

THE TEXAS
STATE
UNIVERSITY
SYSTEM



TSUS Marketplace

USER GUIDE

TEXAS  STATE[®]
UNIVERSITY
SAN MARCOS
The rising STAR of Texas

REV 01/2020

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

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Accessing the System

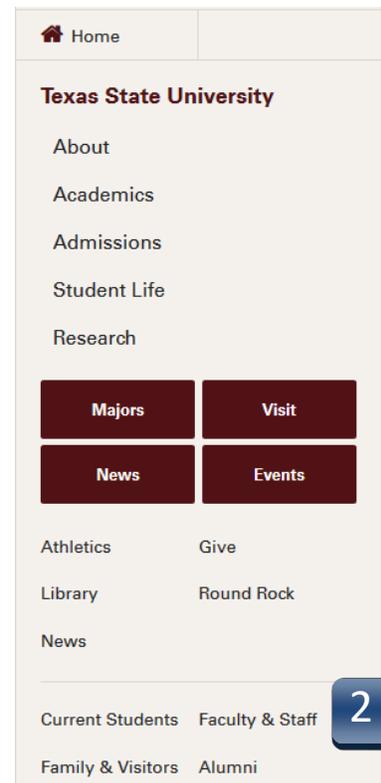
STEP 1: Go to the Texas State University home page: www.txstate.edu

STEP 2: On the home page, click on the **Menu** icon, click on **Faculty & Staff** and select **SAP Portal**.

STEP 3: Log in with NetID and password.

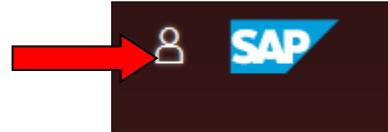
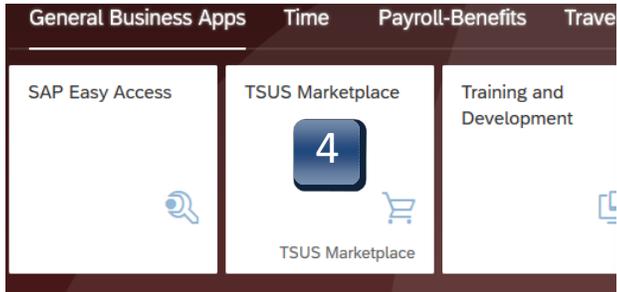


Texas State / Texas State University / Faculty & Staff



Accessing the System

STEP 4: Click on the **TSUS Marketplace** option. If the menu does not appear, click on the person icon in the upper left-hand corner.



Accessing the System - Home Page Navigation

STEP 5: A separate browser window will open with the TSUS Marketplace home page.

- A: **Main Workspace** - changes as you access areas of the site, displays breadcrumbs at top, under TSUS Marketplace logo.
- B: **Side Navigation Menu** - remains in place, when you roll over icons, slide-out submenus display, menus grouped by related tasks.
- C: **Top Banner** - user profile customization, action items, notifications, quick view of active shopping cart, quick search of site.

The screenshot shows the TSUS Marketplace home page. On the left is a dark blue vertical navigation menu with icons and labels for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. A callout box labeled 'B' is positioned over the Administer icon. At the top of the page is a header area with the TSUS Marketplace logo, a user profile dropdown for 'Judith Nicholson', a shopping cart icon showing '0.00 USD', and a search bar. A callout box labeled 'C' is positioned over the user profile dropdown. Below the header is a search bar with a dropdown menu set to 'Everything' and a 'Go' button. Below the search bar are navigation links for 'Go to' (advanced search, favorites, forms, non-catalog item, quick order) and 'Browse' (suppliers, categories, contracts, chemicals). The main content area is divided into several categories, each with a grid of supplier cards. The categories are: Science & Research (Fisher Scientific, SIGMA-ALDRICH, ThermoFisher Scientific, Airgas, VWR International, BIO-RAD), Technology (DELL, IBANUS, BH, CDWG, Connection, shi, GrayhaIR, ANIXER, Apple, GT Distributors, INC, HOWARD), Office & Furniture Suppliers (HBI, STAPLES, ROCKFORD, FedEx Office, business interiors), and Maintenance & Repair (MRO) (GRAINGER, SUPPLY, GUARDIAN, MCCOY'S, Sherwin-Williams, FASTENAL, WESCO). A callout box labeled 'A' is positioned over the 'business interiors' card. At the bottom left of the page is a 'Menu Search' icon.

System Functions - User Roles

Shopper

- Adds items to carts
- Assigns carts to Requisitioner

Requisitioner

- Adds items to carts
- Updates or changes carts
- Reviews assigned carts
- Places order
- Withdraws requisitions

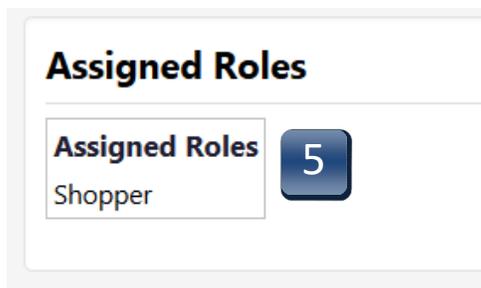
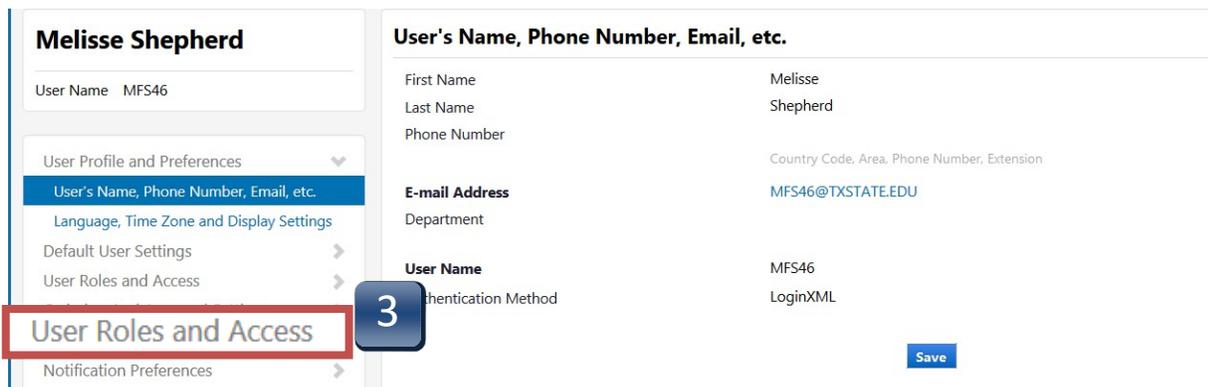
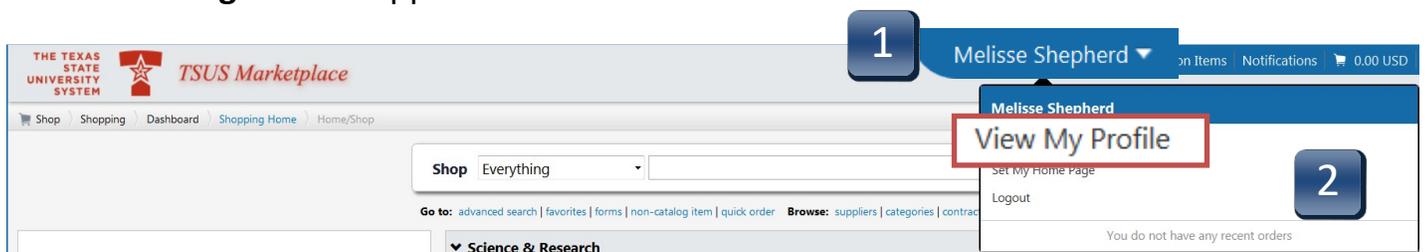
Approver

- Approves requisitions
- Rejects lines or entire requisition

Role assignments can be changed with submission of SAP Security form to ITAC. To view your assigned role, follow instructions on the next page.

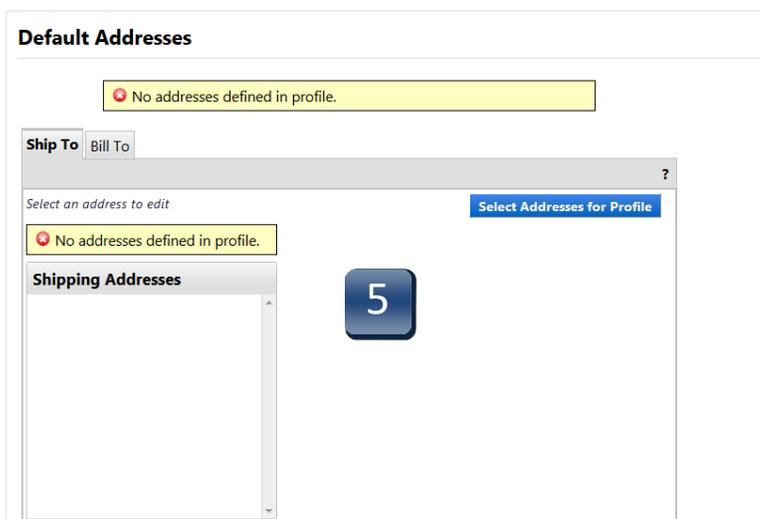
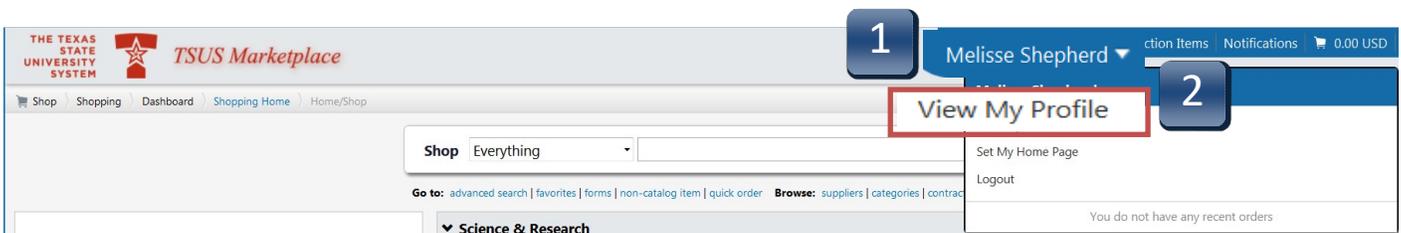
System Functions – How to Identify User Roles

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page
- STEP 2:** Select **View My Profile**. **My Profile** page appears.
- STEP 3:** Select **User Roles and Access**.
- STEP 4:** Select **Assigned Rolls**.
- STEP 5:** **Assigned Roll** appears.



System Functions – Profile Setup – Default Shipping Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** **View My Profile.** My Profile page appears.
- STEP 3:** Select **Default User Settings.**
- STEP 4:** Select **Default Addresses.**
- STEP 5:** **Default Address** box appears.



System Functions - Profile Setup – Default Shipping Address

- STEP 6:** Under the **Ship To** tab, click **Select Addresses for Profile** button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose your shipping location. (San Marcos users will select **UDC**—University Distribution Center. Round Rock users will use **RRHEC**—Round Rock Higher Education Center or **RRSON**—Round Rock School of Nursing).

The screenshot shows the 'Default Addresses' window with the 'Ship To' tab selected. A yellow message box at the top states 'No addresses defined in profile.' Below this, there are two more 'No addresses defined in profile.' messages. The 'Select Address Template' dropdown menu is open, showing a list of address codes: CHA, CRC, DHRL, ETS, FAC, FCS, HRL, KAP, MSE, OHC, RRHEC, RRSON, SBDC, SHC, SHC-P, STAR, TJCT, TSUS, and UDC. A blue circle with the number '6' is positioned over the 'Select Addresses for Profile' button. A blue circle with the number '7' is positioned over the dropdown menu. Red boxes highlight the 'RRHEC', 'RRSON', and 'UDC' options in the dropdown menu.

System Functions - Profile Setup – Default Shipping Address

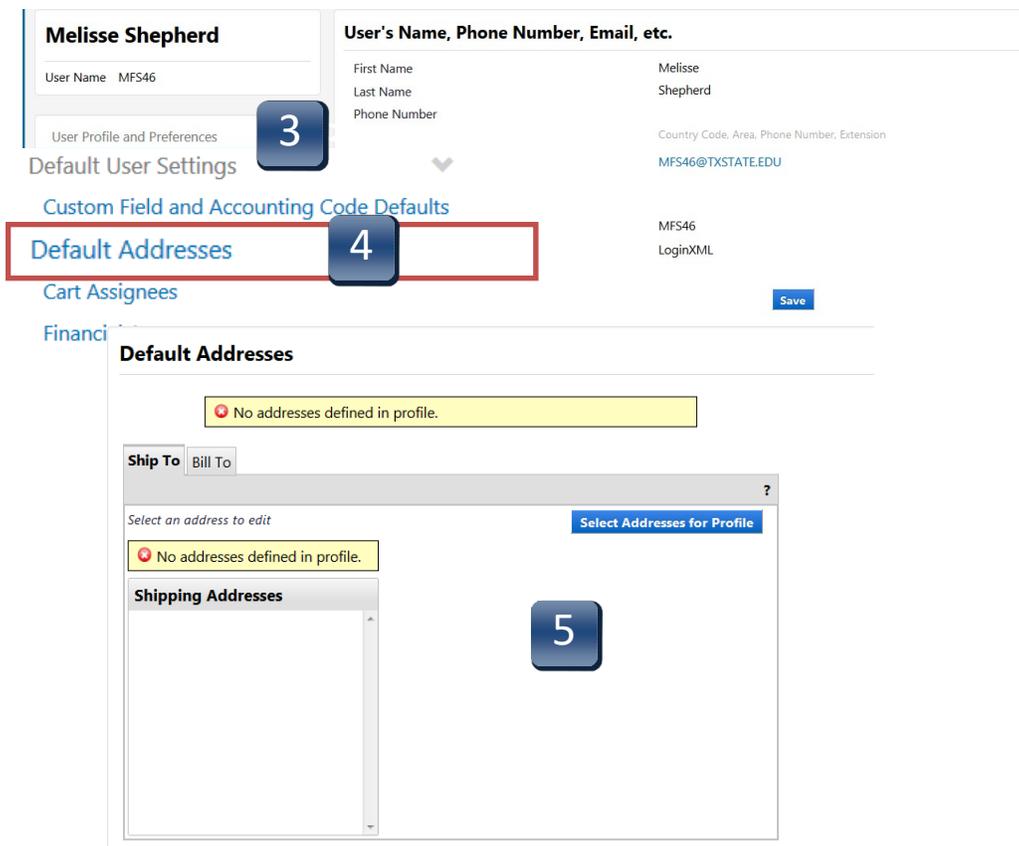
- STEP 8:** Once selected, location will populate the **Nickname** field.
- STEP 9:** Enter your **Room** and **Building**.
- STEP 10:** Click **Save**.
- STEP 11:** Newly saved address will populate **Shipping Addresses** menu.

Shipping Addresses	
UDC	11

Edit Selected Address ?	
Nickname	UDC 8
Default	<input checked="" type="checkbox"/>
Current Default Address	---
ADDRESS	
Contact Line 1	Melisse Shepherd
Room	527 9
Bldg	JCK
Address Line 1	305 River Ridge Pkwy
Address Line 2	University Distribution Center
City	San Marcos
State	TX
Zip Code	78666
Country	United States
Save 10	

System Functions - Profile Setup – Default Billing Address

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Default Addresses**.
- STEP 5:** **Default Address** box appears.



System Functions - Profile Setup – Default Billing Address

- STEP 6:** Under the **Bill To** tab, click Select Addresses for Profile button. The **Select Address Template** window will appear.
- STEP 7:** From **Select Address Template** drop down menu, choose **BillTo**.
Construction is for Facilities only.
- STEP 8:** Once selected, **BillTo** will populate in **Nickname** field.
- STEP 9:** Click **Save**
- STEP 10** Newly saved address will populate in Shipping Addresses menu.

Ship To **Bill To**

Select an address to edit

Billing Addresses

BillTo

Select Address Template

Select Address Template

BillTo

Construction

Select Addresses for Profile

Billing Addresses

BillTo

Edit Selected Address

Nickname BillTo

Default

Current Default Address BillTo

ADDRESS

Contact Line 1 Attn: Invoices

Address Line 1 P.O. Box 747

City San Marcos

State TX

Zip Code 78667-0747

Country United States

Save

System Functions - Profile Setup – Notification Preferences

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. **My Profile** page appears.
- STEP 3:** Select **Notification Preferences**
- STEP 4:** **Notification Preferences** section is categorized by notification type, e.g. Administration & Integration, Shopping, Carts & Requisitions, Purchase Orders, etc.

The screenshot shows the TSUS Marketplace user interface. At the top right, the user's name 'Melisse Shepherd' is displayed with a dropdown arrow (Step 1). A 'View My Profile' button is highlighted with a red box and a '2' in a blue circle (Step 2). Below this, the 'User's Name, Phone Number, Email, etc.' section is visible, containing fields for First Name (Melisse), Last Name (Shepherd), Phone Number, E-mail Address (MFS46@TXSTATE.EDU), Department, User Name (MFS46), and Authentication Method (LoginXML). A 'Save' button is located at the bottom of this section. On the left side, a navigation menu is shown with 'Notification Preferences' highlighted (Step 3). A red box highlights the 'Notification Preferences' section, and a '4' in a blue circle points to the 'Administration & Integration' link within this section (Step 4).

System Functions - Profile Setup – Notification Preferences

STEP 5: Once you have selected which category you want to edit, click on **Edit Section**.

STEP 6: Select **Override** from each function and use the drop-down to select email & notification. By selecting Email & Notification, you will receive alerts within TSUS Marketplace as well as an email when this workflow step has been completed.

We recommend the following:

Shopping, Carts & Requisitions

1. Assigned Cart Processed
2. PR Workflow complete/ PO Created
3. Cart/ PR rejected/ Returned
4. PR submitted into Workflow
5. For Approvers: PO Pending Workflow approval

Purchase Orders

1. PO rejected

STEP 7 Scroll down to bottom of list and click **Save**.

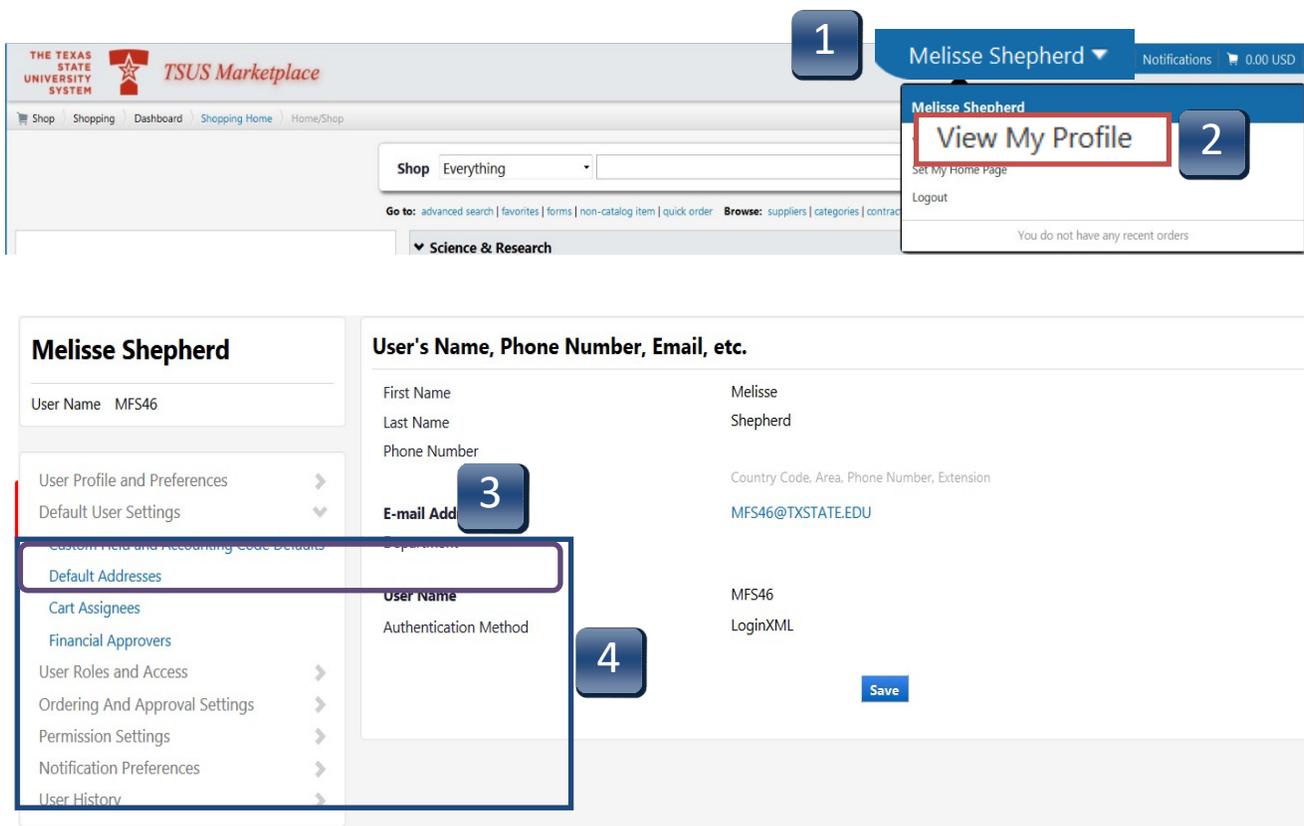
Notification Preferences: Shopping, Carts & Requisitions

Assigned Cart Processed Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Assigned Cart Deleted Notification	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR submitted into Workflow	<input type="radio"/> Default <input checked="" type="radio"/> Override	None
PR pending Workflow approval	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow Notification available	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR Workflow complete / PO created	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
PR line item(s) rejected	<input checked="" type="radio"/> Default <input type="radio"/> Override	None
Cart/PR rejected/returned	<input checked="" type="radio"/> Default <input type="radio"/> Override	None

Buttons: Save, Save Changes

System Functions - Profile Setup - Default Funding

- STEP 1:** Select **your name** in the top right corner of the TSUS Marketplace home page.
- STEP 2:** Select **View My Profile**. My Profile page appears.
- STEP 3:** Select **Default User Settings**.
- STEP 4:** Select **Custom Field and Accounting Code Defaults**.
- STEP 5:** **Custom Field and Accounting Code Defaults** code tabs appear.



Custom Field and Accounting Code Defaults

Header (int.)		Codes	Code Favorites
Custom Field Name	Default Value	Description	Edit Values

System Functions - Profile Setup - Default Funding

STEP 6: Select **Codes** tab.

STEP 7: To set a default or favorite value, select the **Edit** button in the **Edit Values** column for the **Custom Field Name** you want to change. The next pages will show you how to set up the below outlined fields.

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit
Asset	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Storage Location	No Default Value		Edit

Once default settings have been saved, the Codes tab should reflect them.

System Functions - Profile Setup – Default Funding

ACCOUNT ASSIGNMENT CATEGORY

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Account Assignment** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

STEP 2: Click on the **Create New Value** button.

STEP 3: Make selections according to your funding type.

(A, F, K, or S--Do not use P/WBS)

Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as the default.

STEP 4: Click **Add Values**. Value is added to the table.

The screenshot shows the 'Codes' configuration page. At the top, there are tabs for 'Header (int.)', 'Codes', and 'Code Favorites'. Below the tabs is a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The table contains one row: 'Account Assignment Category' with 'No Default Value' and an 'Edit' button. Below the table is an 'Edit Values' section with a 'Close' button. On the left, there is a 'Create New Value' button (labeled 2) and a list of values (labeled 4) with columns 'Value' and 'Description'. The list contains one entry: 'K' with 'Cost Center'. Below the list is a note: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.' On the right, there is a 'Values' section (labeled 3) with a table of values and an 'Add Values' button (labeled 4). The table has columns 'Value' and 'Description' and contains five entries: 'A' (Asset), 'F' (Internal Order), 'K' (Cost Center), 'P' (WBS), and 'S' (Statistical Internal Order). The 'K' entry is selected with a checkmark.

Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit

Edit Values Close

Create New Value 2

Value	Description
K	Cost Center

4

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Values ?

Value	Description
<input type="checkbox"/>	A Asset
<input type="checkbox"/>	F Internal Order
<input checked="" type="checkbox"/>	K Cost Center
<input type="checkbox"/>	P WBS
<input type="checkbox"/>	S Statistical Internal Order

Add Values 4

System Functions - Profile Setup – Default Funding

- STEP 5:** Click on the Description of the value you added to the table.
Edit Existing Value menu appears.
- STEP 6:** Check the **Default** box to set this value as the default for this field.
- STEP 7:** Click **Save**. New default value has been saved.
- STEP 8:** Click **Close** to return to Codes tab screen.

Account Assignment Category: No Default Value

Edit

Edit Values

Create New Value

Value	Description
K	Cost Center

5

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Edit Existing Value ?

Value: K

Description: Cost Center

Default: 6

Status: active

Save 7 Remove

Close 8

System Functions - Profile Setup – Default Funding

FUND

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Fund** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) **Codes** Code Favorites ?

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 3:** If known, enter **Fund** number in the **Value** field and click **Search**. If unknown, click **Search**.
- STEP 4:** Select your fund. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 5:** Click **Add Values**. Value is added to table.

The screenshot shows the 'Custom Field Name' table and the 'Search For Value' dialog box. The table has columns for 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The 'Fund' row is highlighted in yellow, with 'No Default Value' in the 'Default Value' column and an 'Edit' button in the 'Edit Values' column. Below the table is an 'Edit Values' section with a pencil icon and a 'Close' button. A 'Create New Value' button is highlighted with a blue box and a '2' callout. The 'Search For Value' dialog box is open, showing 'Field Name' as 'Fund', 'Value' as '2000011020' (with a '3' callout), and 'Description' as an empty field. The 'Results Per Page' is set to '5'. A 'Search' button is highlighted with a blue box and a '3' callout. Below the dialog box is a 'Results' section showing 'Values Found' as '1' and 'Page 1 of 1'. A table lists the results with columns for 'Select', 'Value', and 'Description'. The first row has a checked 'Select' box, '2000011020' in the 'Value' column, and 'Des Method' in the 'Description' column. An 'Add Values' button is highlighted with a blue box and a '4' callout, and a 'Back to Search' button is also visible. A '5' callout points to the 'Add Values' button. A note at the bottom left states: '* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.'

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Edit Values Close

Create New Value 2

Value Description

2000011020	Des Method
------------	------------

5

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Search For Value ?

Field Name Fund

Value 2000011020 3

Description

Results Per Page 5

Search 3

Results Values Found Page 1 of 1 ?

Per Page 5

Select	Value	Description
<input checked="" type="checkbox"/>	2000011020	Des Method

Add Values 4 **Back to Search**

5

System Functions - Profile Setup – Default Funding

- STEP 6:** Click the Description of the value you added to the table. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit

Edit Values Close

Create New Value

Value	Description
2000011020	Des Method

6

Edit Existing Value

Value: 2000011020

Description: Des Method

Default: 7

Status: active

Save Remove

8

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

9

System Functions - Profile Setup – Default Funding

COST CENTER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Cost Center** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
└ Cost Center		No Default Value	Edit
└ Internal Order		No Default Value	Edit
└ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 3:** Click on the **Create New Value** button. The **New Value** box appears.
- STEP 4:** Enter Cost Center into the **Value** field in the New Value menu. Check the **Default** box to set this number as the default value for this field. Only one number can be selected as the Default. If you want to type in multiple cost center numbers, proceed to **Step 2** the repeat the above steps for each value.
- STEP 5:** Click **Save**. Value is added to table.
- STEP 6:** Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Cost Center	1410140000	Procurement	<input type="button" value="Edit"/>

 Edit Values

Fund 2

3

Value	Description
1410140000	Procurement

5

Edit Existing Value ?

Value 4

Description

Default

Status

5

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

System Functions - Profile Setup – Default Funding

- STEP 7:** If Cost Center is unknown, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 8:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 9:** Check the **Default** box to set this number as the default value for this field.
- STEP 10:** Click **Save**. New default value has been added.
- STEP 11:** Click **Close** to return to Codes tab screen.

The first screenshot shows the 'Search For Value' dialog box. The 'Field Name' is set to 'Cost Center'. There are input fields for 'Value' and 'Description'. The 'Results Per Page' is set to 5. A blue box highlights the 'Search' button, and a blue circle with the number 7 is next to it.

The second screenshot shows the 'Results' dialog box. It displays 'Values Found' as 1 on 'Page 1 of 1'. Below this is a table with columns 'Value' and 'Description'. One row is visible: '1410140000 Procurement'. A checkbox is checked next to the value. A blue box highlights the 'Add Values' button, and a blue circle with the number 7 is next to it.

The screenshot shows the 'Edit Existing Value' dialog box. At the top is a table with the following data:

Custom Field Name	Default Value	Description	Edit Values
Cost Center	No Default Value		Edit

Below the table is a 'Close' button. The 'Edit Existing Value' section contains the following fields:

- Value: 1410140000
- Description: Procurement
- Default:
- Status: active

A blue box highlights the 'Save' button, and a blue circle with the number 10 is next to it. A blue circle with the number 8 is next to the 'Procurement' description in the table below.

System Functions - Profile Setup – Default Funding

INTERNAL ORDER/GRANT/STATISTICAL ORDER

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Internal Order** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Header (int.) Codes Code Favorites ?			
Custom Field Name	Default Value	Description	Edit Values
Fund		No Default Value	Edit
└ Cost Center		No Default Value	Edit
└ Internal Order		No Default Value	Edit
└ WBS Element		No Default Value	Edit
G/L Account		No Default Value	Edit
Asset		No Default Value	Edit
Storage Location		No Default Value	Edit
Asset Sub-Number		No Default Value	Edit
Account Assignment Category		No Default Value	Edit
PO Type	BC	Bobcatalog Local	Edit
Limit		No Default Value	Edit
Expected Value		No Default Value	Edit
Overall Limit		No Default Value	Edit
Valid Start Date (Enter MMDDYYYY)		No Default Value	Edit
Valid End Date (Enter MMDDYYYY)		No Default Value	Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** If you have added multiple funds, select your fund from the drop-down menu. Adding multiple values will generate a drop-down selection list when creating requisitions. Only one value can be selected as Default.
- STEP 3:** Click on the **Create New Value** button. The **Search For Value** box appears.
- STEP 4:** Type Internal Order into the **Value** field in the **Search For Value** box and click **Search**. If unknown, or you will be entering multiple values, leave the Value field blank and click **Search**. Values selection menu appears.
- STEP 5:** Select your Internal Order. Select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.

Custom Field Name	Default Value	Description	Edit Values
Internal Order	No Default Value		Edit

Edit Values Close

Fund: 2000011020 2

Create New Value 3

Value	Description
5100000009	SPF - Football

5

* Custom Field Values

Search For Value ?

Field Name: Internal Order

Value: 5100000009 4

Description:

Results Per Page: 5

4 **Search**

Results Values Found: 1 Page 1 of 1 ?

Select	Value	Description
<input checked="" type="checkbox"/>	5100000009	SPF - Football

5 **Add Values** Back to Search

System Functions - Profile Setup – Default Funding

- STEP 6:** To set a default Internal Order, click on the Description of the value you wish to make Default. **Edit Existing Value** menu appears.
- STEP 7:** Check the **Default** box to set this number as the default value for this field.
- STEP 8:** Click **Save**. New default value has been saved.
- STEP 9:** Click **Close** to return to Codes tab screen.

The screenshot shows the 'Internal Order' profile setup interface. At the top, there is a tab labeled 'Internal Order' and a yellow banner indicating 'No Default Value'. An 'Edit' button is visible in the top right corner. Below the banner, there is a section titled 'Edit Values' with a 'Fund' dropdown menu set to '2000011020' and a 'Create New Value' button. A table lists values with columns 'Value' and 'Description'. The first row is highlighted with a blue background and a circled '6' next to it:

Value	Description
5100000009	SPF - Football

Below the table, there is a note: '* Custom Field Values marked'. To the right of the table, there is a dialog box titled 'Edit Existing Value' with a question mark icon. It contains the following fields:

- Value: 5100000009
- Description: SPF - Football
- Default: (with a circled '7' next to it)
- Status: active

At the bottom of the dialog, there is a 'Save' button (with a circled '8' next to it) and a 'Close' button (with a circled '9' next to it).

System Functions - Profile Setup – Default Funding

G/L ACCOUNT

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **G/L Account** value. Values selection menu appears.

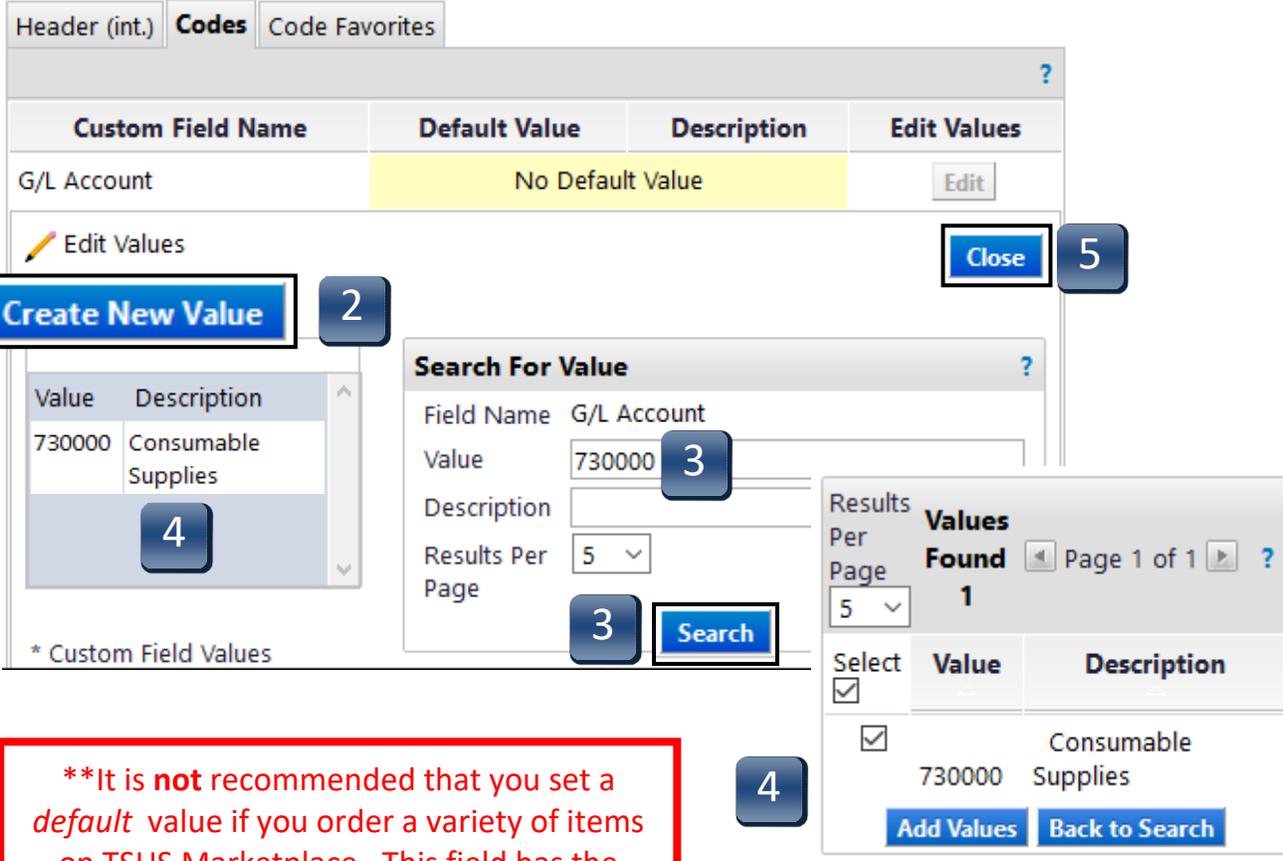
Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** Select **Create New Value**. **Search For Value** menu appears.
- STEP 3:** Type a G/L code into the **Value** field and click **Search**.
If unknown, or you will be entering multiple values, leave the **Value** field blank and click **Search**. Values selection menu appears.
- STEP 4:** Select your G/L code. Select multiple values to generate a drop-down selection list when creating requisitions. If you choose to have a default G/L, click the Default check box. You can also select multiple values to generate a drop-down selection list when creating requisitions. Click **Add Values**. Value(s) are added to the table.
- STEP 5:** Click **Close** to return to Code tabs screen.



Header (int.) Codes Code Favorites

Custom Field Name	Default Value	Description	Edit Values
G/L Account	No Default Value		Edit

Edit Values **Close** 5

Create New Value 2

Search For Value

Field Name G/L Account
Value 730000 3
Description
Results Per Page 5
Search 3

Value Description
730000 Consumable Supplies
4

* Custom Field Values

Results Per Page 5 Values Found 1 Page 1 of 1 ?
Select Value Description
 730000 Consumable Supplies
Add Values **Back to Search** 4

****It is not recommended that you set a default value if you order a variety of items on TSUS Marketplace. This field has the potential to change with every purchase.****

System Functions - Profile Setup – Default Funding

STORAGE LOCATION

STEP 1: On the **Codes** tab, click on the **Edit** button to the right of the **Storage Location** value. Values selection menu appears.

Custom Field and Accounting Code Defaults

Custom Field Name	Default Value	Description	Edit Values
Fund	No Default Value		Edit
└ Cost Center	No Default Value		Edit
└ Internal Order	No Default Value		Edit
└ WBS Element	No Default Value		Edit
G/L Account	No Default Value		Edit
Asset	No Default Value		Edit
Storage Location	No Default Value		Edit
Asset Sub-Number	No Default Value		Edit
Account Assignment Category	No Default Value		Edit
PO Type	BC	Bobcatalog Local	Edit
Limit	No Default Value		Edit
Expected Value	No Default Value		Edit
Overall Limit	No Default Value		Edit
Valid Start Date (Enter MMDDYYYY)	No Default Value		Edit
Valid End Date (Enter MMDDYYYY)	No Default Value		Edit
Purchasing Group	CPO	Central Purchasing Office	Edit

1

System Functions - Profile Setup – Default Funding

- STEP 2:** Select **Create New Value**. **Search for Value** menu appears.
- STEP 3:** Type a Storage Location code into the **Value** field.
- STEP 4:** If you want this value to be the default value, check the **Default** box.
- STEP 5:** Click **Save**. Value added to the table. Click **Close** to return to Codes tab screen.

Custom Field Name	Default Value	Description	Edit Values
Storage Location	JCKP	Purchasing	Edit

Edit Values Close 5

Create New Value 2

Value	Description
JCKP	Purchasing

5

* Custom Field Values marked

Edit Existing Value ?

Value: JCKP 3

Description: Purchasing 3

Default: 4

Status: active

Save 5

System Functions - Profile Setup – Default Funding

- STEP 6:** If **Storage Location** is unknown, or you will be entering multiple values, click **Search** from the **Search for Value** menu, make selections, then click on the **Add Values** button. Select multiple values to generate a drop-down selection list when creating requisitions.
- STEP 7:** To designate a **Default** value when using the **Search for Value**, click the description of the value you wish to make the default. **Edit Existing Value** menu appears.
- STEP 8:** Check the **Default** box to set this number as the default value for this field.
- STEP 9:** Click **Save**. New default value has been added.
- STEP 10:** Click **Close** to return to Codes tab screen.

Search For Value

Field Name: Storage Location

Value:

Description:

Results Per Page: 5

Search 6

Select	Value	Description
<input type="checkbox"/>	JCKM	Tech Resources Business Services
<input type="checkbox"/>	JCKN	JCK 860 -University Marketing
<input type="checkbox"/>	JCKO	Audit and Compliance
<input checked="" type="checkbox"/>	JCKP	Purchasing
<input type="checkbox"/>	JCKQ	JCK 860 University News Service

Results Per Page: 5 Page 28 of 53

Storage Location: No Default Value **Edit**

Edit Values **Close** 10

Create New Value

Value	Description
JCKP	Purchasing

7

Edit Existing Value ?

Value: JCKP

Description: Purchasing

Default: 8

Status: active

Save 9

* Custom Field Values marked

Vendor Verification Requirements – Before a Requisition is Created

Once you determine the vendor, the vendor is required by federal and state governments, to be checked to determine if there are any sanctions or debarments that would prohibit the university from doing business with them for **ALL** purchases \$15,000 and above. The sites are:

<https://mycpa.cpa.state.tx.us/coa/> – Franchise Tax

<https://sam.gov/SAM/> - SAM – Federal Debarment

<https://fmcpa.cpa.state.tx.us/tpis/> – Vendor Warrant/Payment Hold

<https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php> – State of Texas Debarment

<https://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx> – The is OFAC

<https://comptroller.texas.gov/purchasing/publications/divestment.php> –This is the Comptroller site that has all the links except OFAC

All documentation from the sites verifying they have been checked must be attached to the requisition

See **Internal** Notes and Attachments section. These documents are not added to the External Notes and Attachments.

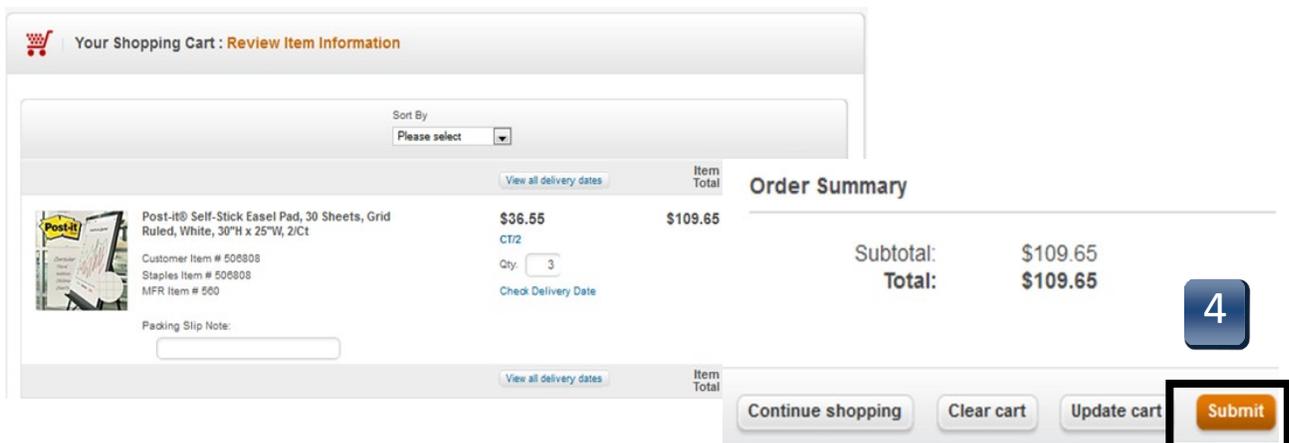
Search & Order - Punch-Out Vendors

STEP 1: Click selected supplier's catalog button. You will be taken to the supplier's "punch-out" site. Navigation on each supplier's catalog will vary. All Punch-Outs have a small icon in the top right corner.
To *cancel* a Punch-Out, select **Cancel Punch-Out button at the top of the screen.

STEP 2: Select your items by entering **quantity** desired, then click **Add to Cart**.

STEP 3: Click **Checkout**.

STEP 4: Review order, then click **Submit**.



Search & Order - Punch-Out Vendors

STEP 5: Cart returns to **TSUS Marketplace**

STEP 6: Based on your assigned role, Select **Proceed to Checkout** or **Assign Cart**.

The screenshot shows the Bobcat Catalog Texas State University shopping cart interface. The cart contains one item: Post-it Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30\"H x 25\"W, 2/Ct. The total price is 109.65 USD. The interface includes a navigation bar with the user's name (Brittany Baker), a search bar, and a cart icon showing 109.65 USD. The cart summary shows 3 item(s) for a total of 109.65 USD, with a subtotal of 109.65 USD and estimated tax, shipping & handling of 0.00 USD. The interface also includes a 'Proceed to Checkout' or 'Assign Cart' button, a 'Continue Shopping' button, and a 'Logout' button. The item details table is as follows:

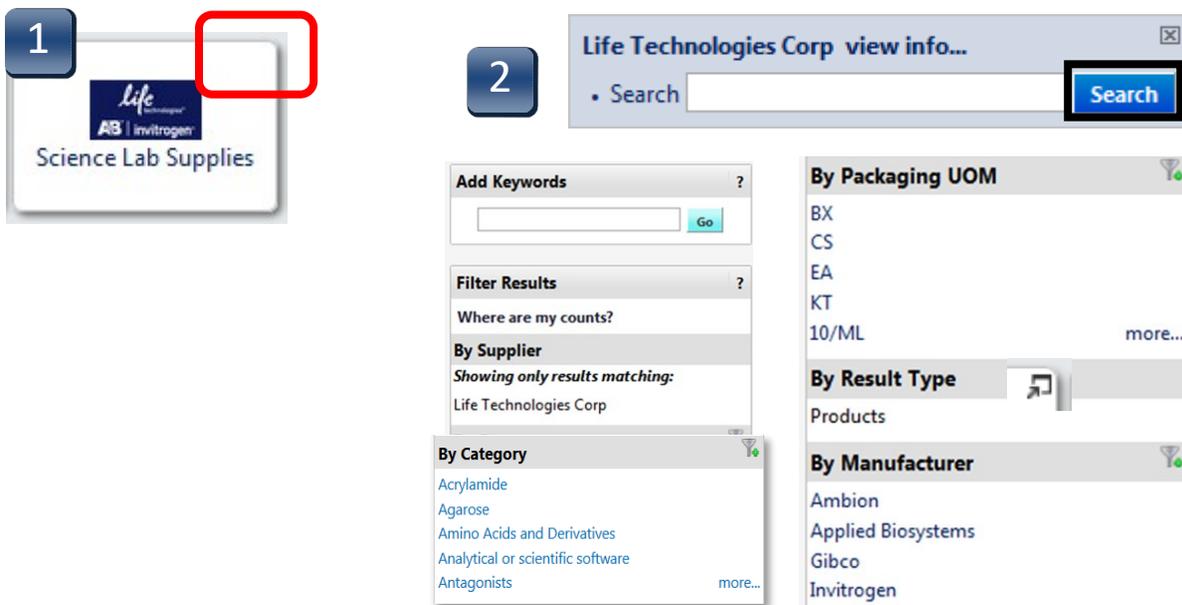
Product Description	Unit Price	Quantity	Total
Item added on Dec 17, 2013 Post-it Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30\"H x 25\"W, 2/Ct	36.55 USD	3	109.65 USD
Part Number: 506808	CT		
Manufacturer Info: 560 - (3M Corporation)			
Commodity Code: Office Equipment and Supplies			

Search & Order - Hosted Vendors

STEP 1: Click supplier's catalog button.
**Hosted suppliers do not have an icon in the top right corner.

STEP 2: Search via stock/item number or search by category filters. Leave Search field blank and simply click **Search** to filter by category.

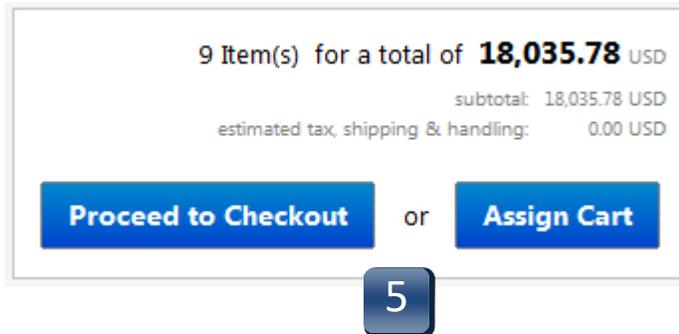
STEP 3: Enter **quantity** desired, then press **Add to Cart**.



Search & Order - Hosted Vendors

STEP 4: After all items are added, click on the link that says _____item(s) added, view cart.

STEP 5: Based on your assigned role, click on **Proceed to Checkout** or **Assign Cart**.



Create a Non-Catalog Requisition

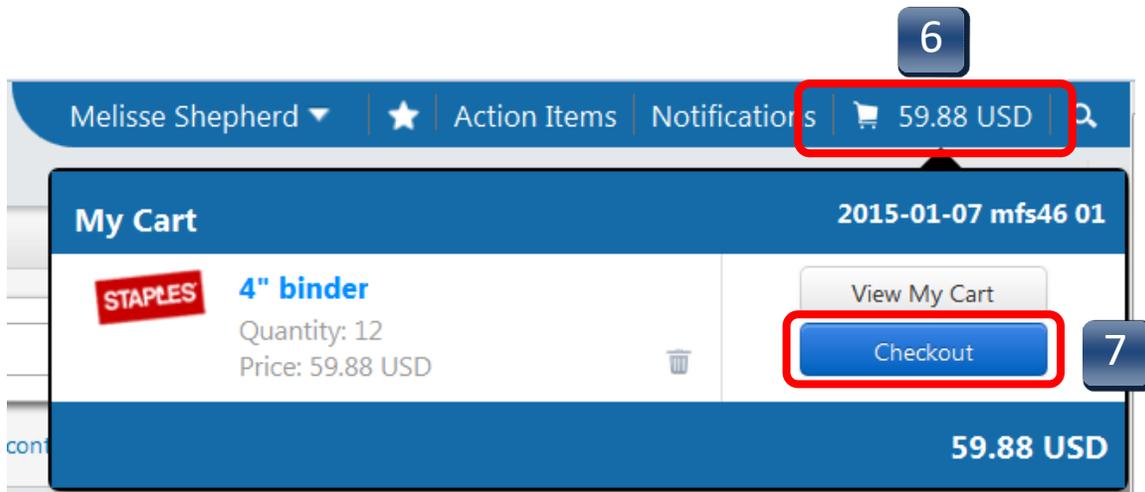
- STEP 1:** Click on the **Non-Catalog item** hyperlink menu.
- STEP 2:** Enter **Supplier**.
- STEP 3:** Enter Product Description, Catalog #, Quantity, Price Estimate, & Packaging fields. If you do not have a **catalog number**, leave this field blank.
- STEP 4:** Leave all special restrictions blank. The GL used will populate this section. **No entry is need by the user.**
- STEP 5:** Once the form is filled out, select one of the following actions:
- A. To add another line for the same supplier, click **Save and Add Another**. Once you have added all line items, click **Save and Close**. Click on the **Cart** icon from the top banner in the right corner to access the quick view cart.
 - B. If you are finished adding lines, click **Save and Close** to add the data to your current cart. Click on the Cart icon from the top banner in the right corner to access the quick view **cart** with the ability to checkout from there.

The screenshot shows the 'Non-Catalog Item' form interface. At the top, a navigation bar includes a search box with 'Everything' selected, a 'Go' button, and an 'advanced search' link. Below this, a breadcrumb trail shows 'non-catalog item' highlighted with a red box and a red arrow pointing to it. The main form area is titled 'Non-Catalog Item' and contains several sections:

- Enter Supplier:** A text input field with a blue callout '2' next to it.
- Product Description:** A table with columns for 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. A blue callout '3' is positioned to the right of the table.
- Product Details:** A list of checkboxes for special restrictions: Controlled substance, Recycled, Hazardous material, Radioactive, Rad Minor, Select Agent, Toxin, Energy Star, and Green. A blue callout '4' is positioned to the right of this list.
- Bottom Bar:** A blue bar with a shopping cart icon circled in red, showing '000 USD'. A blue callout '5B' is next to the cart icon.
- Bottom Right:** Two buttons: 'Save and Close' (with a blue callout '5B' to its left) and 'Save and Add Another' (with a blue callout '5A' to its right).

Create a Non-Catalog Requisition

- STEP 6:** Access your newly created cart from the top banner quick view.
- STEP 7:** If you are ready to checkout, click on the **Checkout** button and complete the Checkout process. (See **Completing the Checkout Process** section of this user guide)



Completing the Checkout Process

Based on your assigned role, you will select:
Proceed to Checkout (Requisitioner)
or
Assign Cart (Shopper)

Shopping Cart for Melisse Shepherd

Continue Shopping

3 Item(s) for a total of **109.65 USD**
subtotal: 109.65 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or **Assign Cart**

Name this cart:

Have you made changes?

STAPLES Staples/Summus

The item(s) in this group was retrieved from the supplier's website. What does this mean?

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 6/26/2013 11:25:40 AM

Line(s): 1

Product Description	Unit Price	Quantity	Total
Post-it Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30" H x 25"W, 2/Ct	36.55 USD	3	109.65 USD
Part Number: 506808	CT		
Manufacturer Info: 560 - (3M Corporation)			
Commodity Code: <input type="text" value="Office Equipment and"/>			

Completing the Checkout Process – General Tab

Once Place Order has been selected, you are taken to the Final Review workflow. Any tabs with a red triangle require additional information to complete.

- STEP 1:** Be aware of any alerts on any of the check-out tabs. A box will display a message if there are any errors and if they are critical stops and the information needs to be entered before you can proceed or the message is a warning and you can proceed with the next step without corrective action.
- STEP 2:** If the message is a warning, you can enter in the information if you choose. Click on the **edit** button to edit the cart information. You can change the Cart Name, Description, Priority, and Prepared For fields, in case you are submitting this cart for someone else. Once the information has been entered, click **Save**.

The screenshot displays the checkout process interface. At the top, a navigation bar shows tabs: General (checked), Shipping (warning), Billing (warning), Accounting Codes (warning), Internal Notes and Attachments (checked), External Notes and Attachments (checked), Purchasing Use Only (checked), and Final Review (warning). A yellow message box contains the following text: "You have completed the required information in this step. At this point, you can do the following: Proceed to the next step: Shipping. Go straight to the end: Final Review." Below this, a red-bordered box highlights a warning: "You need to be aware of the following issue(s), but it will not prevent you from submitting your request." with a sub-item "Empty field: Description". A blue box with the number "1" is next to the warning. Below the message box, a navigation bar shows tabs: Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. Underneath, a sub-navigation bar shows: Summary, Shipping, Billing, Accounting Codes, Supplier Info, and Taxes/S&H. The main content area is divided into two panels. The left panel, titled "General", shows fields for Cart Name (2020-01-30 jn11 01), Description (no value), Priority (Normal), Prepared by (Judi Nicholson), and Prepared for (Judi Nicholson). An "edit" button is next to the Cart Name field, and a blue box with the number "2" is next to the Prepared by field. The right panel, also titled "General", shows fields for Cart Name (2020-01-29 jn11 01), Description (Empty field), Priority (Normal), Prepared by (Judi Nicholson), and Prepared for (Judi Nicholson). A "Save" button is highlighted with a red box, and a "Cancel" button is next to it.

Completing the Checkout Process – Shipping Tab

STEP 1: Click **Required field** in the Shipping box to insert address.

STEP 2: Click on **select from org addresses** and select your Shipping Address from the drop-down-menu. **UDC** is the standard org address for most departments.

Additional org addresses can be selected by following the **select from org addresses link. You can either enter a nickname/address or click on **Search**. Select your address from the drop-down menu.

**If you have designated a list of favorite/default Ship To addresses when setting up defaults in your profile you will only see those in the drop-down menu.

STEP 3: Enter contact information in **Address Details** fields.

STEP 4: Click **Save**.

The screenshot shows the 'Shipping' tab in a procurement system. At the top, a navigation bar includes 'Shipping', 'Billing', 'Accounting Codes', 'Internal Notes and Attachments', 'External Notes and Attachments', 'Purchasing Use Only', and 'Final Review'. A yellow warning banner states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' with a bullet point: 'Required field: Shipping address'. Below this are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. The 'Shipping' tab is active, showing sub-tabs for 'Summary', 'Shipping', 'Billing', 'Accounting Codes', 'Supplier Info', and 'Taxes/S&H'. A 'Ship To' dialog box is open, displaying 'No User Addresses' and a 'Shipping address' field with a 'select from org addresses' link. A 'Shipping' dialog box is also open, showing 'Shipping address' with a 'Required field' error and an 'edit' button. An 'Address Search' dialog box is open, showing a search input field and a 'Search' button. A 'Ship To' dialog box is open, showing 'Address Details' with fields for 'Contact Line 1 *', 'Room *', 'Bldg *', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip Code', and 'Country'. The 'Save' button is highlighted. Numbered callouts 1-4 are placed over the 'Required field' error, the 'select from org addresses' link, the 'Address Details' fields, and the 'Save' button respectively.

To designate a default **Shipping Address**, see **Profile Setup**

Completing the Checkout Process – Billing Tab

STEP 1: Click **Required field** in the Billing box.

Step 2: Click on the down arrow and select **BillTo**.

STEP 3: Click **Save**.

General Shipping **Billing** Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Final Review

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Billing address

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping **Billing** Accounting Codes Supplier Info Taxes/S&H

Billing

These values apply to all lines unless specified by line item

Bill To

Billing address

Required field 1

no value

Complete the fields below to enter your billing address for this order. If you need to make a change, select a different address from the available options.

Billing address

select from org addresses

BillTo

Construction

Bill To

Complete the fields below to enter your billing address for this order. If you need to make a change, select a different address from the available options.

Billing address

select from org addresses

BillTo

Address Details

Contact Line 1	Attn: Invoices
Address Line 1	P.O. Box 747
City	San Marcos
State	TX
Zip Code	78667-0747
Country	United States

Save this address for future use

Save 3

To designate a default **Billing Address**, see **Profile Setup** section.

Completing the Checkout Process – Accounting Codes Tab

ASSET



Accounting Codes is the most important section in the checkout process!

- STEP 1:** Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.
- STEP 2:** Type **A** in **Account Assignment Category** field. Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.
- STEP 3:** Click **Save**.
- STEP 4:** Click **Required field** under **Fund**. Accounting Codes menu opens. Proceed to next page to complete entry.

The screenshot displays the 'Accounting Codes' tab in a software interface. At the top, a navigation bar includes tabs for 'General', 'Shipping', 'Billing', 'Accounting Codes' (highlighted), 'Internal Notes and Attachments', 'External Notes and Attachments', 'Purchasing Use Only', and 'Final Review'. Below the navigation bar, a yellow warning box states: 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' It lists four required fields: 'Account Assignment Category', 'Fund', 'G/L Account', and 'Storage Location'.

The 'Other Information' section is divided into two parts. The first part shows the 'Account Assignment Category' and 'Storage Location' fields. Both fields have a 'Required field' indicator (a red circle with a white 'x') and a 'Select from all values...' dropdown menu. A blue box with the number '1' is placed over the 'Required field' indicator for the 'Account Assignment Category' field.

The second part of the 'Other Information' section shows the 'Account Assignment Category' field with the value 'A' entered. The 'Storage Location' field has the value 'JCKP' entered. Both fields have a 'Required field' indicator and a 'Select from all values...' dropdown menu. A blue box with the number '2' is placed over the 'Required field' indicator for the 'Account Assignment Category' field, and another blue box with the number '2' is placed over the 'Required field' indicator for the 'Storage Location' field. A blue box with the number '3' is placed over the 'Save' button, which is highlighted in blue.

The bottom part of the form shows the 'Fund' field with a 'Required field' indicator and a blue box with the number '4' placed over it. The 'Cost Center', 'Internal Order', and 'WBS Element' fields all have the value 'no value' entered. The 'G/L Account' field has a 'Required field' indicator and a 'no value' entry.

Completing the Checkout Process – Accounting Codes Tab

ASSET



Accounting Codes is the most important section in the checkout process!

STEP 5: Type in the appropriate **Fund** or select from defaulted profile values, or select from all values list.

STEP 6: Type in the appropriate **G/L** number, select from defaulted profile values, or select from all values list.

****Correct G/L *must* be entered to generate Asset Review workflow where Materials Management will add the Asset number. Use the [GL/Asset Reference guide](#) if necessary.**

STEP 7: Based on Funding, enter either **Cost Center** or **Internal Order** number.

STEP 8: Click **Save**.

The screenshot shows the 'Accounting Codes' form with the following fields and callouts:

- 5:** Fund field containing '2000011020'.
- 7:** Cost Center field containing '1410140000'.
- 6:** G/L Account field containing '737800'.
- 8:** Save button.

Asset GL Codes	
737800	Computers
737800	Printers
737800	iPads/Tablets, Smartphones
737400	TVs
737400	Cameras, Camcorders

See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

COST CENTER



Accounting Codes is the most important section in the checkout process!

- STEP 1:** Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.
- STEP 2:** Type **K** in **Account Assignment Category** field.
- STEP 3:** Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.
- STEP 4:** Click **Save**.
- STEP 5:** Click **Required field** under **Fund**. Accounting Codes menu opens. Proceed to next page to complete entry.

Completing the Checkout Process – Accounting Codes Tab

COST CENTER



Accounting Codes is the most important section in the checkout process!

- STEP 6:** Enter **Fund** (Cost Center funds begin with either 1 or 2), select from defaulted profile values, or select from all values list.
- STEP 7:** Enter **Cost Center** number or select from defaulted profile values, or select from all values list.
**Internal Order field should be *blank* when using K as the Account Assignment Category.
- STEP 8:** Type in **G/L** number, select from defaulted profile values, or select from all values list.
- STEP 9:** Click **Save**.

Accounting Codes

Fund: 2000011020 (6) Required field

Cost Center: 1410140000 (7)

Internal Order:

WBS Element:

G/L Account: 730000 (8) Required field

Asset:

Asset Sub-Number:

add split

recalculate / validate

Save Cancel

Save (9)

See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

INTERNAL ORDER



Accounting Codes is the most important section in the checkout process!

- STEP 1:** Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.
- STEP 2:** Type **F** in **Account Assignment Category** field.
- STEP 3:** Enter 4-digit **Storage Location** code, select from defaulted profile values, or select from all values list.
- STEP 4:** Click **Save**.
- STEP 5:** Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.

Other Information

Account Assignment Category

Storage Location

Required field 1

Select from all values... Required field

Save Cancel

Other Information

Account Assignment Category

F 2

JCKP 3

Select from all values... Required field

Select from all values... Required field

Save 4

Fund

Cost Center

Internal Order

WBS Element

G/L Account

Required field 5

no value

no value

no value

no value Required field

Completing the Checkout Process – Accounting Codes Tab

INTERNAL ORDER



Accounting Codes is the most important section in the checkout process!

- STEP 6:** Enter **Fund** (Internal Order funds begin with either 7 or 8.), select from defaulted profile values, or select from all values list.
- STEP 7:** Enter **Internal Order** number, select from defaulted profile values, or select from all values list.
**Cost Center field should be *blank* when using F as the Account Assignment Category.
- STEP 8:** Type in G/L number, select from defaulted profile values, or select from all values list.
- STEP 9:** Click **Save**.

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account
2000011020 Select from all values... Required field		9000001449		730000 Select from all values... Required field

See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

STATISTICAL INTERNAL ORDER



Accounting Codes is the most important section in the checkout process!

- STEP 1:** Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.
- STEP 2:** Type **S** in **Account Assignment Category** field.
- STEP 3:** Enter 4-digit **Storage Location** code, select from favorite/defaulted profile values, or select from master value list.
- STEP 4:** Click **Save**.
- STEP 5:** Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.

Other Information

Account Assignment Category

Storage Location

Required field

1

Select from all values... Required field

Save Cancel

Other Information

Account Assignment Category

S

Select from all values... Required field

2

JCKP

Select from all values... Required field

3

Save

4

Accounting Codes

Fund

Cost Center

Internal Order

WBS Element

G/L Account

Asset

Asset Sub-Number

add split

Required field

5

Select from all values... Required field

recalculate / validate

Save Cancel

Completing the Checkout Process – Accounting Codes Tab

STATISTICAL INTERNAL ORDER



Accounting Codes is the most important section in the checkout process!

- STEP 6:** Enter **Fund**, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.
- STEP 7:** Enter **Cost Center**, select from favorite/defaulted profile values, or select from master value list.
- STEP 8:** Enter the **Statistical Internal Order** number in the **Internal Order** field, select from favorite/defaulted profile values, or select from master value list.
- STEP 9:** Enter the **G/L** number, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list
- STEP 10:** Click **Save**.

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account
2000011020 Select from all values... Required field	1410140000	5100000005		730000 Select from all values... Required field

Save

funding. See Multiple Funding section for instructions on splitting line item funding.

Completing the Checkout Process – Accounting Codes Tab

GRANTS



Accounting Codes is the most important section in the checkout process!

- STEP 1:** Click **Required field** in the Account Assignment Category field. **Other Information** menu appears.
- STEP 2:** Type **F** in **Account Assignment Category** field.
- STEP 3:** Enter 4-digit **Storage Location** code, select from favorite/defaulted profile values, or select from master value list.
- STEP 4:** Click **Save**.
- STEP 5:** Click **Required field** under Fund. Accounting Codes menu opens. Proceed to next page to complete entry.

The screenshot shows the 'Other Information' section of a checkout process. The 'Account Assignment Category' field is highlighted in yellow and contains a red 'Required field' error icon. A blue box with the number '1' is placed over this field. To the right, the 'Storage Location' dropdown menu is open, showing 'Select from all values...' and a red 'Required field' error icon. A blue box with the number '3' is placed over this dropdown. At the bottom right, there are 'Save' and 'Cancel' buttons. A blue box with the number '4' is placed over the 'Save' button.

The screenshot shows the 'Other Information' section. The 'Account Assignment Category' field now contains the letter 'F' and has a blue box with the number '2' over it. The 'Storage Location' dropdown menu is closed and shows 'JCKP' as the selected value, with a blue box with the number '3' over it. At the bottom right, the 'Save' button is highlighted with a blue box with the number '4' over it.

The screenshot shows the 'Accounting Codes' section. The 'Fund' field is highlighted in yellow and contains a red 'Required field' error icon. A blue box with the number '5' is placed over this field. To the right, the 'G/L Account' dropdown menu is open, showing 'Select from all values...' and a red 'Required field' error icon. At the bottom right, there are 'Save' and 'Cancel' buttons. A blue box with the number '4' is placed over the 'Save' button.

Completing the Checkout Process – Accounting Codes Tab

GRANTS



Accounting Codes is the most important section in the checkout process!

- STEP 6:** Enter **Fund**, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.
- STEP 7:** Enter the **Grant** number in the **Internal Order** field, select from favorite/defaulted profile values, or select from master value list.
- STEP 8:** Enter the **G/L** number, select from defaulted profile values, select from favorite/defaulted profile values, or select from master value list.
- STEP 9:** Click **Save**.

Fund	Cost Center	Internal Order	WBS Element	G/L Account
2000011020 Select from all values... Required field		8000002409		730000 Select from all values... Required field
				<input type="button" value="Save"/> <input type="button" value="Cancel"/>

See **Multiple Funding** section for instructions on splitting line item

Completing the Checkout Process – Internal Notes and Attachments

STEP 1: Click on **Internal Notes and Attachments** or **Internal Notes and Attachments** tabs. This is optional.

****Internal attachments are NOT seen by the vendor. Use Internal for attachments for Purchasing or Accounts Payable offices, e.g. Sole Source/Proprietary form, Bids, Quotes, Proposals.**

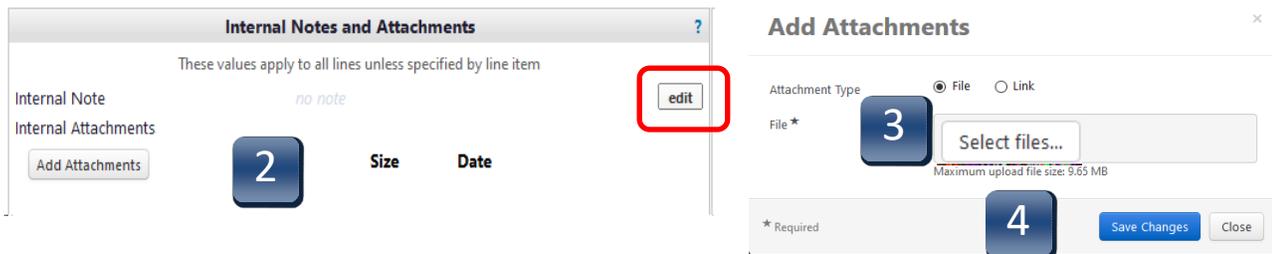
STEP 2: Click on **add attachments** .

STEP 3: Click on **Select Files...** Choose file from saved location.

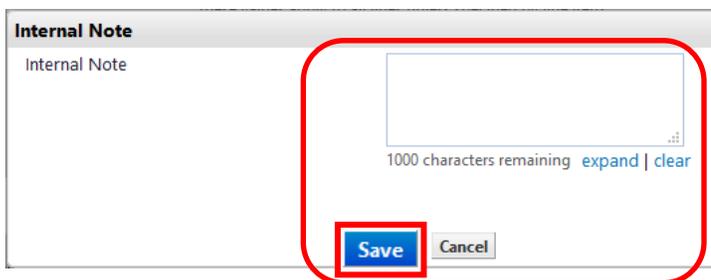
STEP 4: Click **Save Changes**.



Internal Notes and Attachments



To add an internal note, click on edit, add your note and click **Save**.



Completing the Checkout Process – External Notes and Attachments

STEP 1: Click on **External Notes and Attachments** tab. This is optional.

****External attachments are seen by the vendor. Use Internal for attachments for Purchasing or Accounts Payable offices, e.g. Sole Source/Proprietary form, Bids, Quotes, Proposals, etc.**

STEP 2: Click on **add attachments**.

STEP 3: Click on **Select Files...** Choose file from saved location.

STEP 4: Click **Save Changes**.

The screenshot shows the 'External Notes and Attachments' section of a software interface. At the top, a navigation bar includes tabs for General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments (highlighted), Purchasing Use Only, and Final Review. A blue box with the number '1' points to the 'External Notes and Attachments' tab. Below the navigation bar, the 'External Notes and Attachments' section is visible. It contains a table with columns for 'Size' and 'Date'. A blue box with the number '2' points to the 'Add Attachments' button. An 'edit' button is circled in red, with a blue box containing the number '1' pointing to it. To the right, an 'Add Attachments' dialog box is open. It has radio buttons for 'File' (selected) and 'Link'. A blue box with the number '3' points to the 'Select files...' button. At the bottom of the dialog, a blue box with the number '4' points to the 'Save Changes' button.

To add an external note, click on edit, add your note and click **Save**.

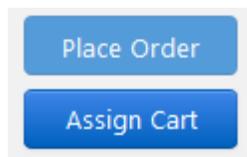
The screenshot shows the 'External Info' dialog box. It has a title bar 'External Info' and a subtitle 'Note to all Suppliers'. Below the subtitle is a large text input area. A red box highlights the text input area and the 'Save' button at the bottom. The text input area contains the text '1000 characters remaining expand | clear'. The 'Save' button is highlighted with a red box.

Completing the Checkout Process – Final Review

When all checkout process tabs have green checks indicating their completion, click Final Review to make ready for submission.

Based on your role, you may Place Order or Assign Cart.

Once you have corrected any missing information, your bar should have all green checks. If you do not have any Internal/External Notes or Attachments, click on **Final Review**. This will bring up the requisition. Review all information before you either **Place Order** or **Assign Cart**.



Completing the Checkout Process – Multiple Funding

A cart can have multiple funding splits in two ways:

1. Split of entire cart by percentage
2. Split of individual line items by percentage or designated amount.

Entire Cart by Percentage

STEP 1: While the requisition is in the Final Review workflow, click on the **Accounting Codes** tab.

STEP 2: In the header area at the top of the Accounting Codes tab, click the third **edit** button. **Accounting Codes pop-up menu** appears.

STEP 3: Click **add split**. Second row of code fields appears.

The screenshot shows the 'Accounting Codes' tab in a requisition system. The interface includes a header with tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below the header, there are several rows of data fields. A blue box with the number '1' highlights the 'Accounting Codes' tab. A second blue box with the number '2' highlights an 'Edit' button in the header area. A third blue box with the number '3' highlights an 'add split' button. The 'add split' button is located in a pop-up menu that appears when the 'Edit' button is clicked. The pop-up menu contains fields for 'Fund', 'Cost Center', 'Internal Order', 'WBS Element', 'G/L Account', 'Asset', and 'Asset Sub-Number'. The 'Fund' field is populated with '2000011020' and has a dropdown arrow. The 'Cost Center' field is populated with '1410140000' and has a dropdown arrow. The 'G/L Account' field is populated with '730000' and has a dropdown arrow. The 'add split' button is highlighted with a red border. At the bottom of the pop-up menu, there are 'Save' and 'Cancel' buttons.

Account Assignment Category	Storage Location
K Cost Center	JCKP Purchasing

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BC Bobcatalog Local	no value	no value	no value	no value	no value

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number
2000011020 Des Method	1410140000 Procurement	no value	no value	730000 Consumable Supplies	no value	no value

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number
<input type="text" value="2000011020"/> Select from all values...	<input type="text" value="1410140000"/> Select from profile values... Select from all values...	<input type="text"/> Select from all values...	<input type="text"/>	<input type="text" value="730000"/> Select from all values...	<input type="text"/>	<input type="text"/>

Completing the Checkout Process – Multiple Funding

- STEP 4:** Selection can only be split by percentage. If you need to split by a certain amount, you must do this by line item.
- STEP 5:** Over write the funding on the line(s) that you want to use for the split. You can also change the original funding.
- STEP 6:** Enter the percentage the cart will be split by. Once you have added the percentages, click on **recalculate / validate**. This will show the total percentage. The total percentage must be 100%.
- STEP 7:** If you will be splitting by 3 or more funds, click on **add split** and another line will be added.
- STEP 8:** Click **Save** when all splits have been added.

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-N	% of Price	
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>		730000 <small>Select from all values...</small>			0	4 <small>add split</small>
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>	5	730000 <small>Select from all values...</small>			0	6 <small>remove</small>
							Split Total 0%	7 add split
							6 recalculate / validate <small>calculations</small>	
							8 Save <small>cancel</small>	

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number	% of Price	
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>		730000 <small>Select from all values...</small>			50	
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values... Select from all values...</small>	<small>Select from all values...</small>		730000 <small>Select from all values...</small>			50	
							Split Total 100%	6 recalculate / validate <small>show monetary calculations</small>

Completing the Checkout Process – Multiple Funding

Split by Line Item

- STEP 1:** While the requisition is in the Final Review workflow, click on the **Accounting Codes** tab.
- STEP 2:** In the line item area at the bottom of the Accounting Codes tab, click the third **edit** button—right above Supplier subtotal. Accounting Codes pop-up menu appears.
****Note: You cannot split an asset that has been assigned an asset number**
- STEP 3:** Click **add split**. Second row of code fields appears.

The screenshot shows the 'Accounting Codes' tab selected in the requisition workflow. A blue box with the number '1' highlights the 'Accounting Codes' tab. Below it, the 'Possible Missions' table is visible, with a blue box with the number '2' highlighting the 'edit' button for the 'Accounting Codes (same as header)' row. Below the table, the 'Accounting Codes' pop-up menu is shown, with a blue box with the number '3' highlighting the 'add split' button. The pop-up menu contains fields for Fund (2000011020), Cost Center (1410140000), Internal Order, WBS Element, G/L Account (730000), and Asset. A 'recalculate / validate' link and 'Save' and 'Cancel' buttons are also present.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 BEAKER GRIFFIN PA 30ML 12/PK more info...	0259110AA	PK	57.91	1 PK	57.91 USD
Other Information (same as header)					edit
Other Information 2 (same as header)					edit
Accounting Codes (same as header)					edit

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Number
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values... Select from all values...</small>	<input type="text"/> <small>Select from all values...</small>	<input type="text"/>	730000 <small>Select from all values...</small>	<input type="text"/>	<input type="text"/>

[recalculate / validate](#)

[Save](#) [Cancel](#)

Completing the Checkout Process – Multiple Funding

- STEP 4:** Choose the method of splitting the funding from the drop-down menu.
- STEP 5:** Enter the information for the second funding information. Once you have added the information, click on **recalculate / validate**. The Split Total must equal either 100%, total amount of line item and/or total quantity.
- STEP 6:** If you will be splitting by 3 or more funds, click on **add split** and another line will be added.
- STEP 7:** Click **Save** when all splits have been added.

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Nu	Amount
2000011020	1410140000			730000			50.00
2000011020	1410140000				734000		7.91

Line subtotal: 57.91 USD Split Total 0

Buttons: Save, Cancel, add split, recalculate / validate

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number	Amount of Price
2000011020	1410140000			730000			50.00
2000011020	1410140000				734000		7.91

Split Total 57.91 USD

Assigning a Cart

- STEP 1:** In the upper right corner, click **Assign Cart**.
- STEP 2:** Click on **Search for an assignee**.
- STEP 3:** Enter the last name of the person you want to assign the cart to then click on **Search**.
- STEP 3:** Click **[select]** to choose desired assignee.
- STEP 4:** Click **Assign**. You should then see the person's name whom you are assigning the cart to in the Assign Cart box.

1

2

3

4

5

Name ^	User Name ^	Email ^	Phone	Action
Shepherd, Melisse F	mfs46	mfs46@txstate.edu	+1 512-245-2521	[select]

Reviewing an Assigned Cart

Once the cart is assigned, you will get a confirmation screen.

Shopping Cart Information ?

 **Congratulations! Your cart was successfully assigned for further review.**

At this point, you can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via requisition history search.

Here is a brief summary of the requisition you have assigned:

Requisition number	36767534
Cart name	2013-02-05 BNB57 01
Requisition total	249.99 USD
Number of line items	1

What would you like to do next? Here are links to some common actions.

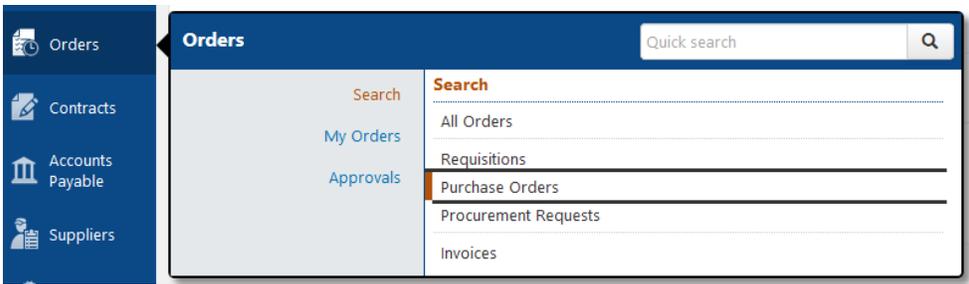
- Search for another item
- Check the status of an order
- Return to your home page
- Create new draft cart

Document Search

Document Search can be used to locate Purchase Orders and Requisitions

STEP 1: Click on **Orders** from the side navigation menu.

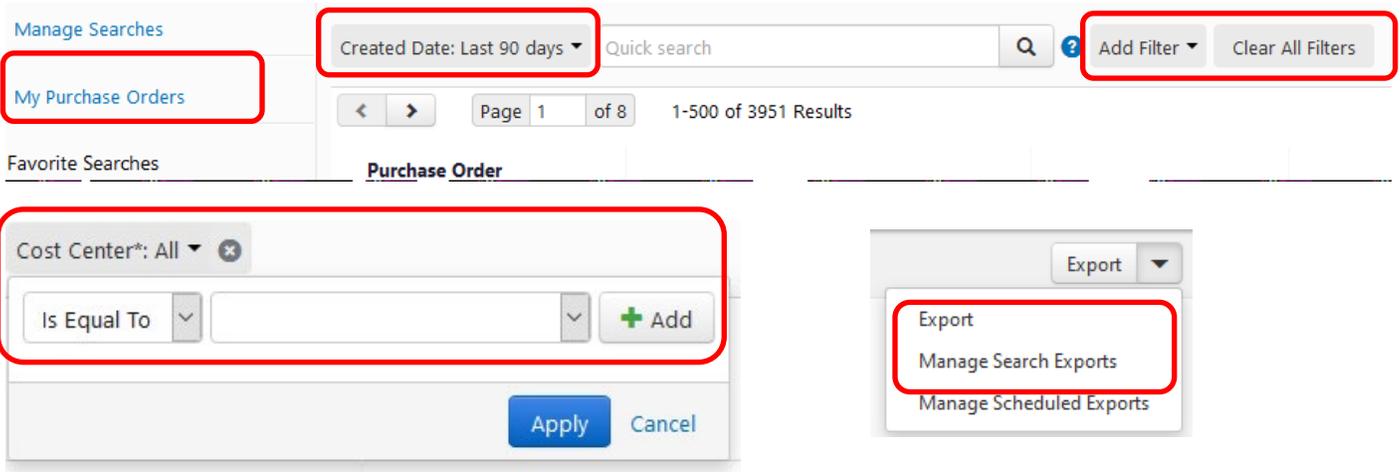
STEP 2: Click on **Search** and choose the type of document you want to search for



All completed purchase orders in the last 90 days will appear. You can change the time-frame to more or less days or just select My Purchase Order to see only the ones you have created.

You can also filter by various options. Click on the down-arrow next to Add Filter. You can choose more than one filter. Some of the filters will ask for additional information such as cost center, fund, etc.

You are also able to export your searches. In order to see the export file, click on Manage Search Exports.



Create a Limit Framework Requisition

Limit Framework requisitions can be created in the TSUS Marketplace **for Non-Catalog SERVICES orders only.**

Step 1: Click on **Non-Catalog item.**

The screenshot displays the TSUS Marketplace interface. On the left is a blue navigation sidebar with links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. The main content area features a search bar at the top with a dropdown menu set to 'Everything' and a 'Go' button. Below the search bar, a breadcrumb trail shows 'Shop > Shopping > Shopping Home > Home/Shop'. A 'Go to:' menu includes options like 'advanced search', 'favorites', 'forms', 'non-catalog item', 'Brands', 'categories', 'contracts', and 'chemicals'. The 'non-catalog item' link is highlighted with a red rectangular box, and a blue callout bubble with the number '1' is positioned over it. The main content area is divided into two sections: 'Science & Research' and 'Technology'. The 'Science & Research' section includes links for Fisher Scientific (Possible Missions-HUB), SIGMA-ALDRICH, ThermoFisher Scientific (formerly Life Science Lab Supplies), and Airgas (Airgas/ Cuevas HUB). The 'Technology' section includes links for DELL (Dell/ Summus HUB), Xerox (Printers-HUB), BH (Photography Equip & Supplies), and DWG (HUB). Below these are links for GrayhaR, ANIXER, Apple, and GT Distributors, INC (GT Distributors, Inc.).

Create a Limit Framework Requisition

A pop-up screen will appear titled **Non-Catalog Item**.

Step 2: Enter Supplier- This is an active search field. Begin typing the name and the vendor will appear below. Select the vendor. If you do not see the vendor, contact purchasing to have the vendor **activated** for shopping. Once it has been activated, start from Step 2 and proceed forward.

Step 2A: Enter a description in **Product Description**.

Step 2B: Leave **Catalog No.** blank.

Step 2C: Enter one (1) in the **Quantity**.

Step 2D: Enter the amount to be paid for the first line in **Price Estimate**.

Step 2E: Select **EA** as an option under **Packaging**.

Step 2F: If you are adding another item select **Save and Add Another**.

Step 2G: If you are only ordering one item, click **Save and Close** when complete.

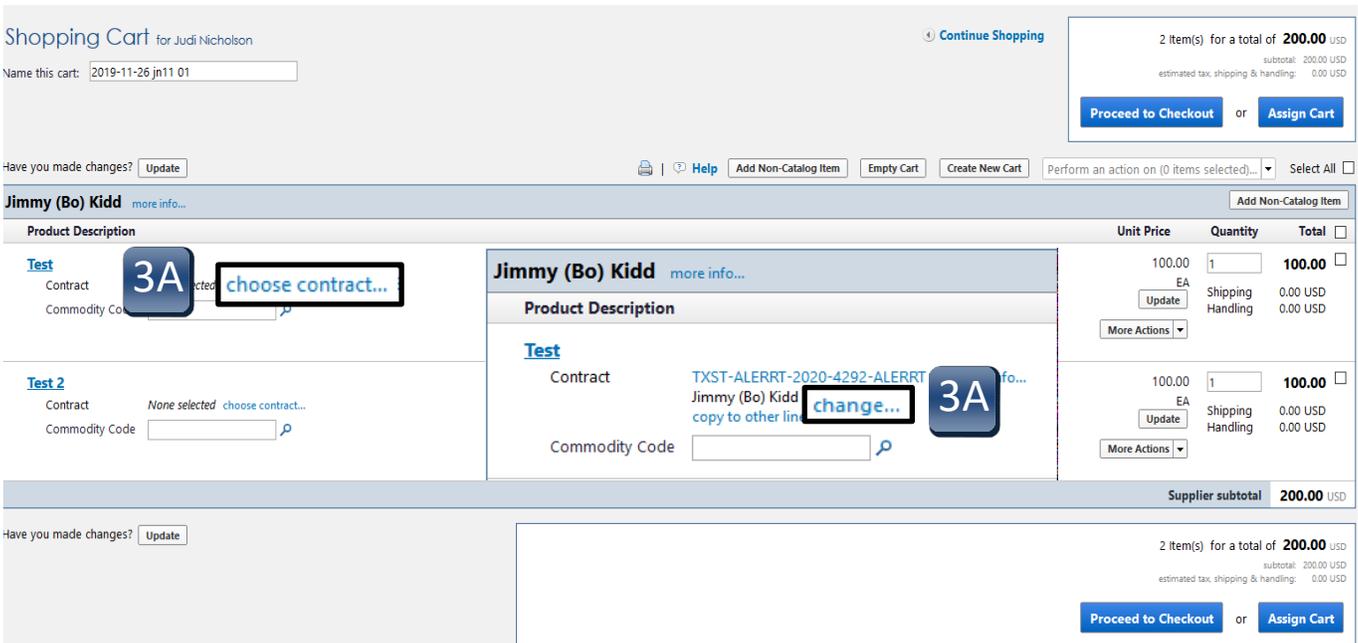
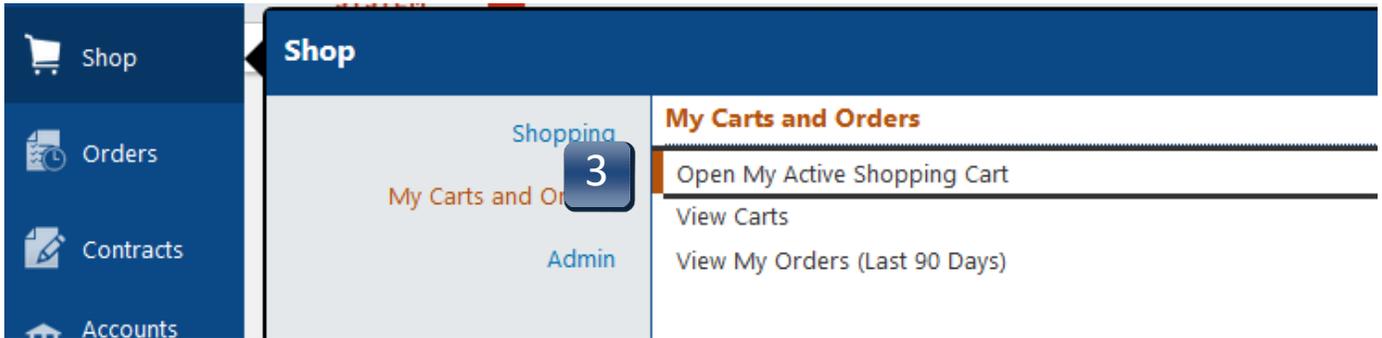
The screenshot shows the 'Non-Catalog Item' form with the following elements and callouts:

- Supplier:** JIMMY (BO) KIDD (Callout 2)
- Address:** 100 Brookhollow Dr, Wimberley, TX 78676-2503 US
- Product Description:** This is a test (Callout 2A)
- Catalog No.:** (Callout 2B)
- Quantity:** 1 (Callout 2C)
- Price Estimate:** 150.00 (Callout 2D)
- Packaging:** EA (Callout 2E)
- Product Details:** A list of checkboxes for various product attributes: Controlled substance, Recycled, Hazardous material, Radioactive, Rad Minor, Select Agent, Toxin, Energy Star, and Green.
- Buttons:** Save and Close (Callout 2F), Save and Add Another (Callout 2G), and Close.

Create a Limit Framework Requisition

Step 3: On the left-hand menu ribbon, click on the **Shop** icon, then choose the **My Carts and Orders** option and choose the **Open My Active Shopping Cart** option. This will list all your active shopping carts. Choose the one from which you want to create a limit framework requisition.

Step 3A: Before clicking **Proceed to Checkout**, check to see if there is a contract associated with the entity. Click on **Choose Contract**. A screen will pop-up with possible matches. Make sure you select the correct contract if there is one and click on **OK**. If there is not a contract, select **No Contract** and click on **OK**. If you have selected an incorrect contract, you can click on **Change Contract** to make changes. Do this for each line.



Create a Limit Framework Requisition

Step 3B: At the next screen click on **Proceed to Checkout**.

Step 4: The **Header Accounting Code** section, as shown below, applies to every line. If you need different accounting codes on different lines, then you must change each line's accounting codes on the requisition. Only lines that **differ** from the Header Accounting Code section will need to be changed. Enter in the information in all the **Required Field** areas making sure that the correct account combination is entered; and then click **Save**. Click on the **Edit** button to the right of each accounting code lines.

Shopping Cart for Judi Nicholson

Name this cart: 2019-11-26 jn11 01

Continue Shopping

2 Item(s) for a total of **200.00** USD
 subtotal: 200.00 USD
 estimated tax, shipping & handling: 0.00 USD

3B Proceed to Checkout or Assign Cart

Have you made changes?

Help Add Non-Catalog Item Empty Cart Create New Cart Perform an action on (0 items selected)... Select All

Jimmy (Bo) Kidd more info... Add Non-Catalog Item

Product Description	Unit Price	Quantity	Total
Test Contract TXST-ALERRT-2020-4292-ALERRT more info... Jimmy (Bo) Kidd change... copy to other lines... Commodity Code <input type="text"/>	100.00 EA Update	1 Shipping Handling	100.00 0.00 USD 0.00 USD
Test 2 Contract None selected choose contract... Commodity Code <input type="text"/>	100.00 EA Update	1 Shipping Handling	100.00 0.00 USD 0.00 USD

Supplier subtotal **200.00** USD

Have you made changes?

3B Proceed to Checkout or Assign Cart

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Final Review

Place Order Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account Assignment Category
- Required field: Fund
- Required field: G/L Account
- Required field: Storage Location

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide value description

Accounting Codes
 These values apply to all lines unless specified by line item

Account Assignment Category		Storage Location	
<input type="text"/>	Required field	<input type="text"/>	Required field
Purchasing Group	PO Type	Limit	Expected Value
CPO	BC	no value	no value
Central Purchasing Office	Bobcatalog Local		
Fund	Cost Center	Internal Order	WBS Element
<input type="text"/>	no value	no value	no value
			G/L Account
			Required field
			Asset
			no value
			Asset Sub-Number
			no value

4 Edit Edit Edit

Create a Limit Framework Requisition

Step 5: To setup the Limit Framework, select **edit** on the second line in the **Header Accounting Codes** section and enter the following:

1. Select the correct **Purchasing Group**; CPO for most of the campus.
2. Change the **PO Type** to **BCF**;
3. Under **Limit** Select **B**.
4. Leave **Expected Value** and **Overall Limit** blank.
5. Enter a valid start date and end date for the Framework.
6. Click **Save** after all data in the **Header Accounting Codes** is entered correctly.

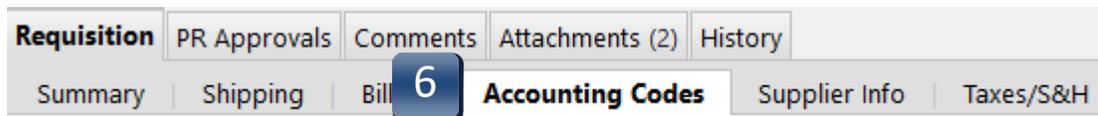
*****It is critical that the dates are entered as shown in the example MMDDYYYY. The framework order will fail and not post into SAP if entered incorrectly.*****

The screenshots illustrate the data entry process for a Limit Framework Requisition in SAP:

- Information 1:** Shows the 'Account Assignment Category' field set to 'K' and 'Storage Location' set to 'JCKP'. Both fields are marked as required.
- Information 2:** Shows the 'Purchasing Group' set to 'CPO', 'PO Type' set to 'BCF', and 'Limit' set to 'B'. The 'Valid Start Date' is '05102018' and the 'Valid End Date' is '06012018'. The 'Save' button is highlighted.
- Codes:** Shows the 'Fund' set to '2000011019' and 'G/L Account' set to '726600'. Both are marked as required. The 'Save' button is highlighted.
- Other Information 2:** Shows a summary of the entered data: 'Purchasing Group' (CPO), 'PO Type' (BCF), 'Limit' (B), 'Valid Start Date' (12312019), and 'Valid End Date' (12312019). Numbered callouts 1 through 5 point to these fields. The 'Save' button is highlighted.

Create a Limit Framework Requisition

- Step 6:** To set the **Expected Value** and **Overall Limit** for each line, make sure the **Accounting Codes** tab is selected; scroll down to the **Product Description** section.
- Step 6A:** For line 1, click on the **edit** button to the right of **Other Information 2 (same as header)** line. A pop-up screen will appear that will allow you to enter the **Expected Value** and the **Overall Value**. When you have finished, click on the **Save** button. Make sure that for each line, you click **edit** and enter the **Expected Value** and the **Overall Value**, clicking on the **Save** button after each entry.
- Step 7:** If you need to attach any internal or external notes and or attachment, proceed to those tabs. Once the notes and attachments sections are complete or you do not have any, proceed to the **Final Review** tab. (See Completing the Checkout Process – Internal and External Notes and Attachments)



Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Test more info...		EA	100.00	1 EA	100.00 USD
Other Information (same as header) edit					
Other Information 2 (same as header) 6A Edit					

Other Information 2 ? X

Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)
CPO Central Purchasing Office	BCF Bobcatalog Framework Order	<input type="text" value="100"/>	<input type="text" value="100"/>	<input type="text" value="100"/>	05182018	06012018

6A Save Cancel



Create a Limit Framework Requisition

Step 8: On the **Final Review** it will be noted if you have completed all the required fields. If you have not, you will need to complete them before you can place the order or assign the cart. There may be a note stating that there is an error, but it will not prevent you from placing the order or assigning the cart. Review the **Accounting Code** section to ensure the correct values are entered for the framework values and the account assignment values. Click on **Place Order** or **Assign Cart** as applicable. If not a requisitioner, only the **Assign Cart** option will be available. Once the cart is placed into order, the requisition will go through the standard workflow for approvals. After approvals, the order is sent to the vendor and imported into SAP. Login into SAP and view the framework order.

The screenshot shows the 'Final Review' step of a requisition process. At the top, a progress bar includes tabs for 'General', 'Shipping', 'Billing', 'Accounting Codes', 'Internal Notes and Attachments', 'External Notes and Attachments', 'Purchasing Use Only', and 'Final Review'. The 'Final Review' tab is active and highlighted in orange. To the right of the progress bar is a blue button with the number '8' and a 'Return to start' link. Below the progress bar are two blue buttons: 'Place Order' and 'Assign Cart'. A yellow message box contains the following text:

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.

You need to be aware of the following issue(s), but it will not prevent you from submitting your request.

- Empty field: Description