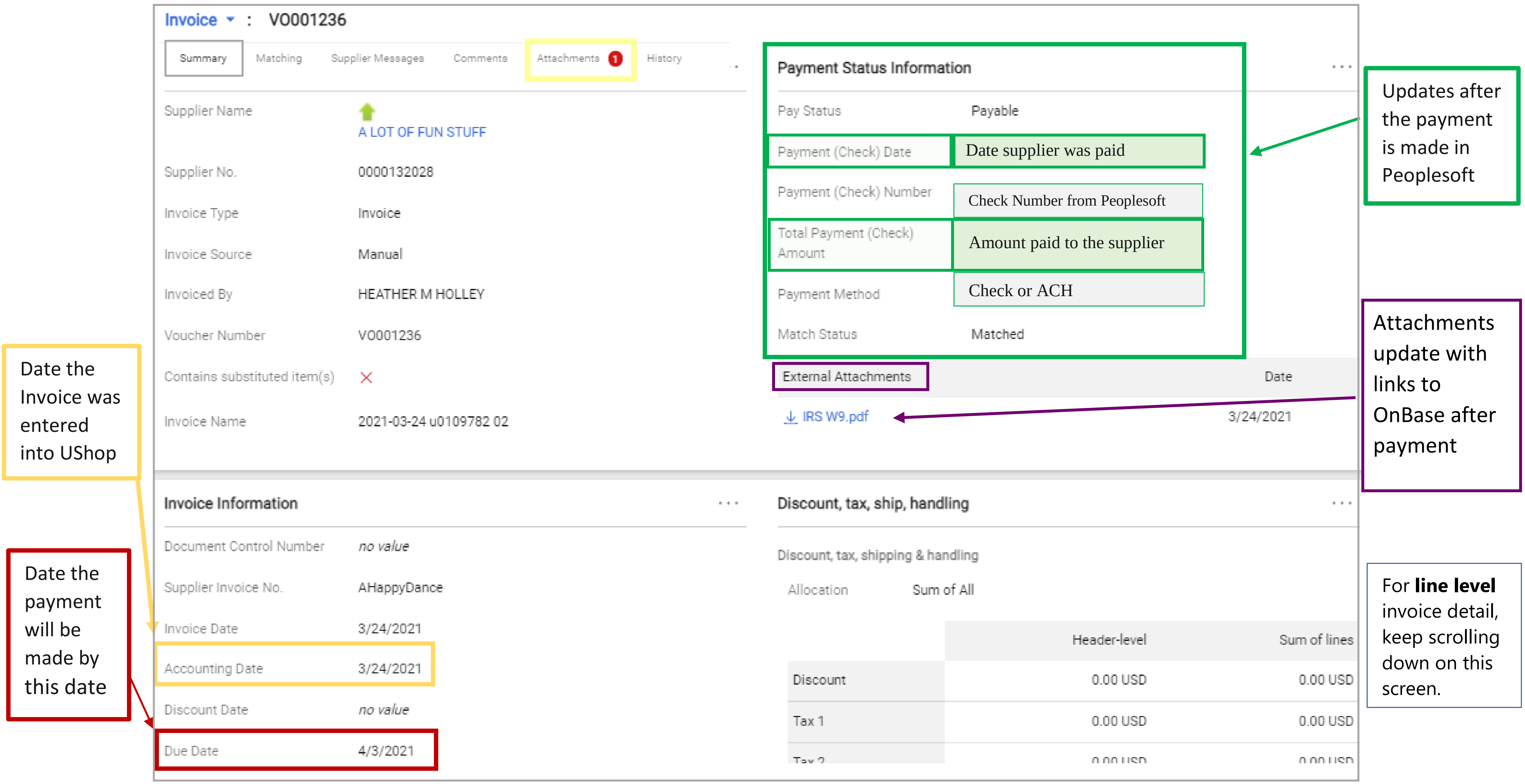
❖ Invoice Helps ❖ Email Invoice to A/P

Invoice Payment Detail

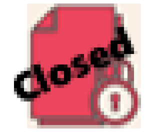
1- To view the information below click on the Invoices Tab on the PO **Invoices**

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



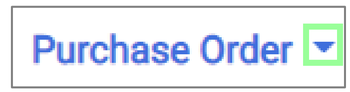
How to Close a PO in UShop



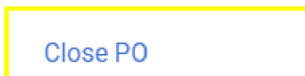
*****Note the PO will** automatically close **when the final 0.01 on the PO has been invoiced*****

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

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

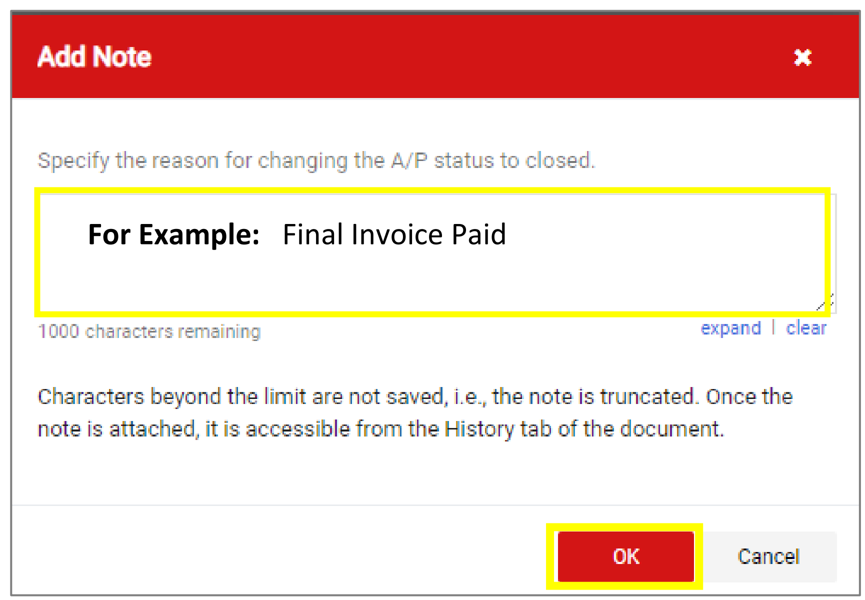


3. Click Close PO

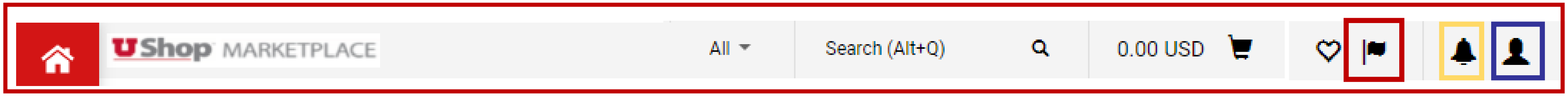


4. Add a Note that explains the closure of the PO.

5. Click OK



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)

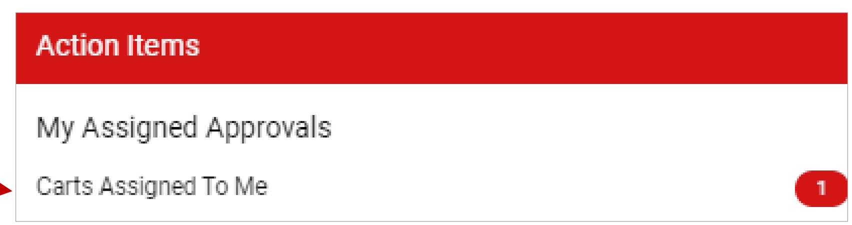
2. System updates (Bell Icon)

   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



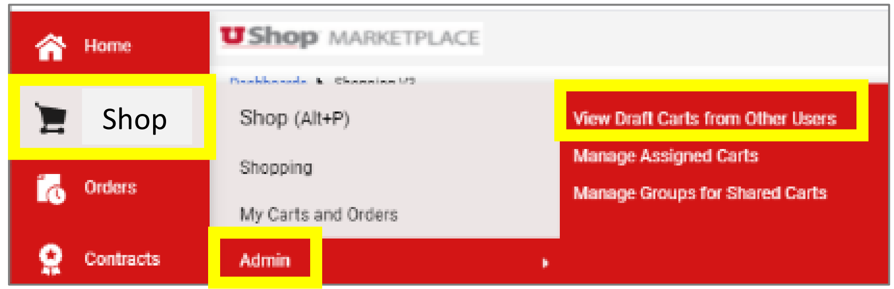
❖ Approver Helps ❖ Document Actions Helps ❖ Notification Helps

Manager Tools

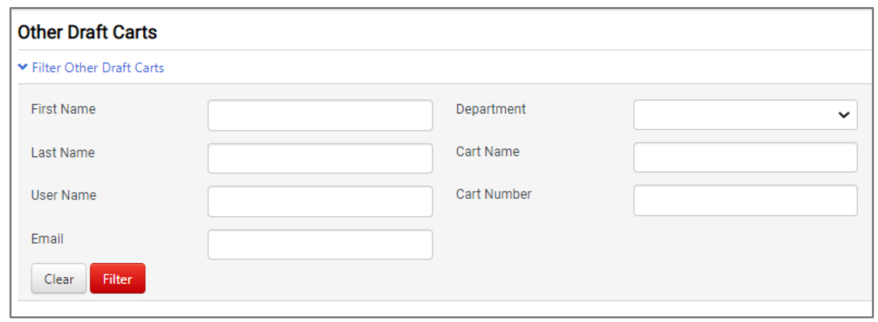
Available to all Ushop Roles

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



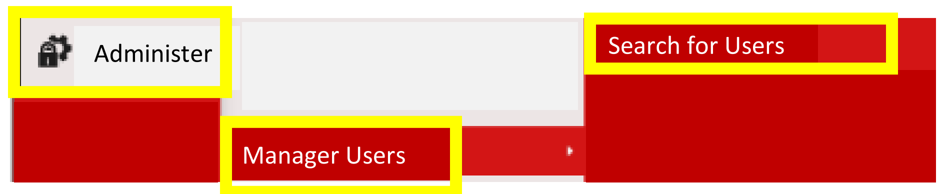
- ♦ **Cart Name**: Clicking on the Cart Name will provide an overview of the Cart
- ♦ **History**: Clicking on the History will show each historical step this Cart has taken

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
    - Filter Examples

❖ 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 Number	Supplier	Requisition Name	Submitted Date	Total Amount	PO Number	Prepared For	Current Workflow Step	Requisition 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

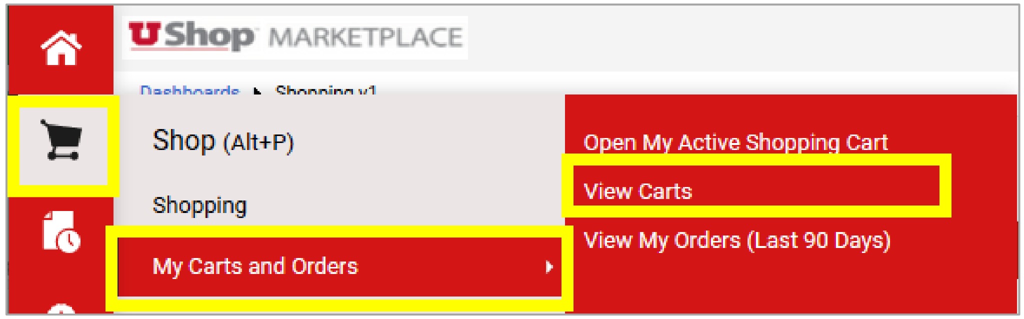
How to create a replacement PO

How to request payment. Email invoice to ap@admin.utah.edu

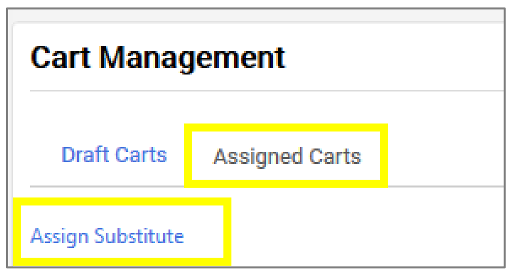
How to Assign a Substitute

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

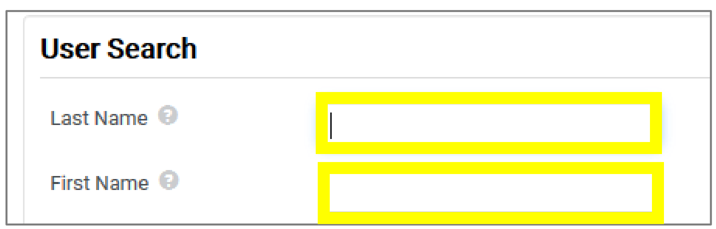
1. Click
   - Cart Icon
   - My Carts and Orders
   - View Carts



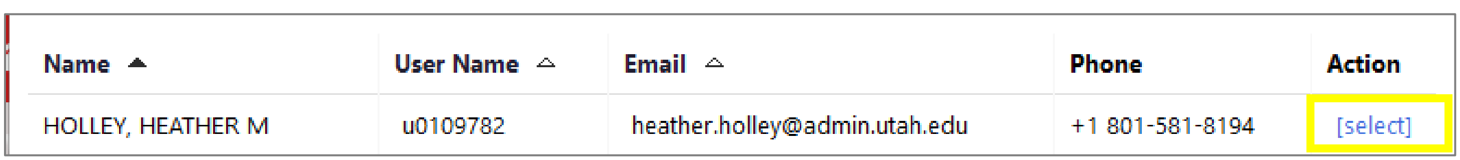
2. Then Click
   - Assigned Carts Tab
   - Assign Substitute



3. Search for Substitutes name



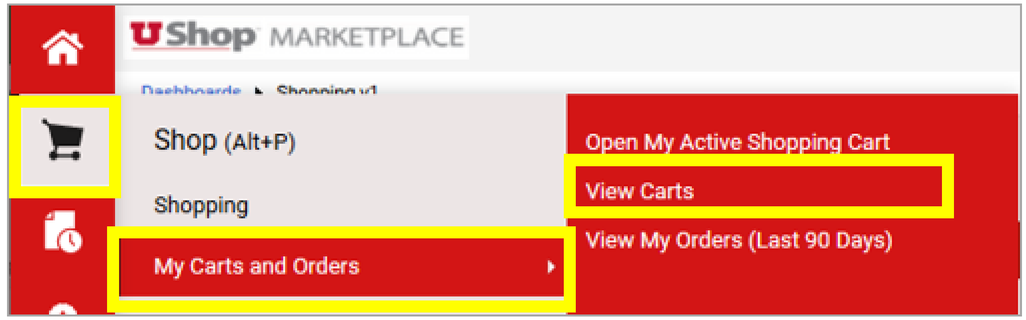
4. Click Select



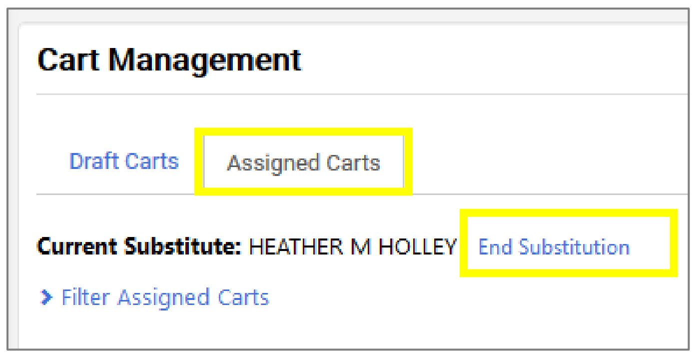
Name	User Name	Email	Phone	Action
HOLLEY, HEATHER M	u0109782	heather.holley@admin.utah.edu	+1 801-581-8194	[select]

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 fee**s 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.