

CSUBUY End User Training Guide

CSUBUY is a Web-based sourcing solution for office supplies, electronics, laboratory products, and other commodities. CSUBUY provides a unified procurement and shopping environment. Members can enjoy powerful savings opportunities in grouping their spend that goes beyond any single organization’s ability.

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CSUBUY Link : <https://ds.calstate.edu/?svc=csubuy>

Roles

CSUBUY Marketplace roles of Shopper and Requester perform several actions related to searching for supplier goods and services, creating shopping carts, placing orders and tracking order status

Shopper

Users with Shopping-only permissions can add items and requests to a cart, then assign the cart to another individual (requester) for review, completion, validation and submission.

- Shoppers are allowed to shop, but cannot place an order
- A shopper “assigns” a cart to a requester.
- Shoppers simply add items to their cart but are not able to make payments

Requester

The term requester is used to identify individuals who are responsible for reviewing and submitting shopping cart orders:

- Requesters can submit their orders or orders assigned to them by a system shopper.
- Requesters can return a shopping cart from a Shopper if they have identified any discrepancies or have concerns.

Resource Definitions

Procard: A University issued Procurement Card.

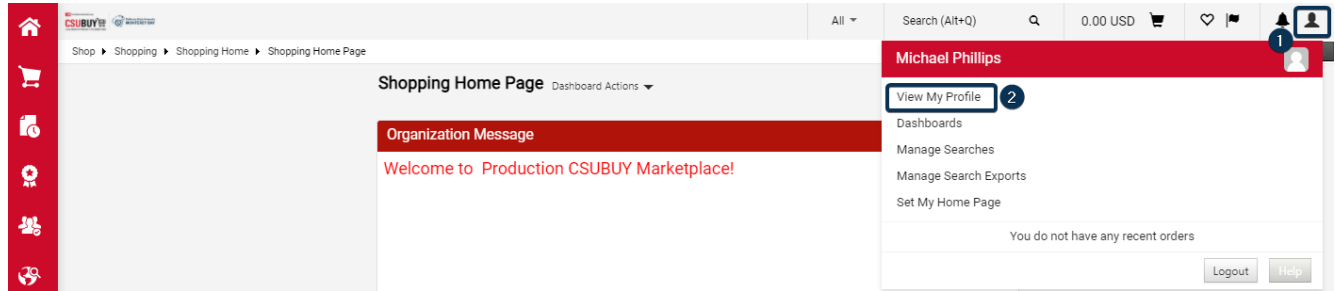
Requisition: Once the cart enters the checkout process it is assigned a requisition ID number

Purchase Order: Once the purchase requisition workflow is complete (Cart order is received by suppliers as purchase is finalized), a purchase order number is created.

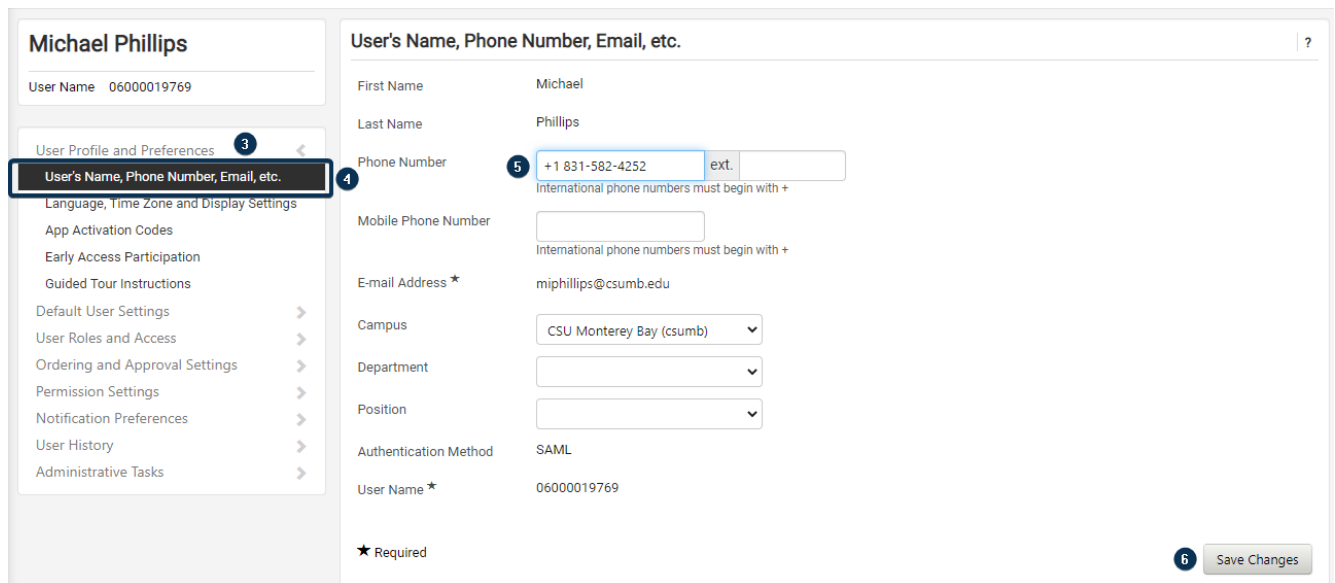
Updating Your User Profile

How to Add/Update Your User Preferences

1. Click on the profile icon.
2. Click on View My Profile

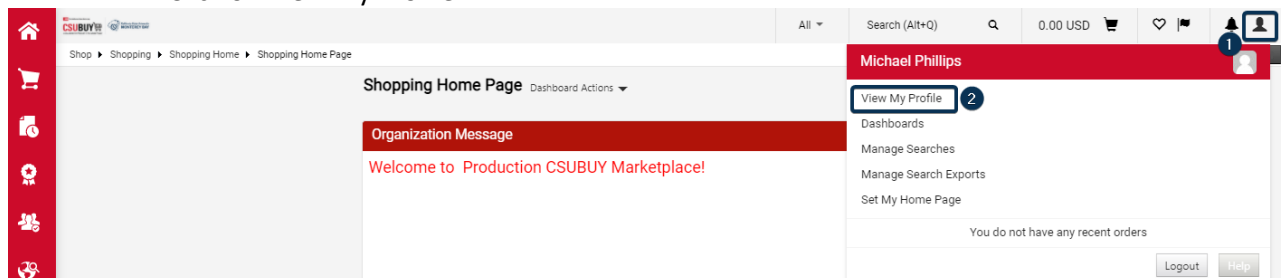


3. Navigate to User Profile and Preferences
4. User's Name, Phone Number, Email, etc.
5. Add/Verify your phone number
6. Click Save

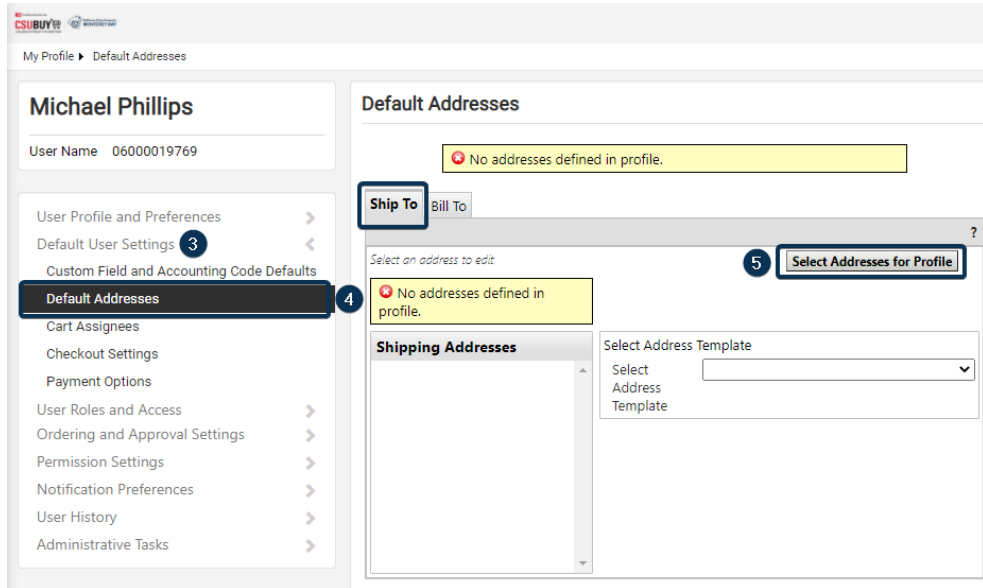


How to Add Your Ship to Addresses to Your Profile

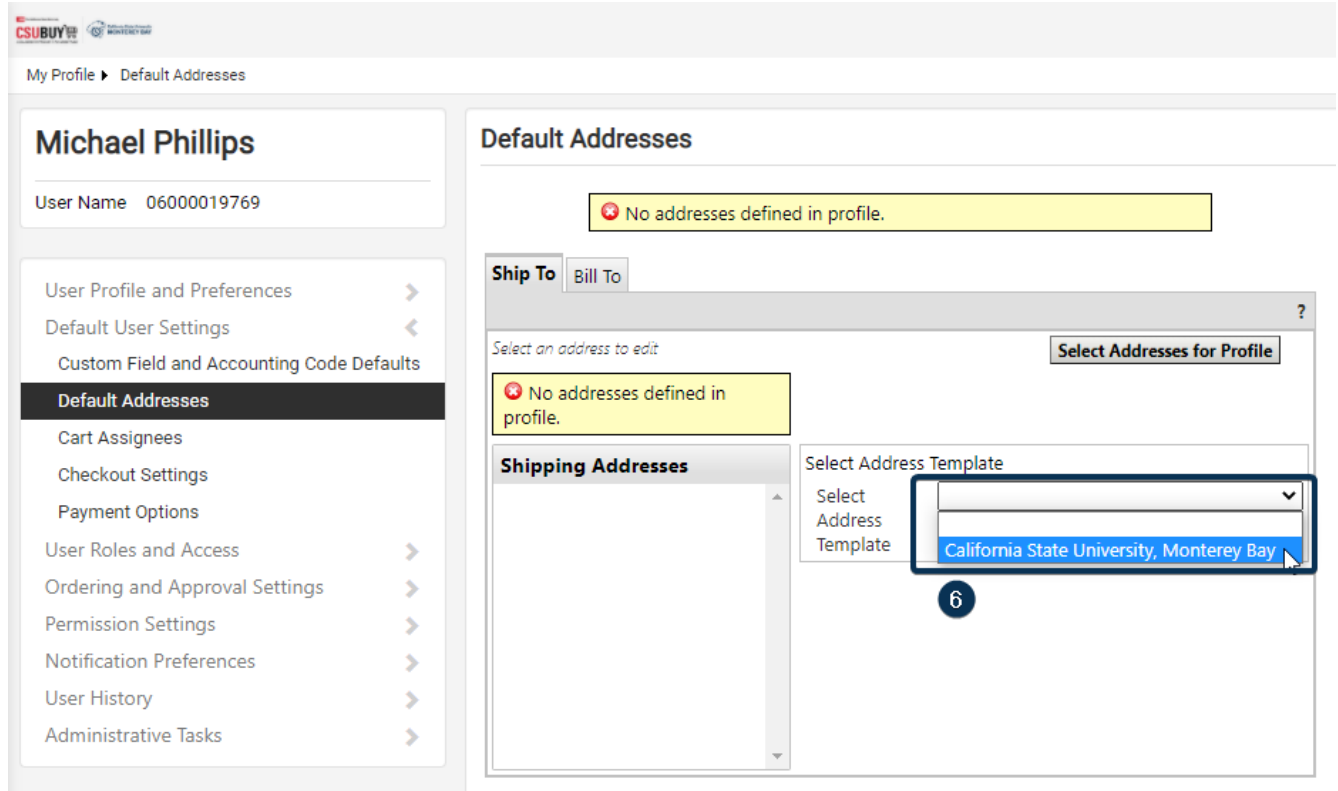
1. Click on the profile icon.
2. Click on View My Profile



3. Navigate to and click Default User Settings
4. Click Default Addresses



5. Click Select Addresses for Profile
6. Choose California state University, Monterey Bay address

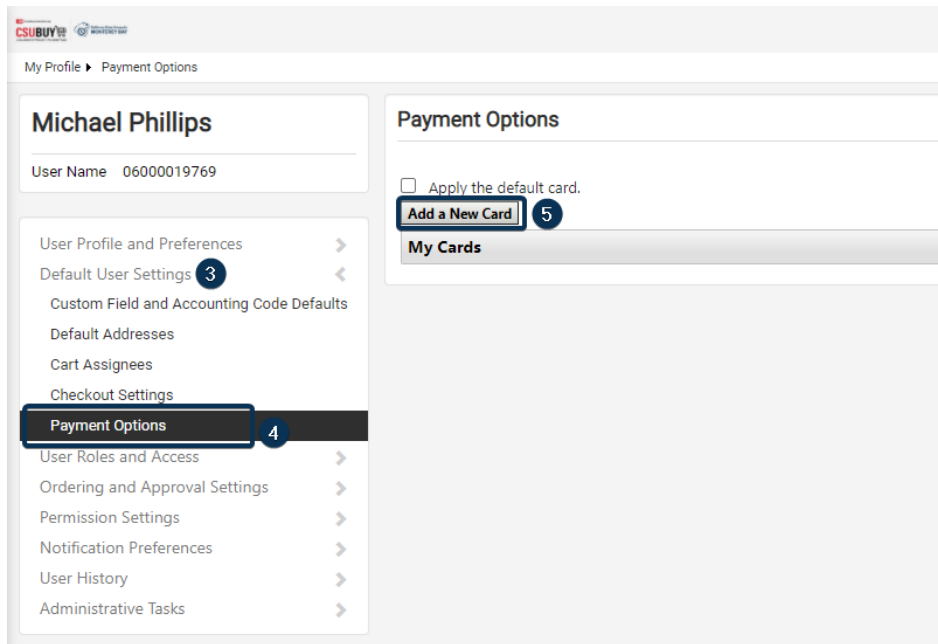


7. Choose the default box for the address you would like to default when checking out
8. Complete the "Deliver To:" portion with your Building and Room Number
9. Click Save
10. Click the "Bill To" tab, and then update that address (Repeat steps 5-9)

How to Add a Procard to Your Profile (Requesters only)

1. Click on the profile icon.
2. Click on View My Profile

3. Navigate to Default User Settings
4. Payment Options
5. Click Add a New Card and enter in the Procard details



6. Complete the Card Details section
7. (Optional) To have your Procard default in your shopping select “Default Card”
8. Click save

Card Details ?

Name this card (e.g. My Visa)

Cardholder Name

Card Number

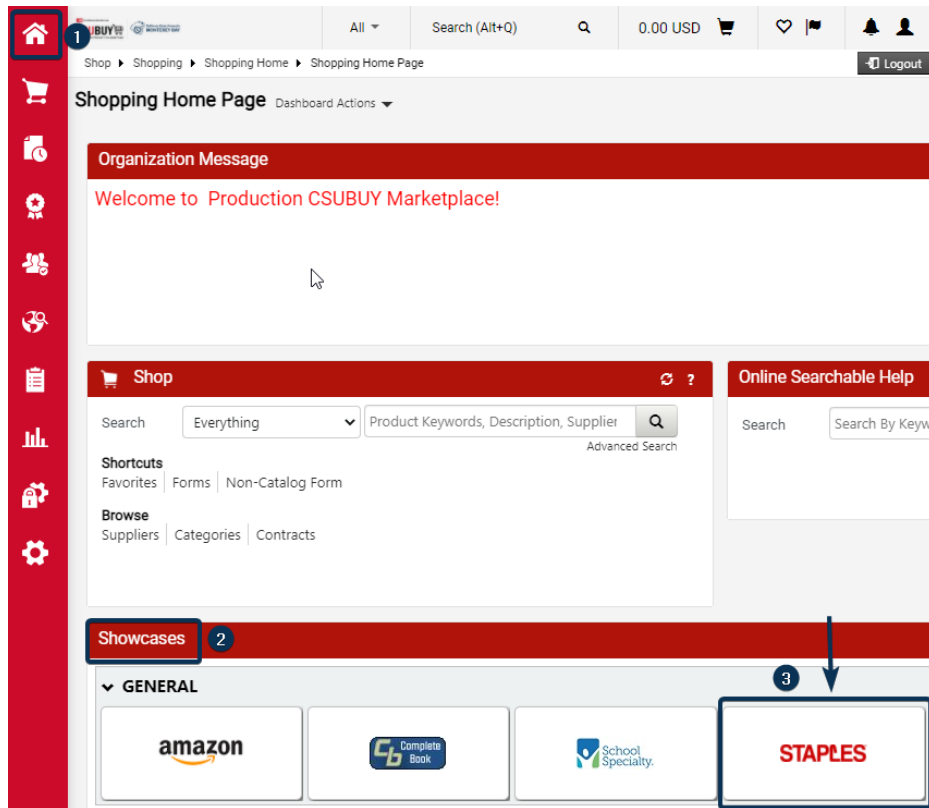
Expiration Date

Default card

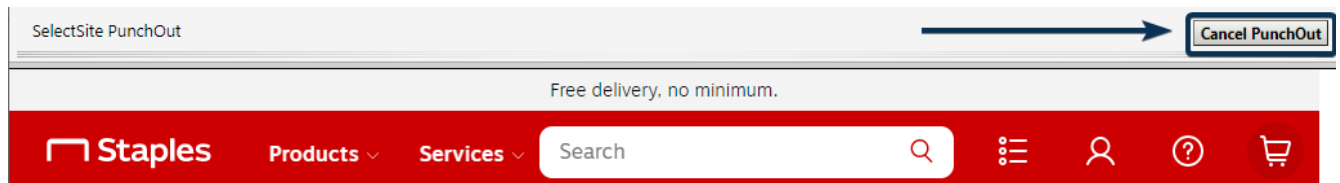
Ordering

How to Punchout to a Supplier Catalog (Referred to as a “PunchOut”)

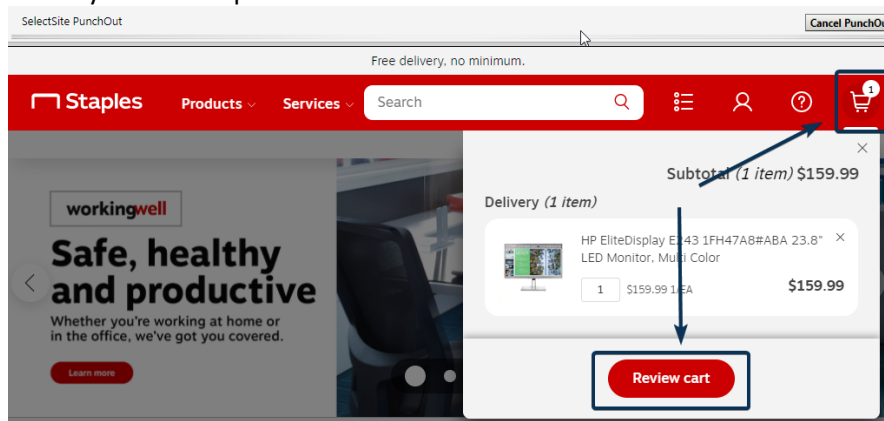
1. Navigate to the Home Page Menu Option
2. Look for the PunchOut/Storefront Catalogs Showcase
3. Click on the desired Supplier
 - * Please note that once clicked, some Supplier PunchOuts may appear in the same window, while some may open an additional window.



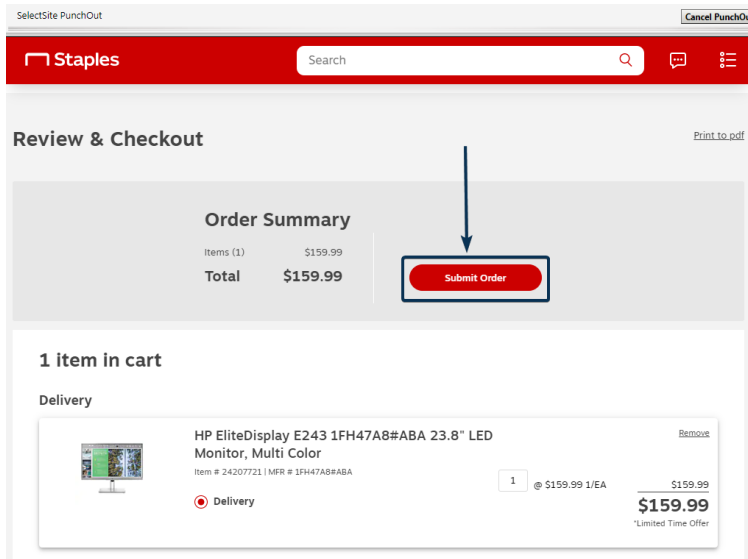
*You may at any time click Cancel PunchOut to return to CSUBUY (If you chose the wrong supplier or no longer wish to move forward with ordering with that Supplier/PunchOut)



4. Shop and add items to your cart as you normally would in an online storefront
5. Add items to your cart
6. Select your cart to proceed to checkout



7. Click on Submit Order



8. The Supplier PunchOut/Storefront will close and bring you back to CSUBUY to your CSUBUY shopping cart
 (You may repeat the 8 steps multiple times if you are shopping at more than one PunchOut/Storefront, which would create one CSUBUY Shopping cart order containing goods from multiple Suppliers)

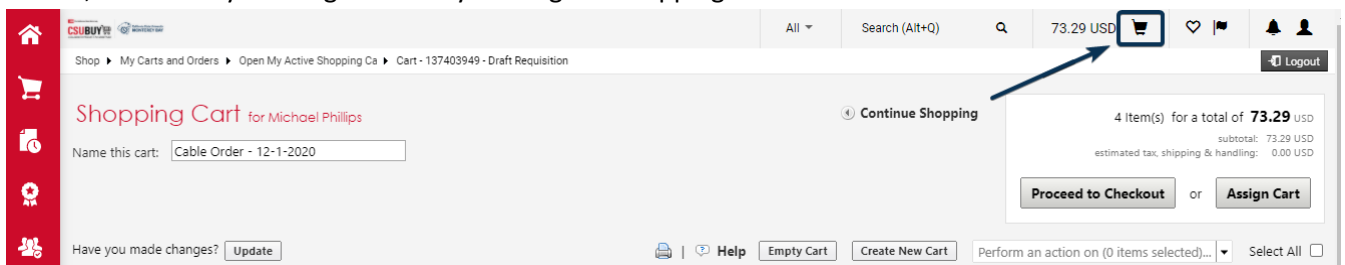
*Please note that not all storefronts will behave the same, but they will all generally go through the steps above of shopping, reviewing cart, and submitting an order.

*Some PunchOuts/Storefronts have minimum purchasing dollar thresholds and requirements (Staples having a \$50 minimum per order), to see a list of the benefits and requirements of each storefront, please view the [Supplier Description List on our Webpage](#).

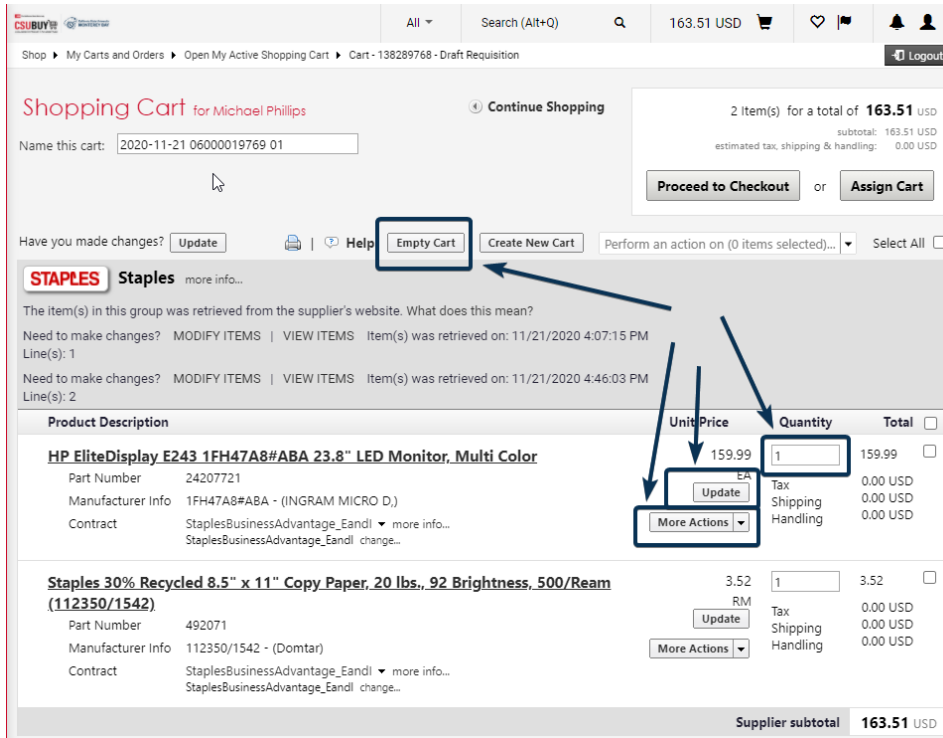
*Although some PunchOuts/Storefronts (Like CDW) have an “Email Cart” feature, this is not to be used/mistaken for the “Assign Cart” feature within CSUBUY, discussed in more detail below.

CSUBUY Shopping Cart

If you just returned from a PunchOut/Storefront, you will be greeted by this Shopping Cart screen, otherwise you can get there by clicking the shopping cart icon.



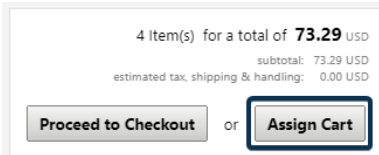
Users can freely edit their shopping carts by updating item quantities, clicking “More Actions” to then select “Remove” to remove items, and select “Empty Cart” to fully unload all items in cart.



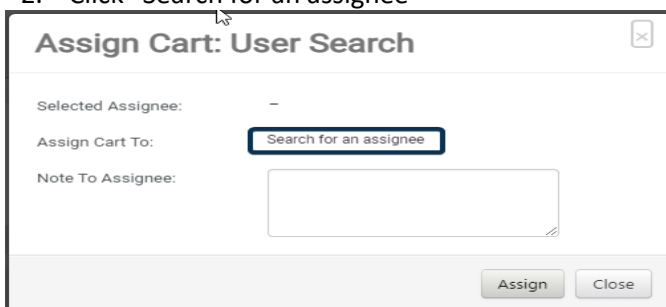
Assigning A Cart

Persons without a Procard, designated as the Shopper role, can assign their shopping cart to an individual in their Department/Division who has a Procard for making purchases (The Requester role). Please note that due to Amazon’s policy requirements, people with the Shopper role will not be able to shop and assign carts from Amazon.

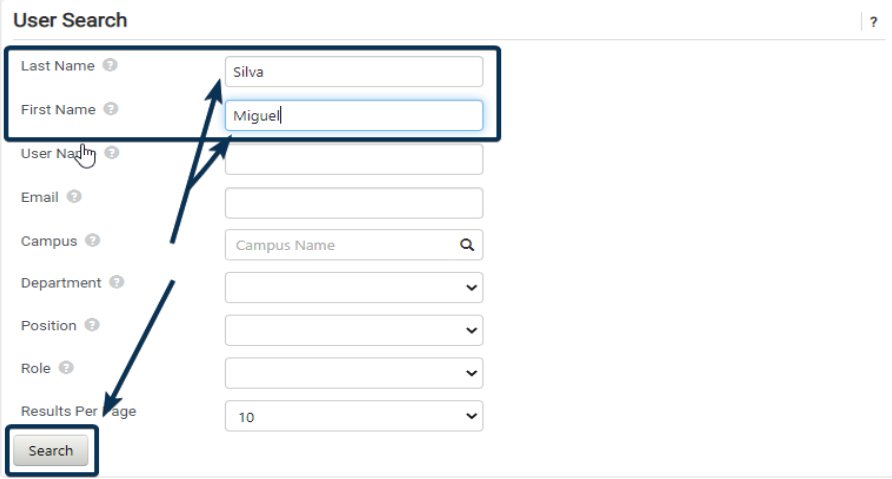
1. To assign a cart, click the “Assign Cart” button



2. Click “Search for an assignee”



3. Search for the individual who you will assign the cart to



User Search

Last Name

First Name

User Name

Email

Campus

Department

Position

Role

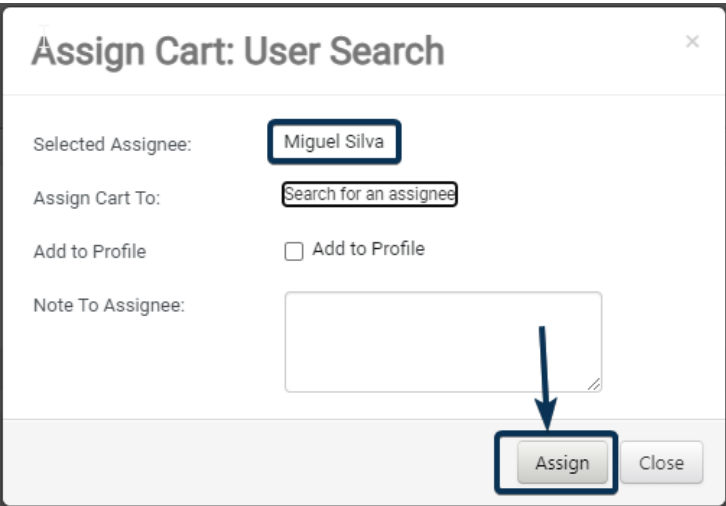
Results Per Page

Search

4. Click select on the person you are assigning the cart to

Name	User Name	Email	Phone	Action
Silva, Miguel	06000025555	msilva@csumb.edu		<input type="button" value="[select]"/>

5. Click "Assign" to complete the cart assignment"



Assign Cart: User Search

Selected Assignee:

Assign Cart To:

Add to Profile Add to Profile

Note To Assignee:

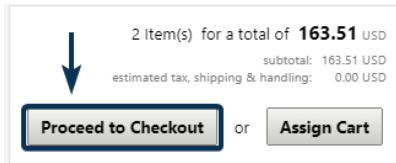
Assign

The person assigned the cart will receive an email shortly after to alert them that they have received a shopping cart to process. The normal ProCard guidelines will still apply, meaning that the "Requester" receiving the cart will still need to have approval from their approving official before finalizing the purchase.

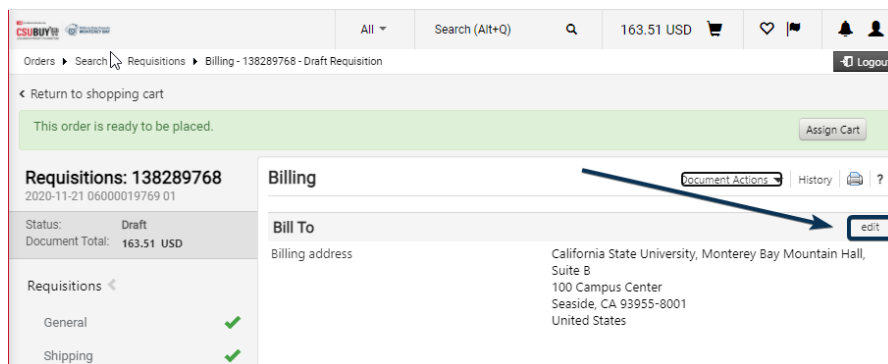
Checkout Process for “Requesters”

A Procard user (Requester) can check out a cart that they created or one that was assigned to them.

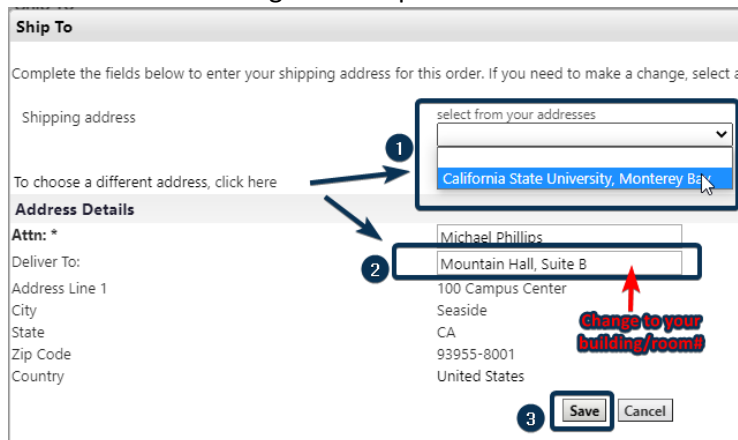
1. From the CSUBUY shopping cart click the “Proceed to Checkout” button



2. Most of the checkout details like the shipping address and billing address should be prefilled if you had already set up your defaults, but if not, you will need to click the “edit” button for each and enter your building/room#.



Following these steps:



3. Make sure you are in the Billing section, then Click the “edit” button for the Credit Card Info section

Orders > Search > Requisitions > Billing - 138289768 - Draft Requisition

< Return to shopping cart

This order is ready to be placed. [Assign Cart](#)

Requisitions: 138289768
 2020-11-21 06:00:019769 01

Status: Draft
 Document Total: 163.51 USD

Requisitions <

- General
- Shipping
- Billing**
- Accounting Codes
- Internal Notes and Attachm...

Billing Document Actions History ?

Bill To edit

Billing address California State University, Monterey Bay Mountain Hall, Suite B
 100 Campus Center
 Seaside, CA 93955-8001
 United States

Credit Card Info edit

No credit card has been assigned. [manage your cards...](#)

4. Either choose a saved Procard or enter in your Procard details and the hit "Save"

Credit Card Info

Complete the fields below to enter your credit card information for this order.

Choose one of your cards:
 Or to add a new credit card, click here

Card Details

Cardholder Name
 Card Number
 Card Security Code
 Expiration Date

OR

Dept 1018 Procard

1 2020

Save Cancel Clear

5. Click the Place Order button when ready to finalize the purchase.

Orders > Search > Requisitions > Billing - 137403949 - Draft Requisition

< Return to shopping cart

This order is ready to be placed. [Place Order](#) [Assign Cart](#)

Requisitions: 137403949
 Cable Order - 12-1-2020

Status: Draft
 Document Total: 73.29 USD

Requisitions <

- General
- Shipping

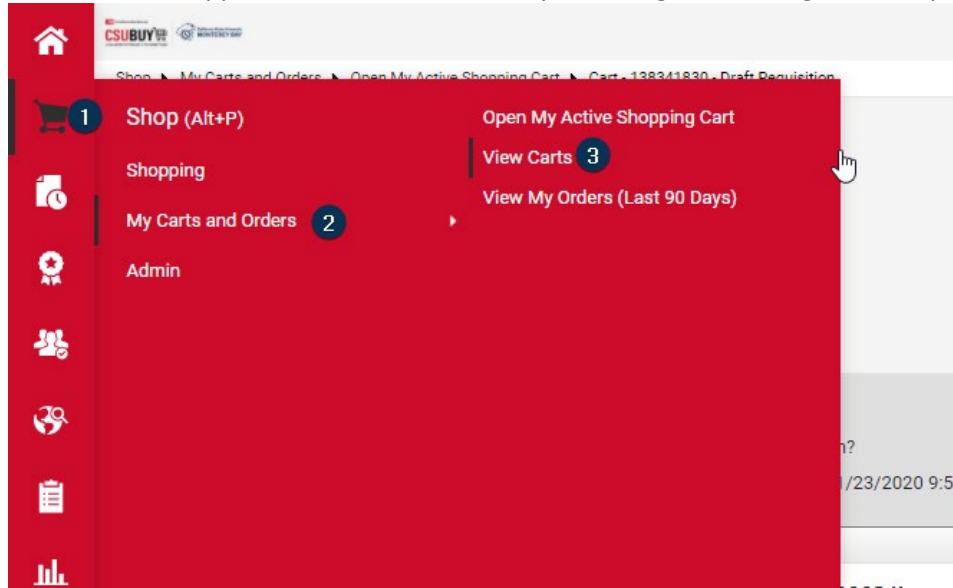
Billing Document Actions History ?

Bill To edit

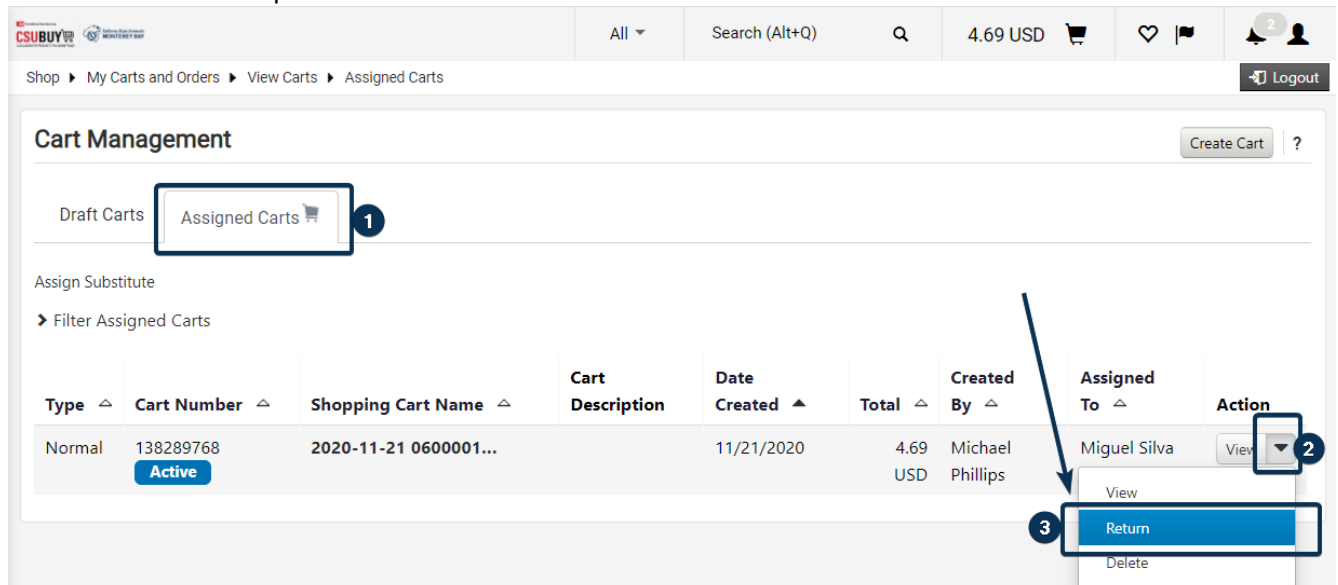
Billing address California State University, Monterey Bay Miguel Silva
 100 Campus Center
 Seaside, CA 93955-8001
 United States

Returning or Deleting a Cart

If a Procard user (Requestor) sees an issue with the cart that was assigned to them, they can return the cart back to the “Shopper” to address the issue by following and clicking these steps:



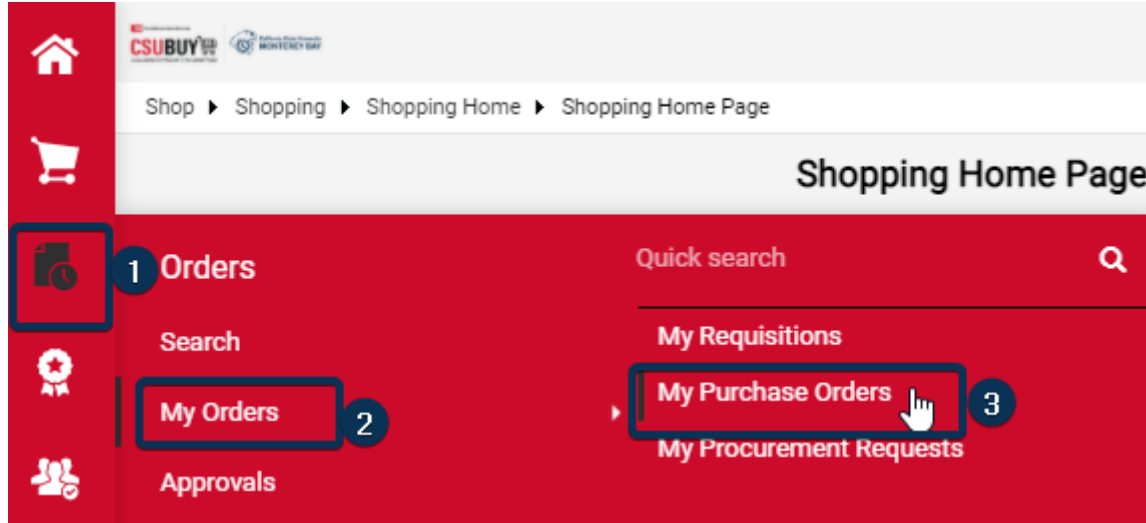
The user will then be greeted with a cart management screen to view their Draft Carts or their Assigned Carts. To return an assigned cart, click “Assigned Carts” and then click the down arrow next to “View”, then select “Return” from the drop down menu.



The Cart Management screen can also be used to delete carts from either the “Draft carts” or “Assigned Carts” section by selecting the delete option shown above.

How to Access Your Past Orders and Check Status

1. Navigate to Orders > My Orders > My Purchase Orders



2. Click the PO Number for more details

My Purchase Orders Save As Export

Created Date: Last 90 days Quick search Add Filter Clear All Filters

1-2 of 2 Results 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Prepared For	Shipment Status	Total Amount
3109530	Staples Advantage	5/12/2020 1:54:59 PM	Completed	2960932		Sent To Supplier	60.38 USD
3109529	CDWG	5/12/2020 1:54:59 PM	Completed	2960932		Sent To Supplier	1,168.84 USD

3. The status tab shows the details and workflow of your order

Status Summary Revisions Comments Attachments History

General Information

PO/Reference No. 3109530
 Revision No. 0
 Supplier Name Staples Advantage
 Purchase Order Date 5/12/2020
 Total 60.38
 Owner Name
 Owner Phone
 Owner Email
 Requisition Number

Document Status

A/P status Open
 Workflow **Completed** (5/12/2020 1:55 PM)
 The system distributed the purchase order using the method(s) indicated below the last time it was distributed:
 cXML (Electronic Integration) no value
 Manual
 Distribution Date/Time 5/12/2020 1:55 PM
 Supplier Sent To Supplier view

Completed

Total (60.38 USD)
 Subtotal 60.38
 Tax 0.00
 Shipping 0.00
 Handling 0.00
60.38

Related Documents
 Requisitions: 2960932

What's next?
 Next Step: Revise PO
 Approvers Automatically calculated by system

Workflow

- Submitted 5/12/2020 1:54 PM Kimberley Halmberg
- Revise PO Completed
- PO Distribution Completed
- Completed 5/12/2020 1:55 PM