

How-To Guide for CSUBUY

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. This guide provides instructions on key features and functionality performed by Shopper and Requester roles in the **CSUBUY Marketplace**.

Requester: Authorized to purchase directly in the CSUBUY Marketplace. A Requester is a **ProCard holder**.

Shopper: Authorized to shop and create a **cart**. Assigns order(s) to a Requester to complete the purchase.

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Quick Start and Logging In

Log into the My Cal Poly Portal.

Under My Apps, click on the CSUBUY for Cal Poly app.



Note

If you do not see the CSUBUY for Cal Poly app quick link, click on "Edit Favorites."

From there, select the CSUBUY for Cal Poly app and click save. If you do not see it there, please clear your cache and try again.

If you still do not see it there, please go to <https://afd.calpoly.edu/cprm/procurement/csubuy> to access the marketplace.

- PolyCard Services
- CSYOU Portal
- ESM Campus Marketplace
- LinkedIn Learning
- Cal Poly Learning Hub
- Edit Favorites**
- CSYOU Portal
- ESM Campus Marketplace
- CSUBUY for Cal Poly**
- LinkedIn Learning
- Cal Poly Learning Hub
- Space & Event Scheduling (25Live)
- DocuSign
- Student Accommodations
- Save**

The app opens with a view of your dashboard. This is where you find all your activities including catalogs, carts, and items waiting to be approved.

Welcome Cal Poly, San Luis Obispo to CSUBUY Marketplace!

GENERAL

- amazon
- ...

INFORMATION TECHNOLOGY

- BH
- ...

FACILITIES MANAGEMENT

- ...

LABORATORY & SCIENTIFIC, MEDICAL & ATHLETIC

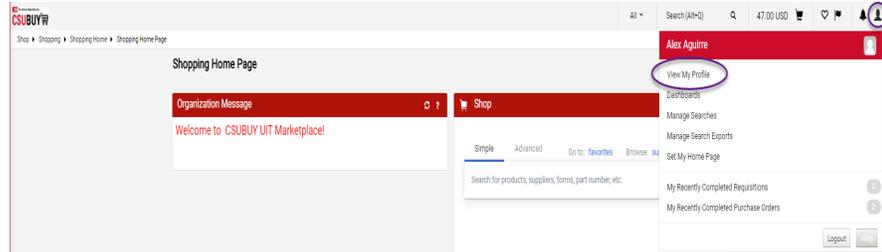
Updating your User Profile

Several key fields need to be completed on your profile before you can begin shopping. The remaining fields in your profile are not required at this time. Please use this section to update these fields before your first purchase or to make any future changes to your profile:

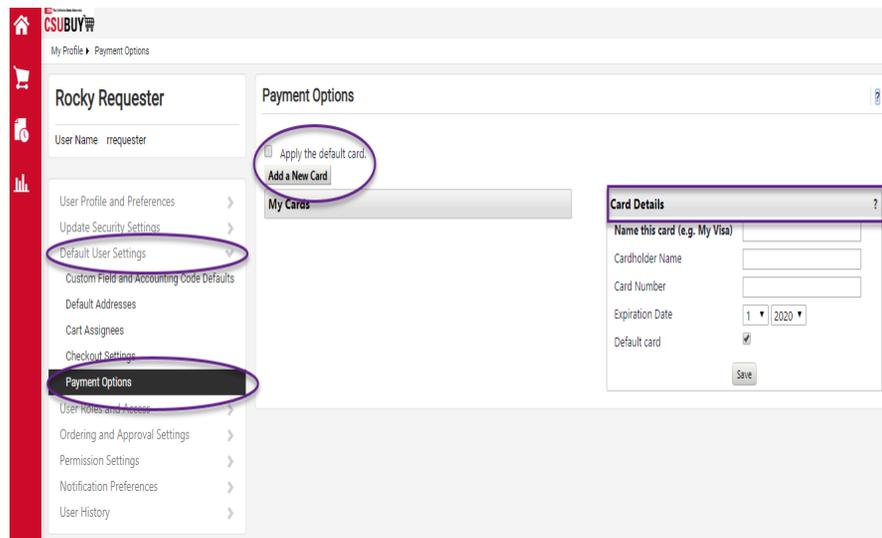
- Entering your ProCard details (Requester Role only)
- Add a cart assignee for transfer cart buyers (Shopper Role only)
- Contact Phone Number (required for some suppliers)
- Default Addresses (Bill to and Ship to)
- Notification Preferences

Add a ProCard to your profile (Requesters only)

Click on icon  and View My Profile



Navigate to Default User Settings → Payment Options

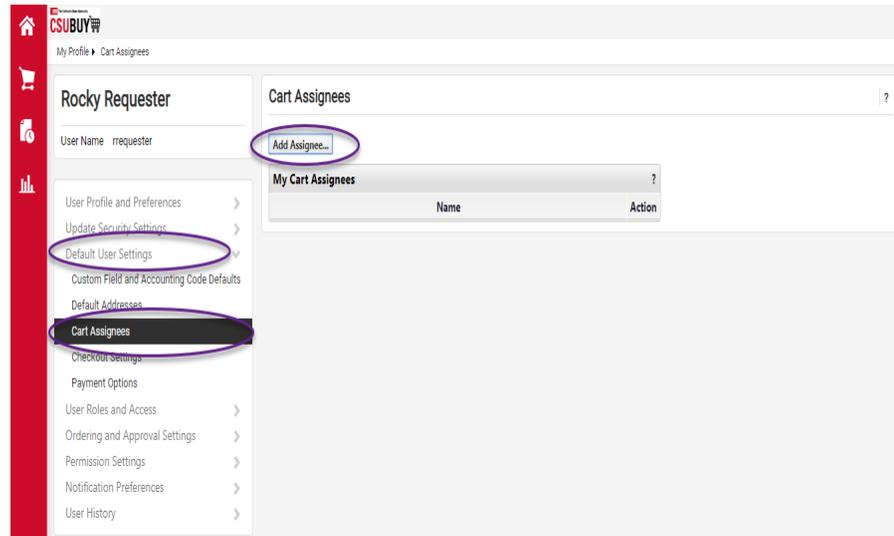


1. Click Add a New Card
2. Enter Cardholder Name, Card Number, Card Security Code and Expiration Date
3. Give it a nickname
4. Save Changes

Tip: Have this ProCard default in your shopping by selecting “Default card” then “Apply the default card” then Save

Add a transfer cart assignee (Shoppers only)

1. Navigate to Default User Settings → Cart Assignees



2. Click Add Assignee and search for the appropriate Requester(s)
3. Multiple Requesters can be added, and you can select one as preferred (default)

Add Contact Information: Phone Number

Tip: Some suppliers require a number to contact you in case an issue arises during your order. If this is not there, it could cause an order to be rejected.

Lori Serna

User Name 15000001919

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Language, Time Zone and Display Settings

Early Access Participation

Guided Tour Instructions

Default User Settings

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

User's Name, Phone Number, Email, etc.

First Name Lori

Last Name Serna

Phone Number ext.

International phone numbers must begin with +

Mobile Phone Number

International phone numbers must begin with +

E-mail Address * lserna@calpoly.edu

Campus Cal Poly San Luis Obispo (calpoly)

Authentication Method SAML

User Name * 15000001919

★ Required

Open your profile by clicking on the person icon in upper right.

1. From the side panel, in your User's Name, Phone Number, Email, etc. section, add at least one phone number.

Assign your default addresses

Click on Default User Settings – Default Addresses

User Profile and Preferences

Default User Settings

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

Payment Options

User Roles and Access

Ordering and Approval Settings

Permission Settings

Notification Preferences

User History

1. Select Ship To tab: press the “Select Addresses for Profile” button

2. Select your delivery address.

Tip: Cal Poly has two available at this time: Cal Poly SLO is for central receiving warehouse and should be selected. Cal Poly University Development is only for those in downtown SLO

3. “Attn: “ field will default to the person signed in and placing the order.
4. Add “Deliver To” – this is the location on campus to receive the delivery. You can change it from one to the other while in your order if necessary, what you see here is a list and a way to select a default ship to.

Format is important for “Deliver To”!

Add Building #-Room # Department Name in this order, try not to abbreviate department names

-Example: 01-128 Payment Services

-Example: 162-233e Mechanical Engineering

Tip: This will ensure your package gets to you as quickly as possible after it arrives at the warehouse. This can also be modified at the line level while in your order. This is just the default.

Ship To **Bill To** ?
 Select an address to edit Select Addresses for Profile Delete Address
 No addresses defined in profile.

Shipping Addresses	Edit Selected Address ?
	Nickname <input type="text" value="Cal Poly SLO"/> Default <input checked="" type="checkbox"/> Current Default --- Address
	ADDRESS Attn: * <input type="text" value="Stephanie Albright"/> Deliver To: * <input type="text" value="01-128 Payment Svcs"/> Address Line 1 <input type="text" value="1 Grand Ave"/> City <input type="text" value="San Luis Obispo"/> State <input type="text" value="CA"/> Zip Code <input type="text" value="93407-9000"/> Country <input type="text" value="United States"/>
	Save

1. Next complete the Bill To tab: press the Select Addresses for Profile button

Default Addresses

No addresses defined in profile.

Ship To **Bill To** ?
 Select an address to edit Select Addresses for Profile
 No addresses defined in profile.

Billing Addresses

2. There is only one Bill To address. Select from the drop down and then save:

Default Addresses

No addresses defined in profile.

Ship To **Bill To** ?
 Select an address to edit Select Addresses for Profile
 No addresses defined in profile.

Billing Addresses

Select Address Template
 Select Address Template

How to update your system notifications

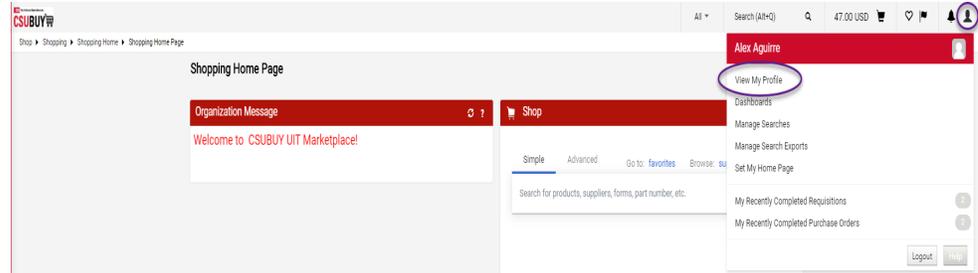
This section allows you to manage the types of communications that can remind you to take action or when a cart has had action taken.

Notification – appears in your dashboard within CSUBUY

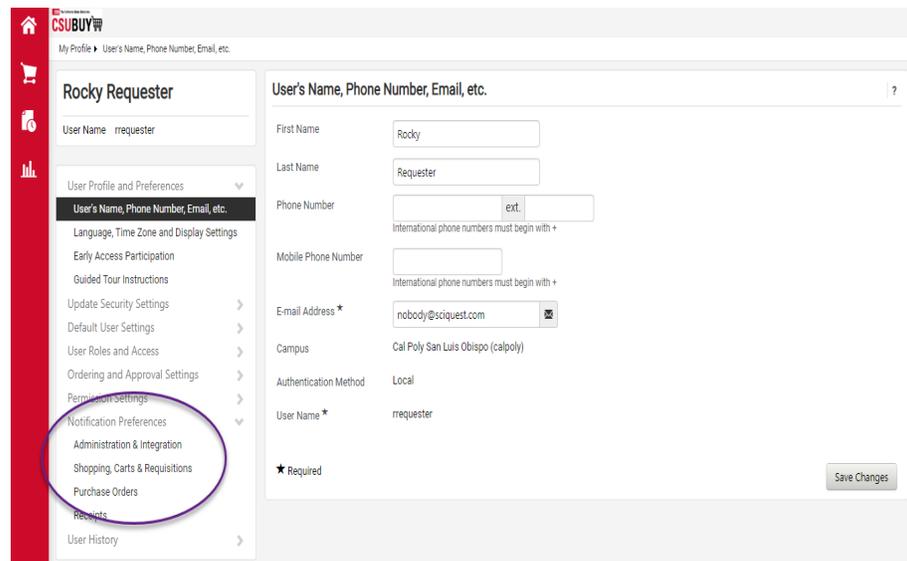
Email – an email from CSUBUY with a link to the system

None – no notification will be sent, you will need to log in and navigate to the appropriate section to take actions

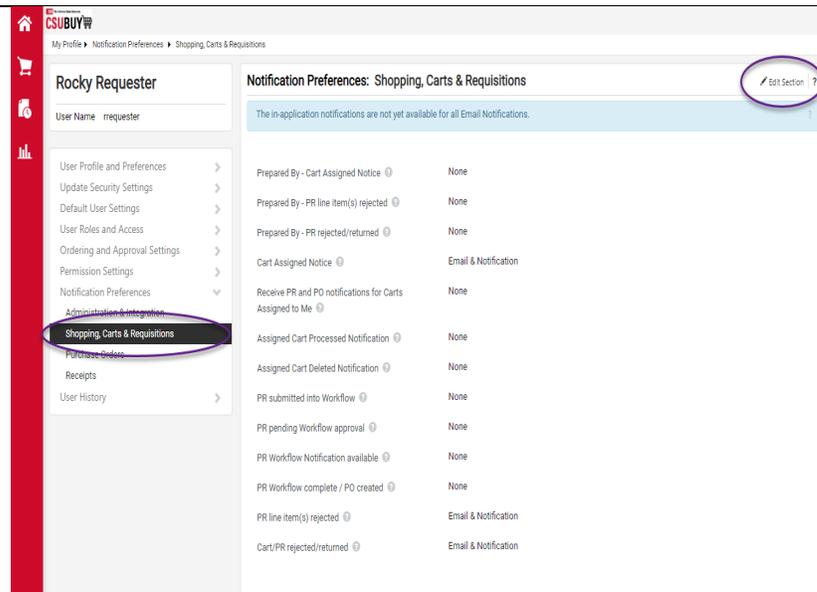
1. Click on View My Profile



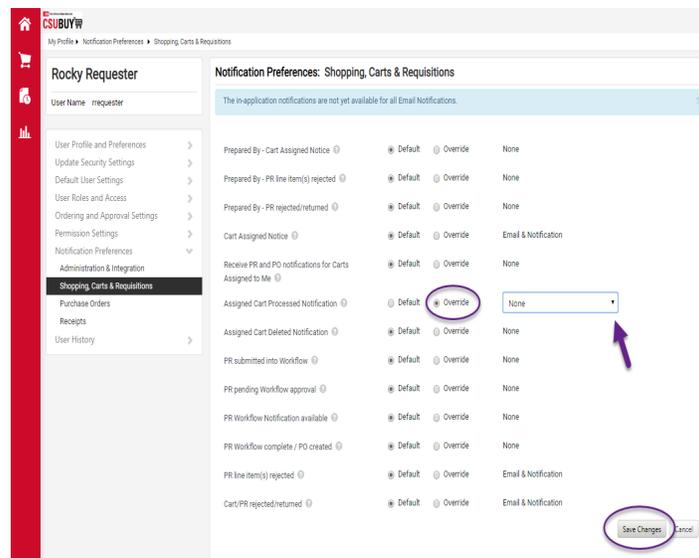
2. Navigate to Notification Preferences



3. Select Shopping Carts & Requisitions/ Purchase Orders or Purchase Orders



4. Click on Edit Section
5. Click Override on the field you want to update



6. Select appropriate option from the dropdown
7. Click Save Changes

Tip: If you click on the little ? bubble you can read more about what that notification does:

Notification Preferences: Shopping, Carts & Requisitions

Assigned Cart Processed Notification	None
PR submitted into workflow	None
PR pending Workflow approval	None

An email is sent to the specified user when the assigned cart has been successfully approved and processed.

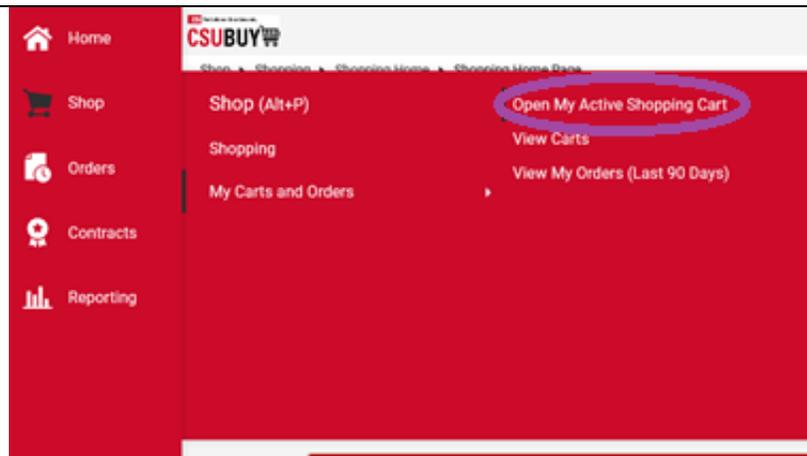
Start Shopping

You can begin shopping from several locations:

Using the sidebar, click on Shop and then Go To Shopping Home

From your dashboard, simply click on the catalog where you would like to shop. You can use multiple supplier catalogs per cart/order.

See the next section for details on ordering.



This is the basic shopping process:

1. Click on a catalog
2. Search for your items or from a favorite list with the supplier
3. Once complete in the supplier's punch out catalog, checkout back to your CSUBUY cart
4. All items across one or more catalogs will show in one cart. Complete by checking out in CSUBUY.

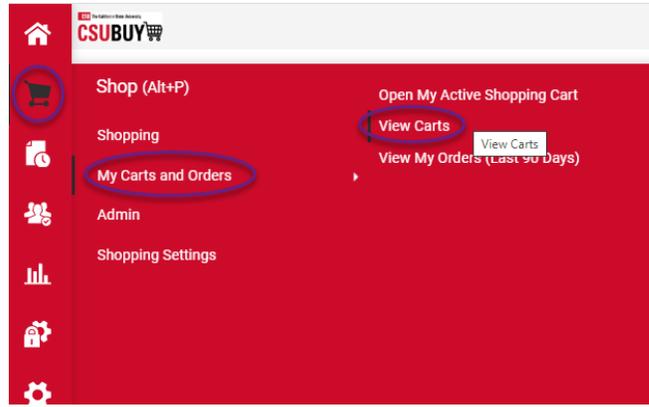
Tip: You can exit CSUBUY and go back to an open cart without checking out. Next time you log back into CSUBUY navigate from the side panel to "Open My Active Shopping Cart"

Example: Start shopping on Monday, and add items throughout the week as they come up, checkout Friday.

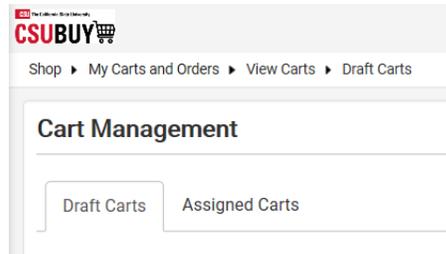
How to see your draft carts

You can have multiple carts started at once, if you need to manage orders separately. Only one cart can be “active” at a time.

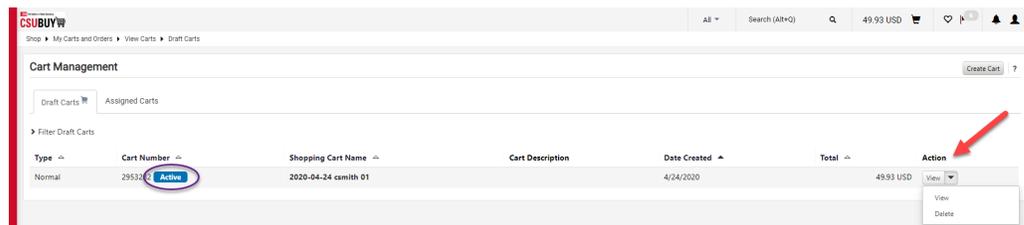
1. Navigate to Shop → My Carts and Orders → View Carts



2. Click Draft Carts



3. Select appropriate Shopping Cart Name to make that the active cart
4. Select the Action Dropdown to View, Activate or Delete the cart



Ordering

This section provides more details on the checkout process and assumes your cart is ready to checkout.

How to assign your cart to a Requester

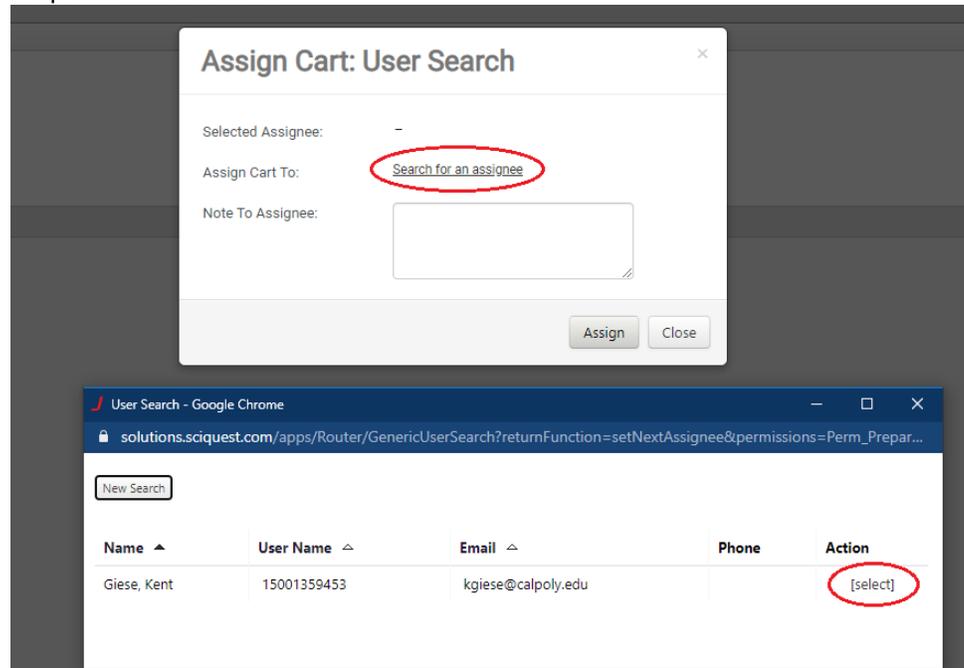
This is usually someone within your own department with a ProCard who is authorized to make a purchase on your behalf.

1. Click "Assign Cart"

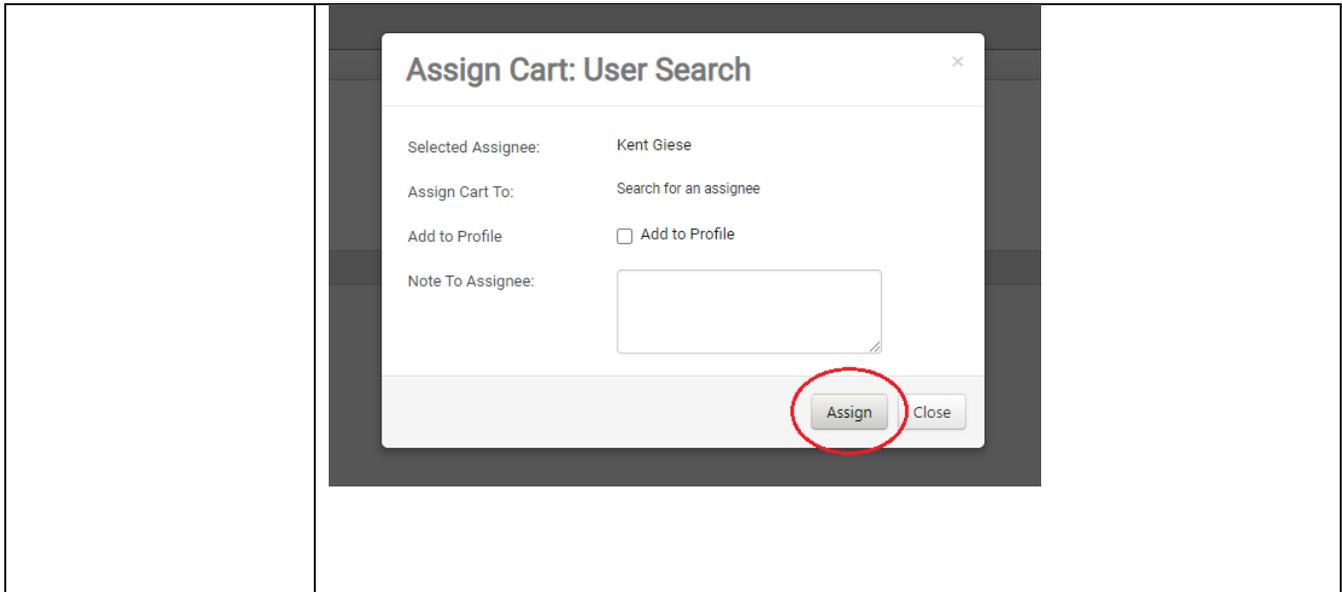


2. Click "Search for an assignee" to search for desired Requester

3. Select the appropriate Requester by clicking "select" upon finding the Requester in the search



4. Click "Assign"

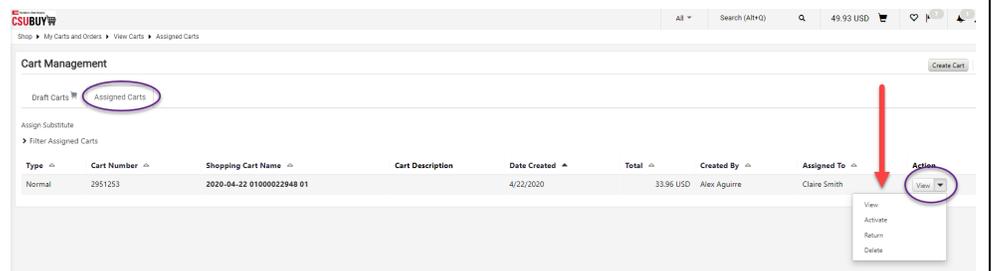


How to accept a cart from a Shopper (Requesters only)

Navigate to Shop → My Carts and Orders → View Carts → Assigned Carts or click on your actions items icon and choose Carts assigned to Me.

Click Shopping Cart Name to activate the cart or use the Action dropdown to view, return or delete.

TIP: You can also return a cart to a Shopper (i.e not complete the transaction) and send them a note with the return, providing reason for return. To do this Navigate to Shop → My Carts and Orders → Open My Active Shopping Cart and use the “Return Cart” button at the top left. A pop-up screen will appear with a note field to complete before returning cart.



How to submit your order

Once your cart is final, click "Proceed to Checkout":

The screenshot shows the CSUBUY shopping cart interface. At the top, there is a navigation bar with 'All', 'Search (Alt+Q)', and a cart icon showing '56.98 USD'. Below this, a 'Continue Shopping' section displays '1 Item(s) for a total of 56.98 USD', with a subtotal of 53.13 USD and estimated tax, shipping & handling of 3.85 USD. A red circle highlights the 'Proceed to Checkout' button, with an 'or' separator and an 'Assign Cart' button to its right. Below the cart items, there is a table with columns for 'Unit Price', 'Quantity', and 'Total'. The table lists one item with a unit price of 53.13 and a quantity of 1, totaling 53.13. It also lists 'Tax' (3.85 USD), 'Shipping' (0.00 USD), and 'Handling' (0.00 USD). At the bottom, the 'Supplier subtotal' is 56.98 USD.

When all required data is complete click "Place order." (CSUBUY will display if any fields still need to be completed in order to place the order. Example: ProCard 3-digit CVV security code must be entered before each order).

The screenshot shows the CSUBUY requisition draft page. At the top, there is a navigation bar with 'All', 'Search (Alt+Q)', and a cart icon showing '56.98 USD'. Below this, a yellow banner with a red 'X' icon and the text 'Almost ready to go! The list below needs to be addressed before the request can be submitted.' is displayed. A red circle highlights the 'Place Order' button, with an 'Assign Cart' button to its right. Below the banner, the requisition details are shown: 'Requisitions: 132331399', '2020-05-27 15001359453 01', 'Status: Draft', and 'Document Total: 56.98 USD'. A sidebar on the left lists various requisition sections with checkmarks: 'General', 'Shipping', 'Billing', 'Accounting Codes', 'Internal Notes and Attachm...', 'Taxes, Shipping & Handling', and 'Final Review'. The main content area is titled 'Billing' and includes a 'Bill To' section with the address: 'Accounts Payable, 1 Grand Ave, San Luis Obispo, CA 93407-9000, United States'. Below this is a 'Credit Card Info' section with the message 'No credit card has been assigned.' and a red 'X' icon with the text 'Required field'. At the bottom, there is a 'Lines' section with a 'Selected Line Item Actions' dropdown menu.

How to add an internal note and/or attachment to your order or line items

After you have proceeded to checkout, a final confirmation window will display:

-Click the "Internal Notes and Attachments" tab on the left side

-Click "edit" and input your note

What to expect after ordering

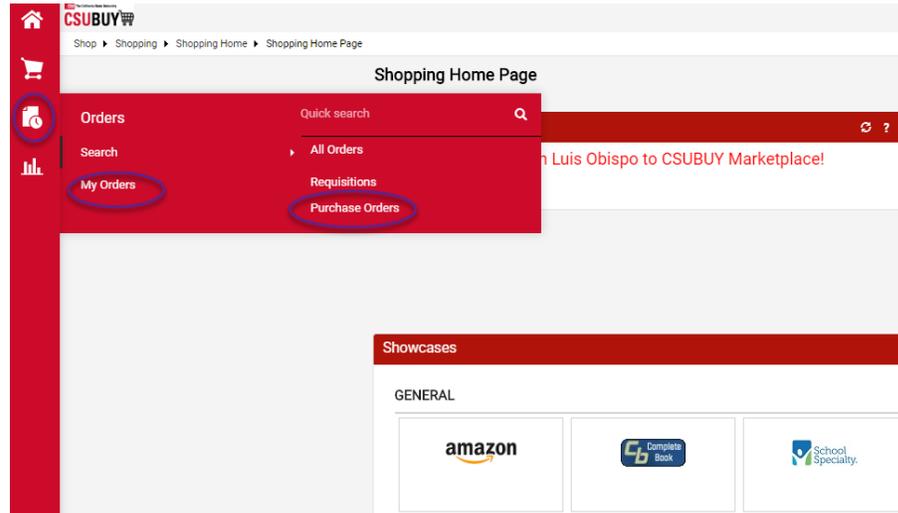
After you have successfully placed your order, the supplier will send you a confirmation email:

- If you are satisfied with your order, monitor the receipt of the shipment
- The supplier may send an advanced copy of the actual invoice that you will need for your ProCard reconciliation, or they may include it in the package with the products you ordered. Either way, save your receipt/invoice to use during ProCard reconciliation. You can always export a copy of your order using CSUBUY reports section instructions in this guide (*see Reporting section*).
- If you need to cancel your order, contact your campus CSUBUY system administrator. For Cal Poly, this is in Strategic Business Services at 805-756-2232.
- If you can verify through tracking that your item has arrived on campus but are unable to locate it, please contact Distribution Services at warehouse@calpoly.edu and provide your tracking number for tracking services.
- Follow the normal process for the ProCard reconciliation period. See our website with questions.

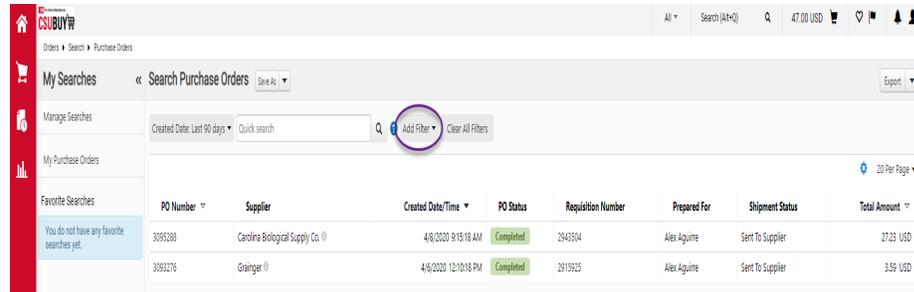
Reporting

How to access your past order details

Navigate to Orders → My Orders → My Purchase Orders



Click Add Filter to narrow your results



Select the order you wish to review details and save any copies you need.