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## Order & Payment States

<table>
<thead>
<tr>
<th>CART</th>
<th>REQUISITION</th>
<th>ORDER</th>
<th>PAYMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SHOP</strong>&lt;br&gt;Select what you want to buy utilizing:&lt;br&gt;- Punch-out catalogs&lt;br&gt;- And / or&lt;br&gt;- Forms</td>
<td><strong>CHECK-OUT</strong>&lt;br&gt;Proceed to Checkout:&lt;br&gt;- Delivery Address?&lt;br&gt;- How will it be paid for?&lt;br&gt;- Etc.</td>
<td><strong>SUBMIT</strong>&lt;br&gt;Submit Requisition&lt;br&gt;- Routes for GFA (financial approval)&lt;br&gt;- Other Workflow steps</td>
<td><strong>PO</strong>&lt;br&gt;PO is created by UShop and sent to the supplier.</td>
</tr>
<tr>
<td><img src="image" alt="Cart Icon" /></td>
<td><img src="image" alt="Checkout Icon" /></td>
<td><img src="image" alt="Submit Icon" /></td>
<td><img src="image" alt="PO Icon" /></td>
</tr>
<tr>
<td><strong>PAYMENT</strong>&lt;br&gt;Payment is made to the supplier</td>
<td><strong>INVOICE</strong>&lt;br&gt;Invoice sent to the University</td>
<td><img src="image" alt="Invoice Icon" /></td>
<td><img src="image" alt="Paid Icon" /></td>
</tr>
</tbody>
</table>

### Process Overview

- **Start of requisition workflow**<br>(This is now a requisition and is no longer a cart)
- **Order is received**
- **Verify order for accuracy.**
- **Invoice:**<br>- Should be sent by the supplier directly to Accounts Payable<br>- 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**

---

- This is the equivalent of checking out at the store. (will this order be delivered/how to pay, etc)
Roles & Cart Status vs Requisition Status

Roles & Decision for routing

Editable status vs non-editable status

Cart Status
Request is fully editable

Shopper
Requisitioner

Select what you want to buy utilizing:
• Punch-out catalogs
And / or
• Forms

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

Submit Requisition

Approver

Requisition Status
Request is NOT editable

Requisition Workflow
• Routes for GFA (financial approval)
• Other Workflow steps

Department Approval
Other Approval
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**

bolt Profi Helps
Overview of how to process a transaction in UShop

1. Choose what to purchase or shop for using
   - **Punch-out** Catalogs
     - And/or
   - **Forms**

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

**NOTE:** Type **New Supplier** if your supplier is not yet in UShop on the Purchase Request form
Proceed to Checkout - Required Fields

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

- **Cart Name**: HH New UX
- **Description**: no value
- **Requisitioner**: HEATHER M HOLLEY
- **Shopper**: HEATHER M HOLLEY

**Ship To**:
- **To**: ensure the order will go to the correct destination
- **Accounting Distribution**
- **Activity or Project**: Ex: 62500 for Office supplies
- **Activity** = 1 or 0
- **Project** = Blank

**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
**Procede to Checkout - Options**

**General Information**
- Cart Name: HH New UX
- Description: no value
- Requisitioner: HEATHER M HOLLEY
- Shopper: HEATHER M HOLLEY
- Department Custom Fields

**Ship To / Billing Options**
- **Ship To**
  - ATTN: HEATHER HOLLEY
  - PURCHASING
  - 201 PRESIDENTS CIR RM 170
  - SALT LAKE CITY, UT 84112
  - United States
- **Billing Options**
  - Accounting Date
  - Ship Via: Best Carrier-Best Way
- **Hold for Invoice Approval**
- **Require exact PO-to-Invoice Match**
- **Prevent Automatic PO distribution. Check box to manually distribute PO.**

**Notes/Attachments & Add'l Approvals**
- **External Notes and Attachments**
  - Note to all Suppliers
  - Attachments for all suppliers
  - **Add**
  - **Internal Notes and Attachments**
  - **Add Additional Approvals Below**

**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

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- **Billing Options** Helps
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
- 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

Punch-out Order

- Yes
- 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

Closed PO:
- Yes
- PO is open
- No
- Accounting Distributions are Active and Funds Remaining

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

Activity
- Yes
- No
- Project

Accounting Distributions are Active and Funds Remaining
- Yes
- Change is within scope of original order
- No
- Change of scope:
- Yes
- Create Change Order

Change Order help:
• Begin by Asking Yourself: Should a change be made to the PO?

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

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

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

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

2- Click on the Invoice number, in blue.

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

Updates after the payment is made in Peoplesoft

Attachments update with links to OnBase after payment

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

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

For Example: Final Invoice Paid
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

<table>
<thead>
<tr>
<th>Action Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Assigned Approvals</td>
</tr>
<tr>
<td>Carts Assigned To Me</td>
</tr>
</tbody>
</table>

_company_**Approver** Helps  _document_actions_**Document Actions** Helps  _notification_**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
Manager Tools Continued

Role Search

- Click:
  - Administer
  - Manager Users
  - Search for Users

- Search Options:
  - Name
  - Uid
  - Filters
    - Filter Examples

Notes: to Search for multiple people use a comma between names
Searching and Reporting

Search Help

- How to search using Filters
- How to set columns
- 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
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](mailto:wiretransfers@utah.edu)
     b. Email the filled-out form to [mailto:wiretransfers@utah.edu](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.