

CSUBUY End User Training Guide

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

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

Roles

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

Shopper

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

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

Requester

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

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

Resource Definitions

Procard: A University issued Procurement Card.

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

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





Updating Your User Profile

How to Add/Update Your User Preferences

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

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	Shop ▶ Shopping ▶ Shopping Home ▶ Shopping Home Page			Michael Phillips						1
7		Shopping Home Page Dashboard Actions -		View My Profile	2					1
i.		Organization Message		Dashboards Manage Searches						
Q		Welcome to Production CSUBUY Marketplace!		Manage Search Exp	orts					
-11 ,					You do no	t have any recent	orders			
%								Logout	Help	

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

Michael Phillips		User's Name, Phone	e Number, Email, etc. ?
User Name 06000019769		First Name	Michael
		Last Name	Phillips
User Profile and Preferences 3	<	Phone Number	+1 831-582-4252 ext.
User's Name, Phone Number, Email, e	etc.	4	5 +1 831-582-4252 ext. International phone numbers must begin with +
Language, Time Zone and Display Se	ttings	Mobile Phone Number	
App Activation Codes		Mobile Phone Number	
Early Access Participation			International phone numbers must begin with +
Guided Tour Instructions		E-mail Address *	miphillips@csumb.edu
Default User Settings	>	Campus	
User Roles and Access	>	Campus	CSU Monterey Bay (csumb)
Ordering and Approval Settings	>	Department	✓
Permission Settings	>		
Notification Preferences	>	Position	~
User History	>	Authentication Method	SAML
Administrative Tasks	>	User Name *	06000019769
		★ Required	6 Save Changes

How to Add Your Ship to Addresses to Your Profile

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

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	Shop ► Shopping ► Shopping Home ► Shopping Home Page			Michael Phillips				
7				View My Profile	2			
i.		Organization Message		Dashboards Manage Searches				
e		Welcome to Production CSUBUY Marketplace!		Manage Search Exp				
-225				Set My Home Page		t have any recent orde	ers	
%							Logout	Help
							Pag	ge 3 of 14





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

Vichael Phillips		Default Addresses	
Jser Name 06000019769		O No addresses det	ined in profile.
User Profile and Preferences	>	Ship To Bill To	
Default User Settings 3	 		
Custom Field and Accounting Code D	efaults	Select an address to edit	5 Select Addresses for Profile
Default Addresses	4	O No addresses defined in profile.	
Cart Assignees			Select Address Template
Checkout Settings		Shipping Addresses	Select
Payment Options			Address
User Roles and Access	>		Template
Ordering and Approval Settings	>		
Permission Settings	>		
Notification Preferences	>		
User History	5		
Administrative Tasks	-		

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

Vichael Phillips		Default Addresse	es	
lser Name 06000019769		O No ad	ldresses define	ined in profile.
User Profile and Preferences Default User Settings	> <	Ship To Bill To		Select Addresses for Prof
Custom Field and Accounting Code D Default Addresses Cart Assignees	Defaults	O No addresses defi profile.	ined in	
Checkout Settings Payment Options		Shipping Address	es ^	Select Address Template Select
Jser Roles and Access	\$			Address Template California State University, Monterey B
Ordering and Approval Settings	Ś			
Permission Settings	>			6
Notification Preferences	>			
User History	>			
Administrative Tasks	5			



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

Michael Phillips		Default Addresses			
User Name 06000019769		O No addresses o	lefined in profile.		
User Profile and Preferences	>	Ship To Bill To 10			
Default User Settings	<	Select an address to edit	Sel	ect Addresses for Profile	Delete Add
Custom Field and Accounting Code Default Addresses	Defaults	No addresses defined in			
	_	profile.			
Cart Assignees		Shipping Addresses	Edit Selected Ad	dress	
Checkout Settings			 Nickname 	California State Uni	versity. Mor
Payment Options			Default		rgetoyour
User Roles and Access	>		Current Default		ling/room#
Ordering and Approval Settings	>		Address		1
Permission Settings	>		ADDRESS		
Notification Preferences	>		Attn: *	Michael Phillips	
User History	S		Deliver To:	Mountain Hall, Suit	e B (8)
Administrative Tasks	\$		Address Line 1	100 Campus Center	
	<i>•</i>		- City	Seaside	
			State	CA	
			Zip Code	93955-8001	

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

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

^			All 👻	Search (Alt+Q)	٩	0.00 USD	Æ	♡	
	Shop ► Shopping ► Shopping Home ► Shopping Home Page			Michael Phillips					
7		Shopping Home Page Dashboard Actions -		View My Profile	2				
i.		Organization Message		Dashboards Manage Searches					
2		Welcome to Production CSUBUY Marketplace!		Manage Search Exp					
-225				Set My Home Page		ot have any rece	nt order	s	
P								Logout	Help

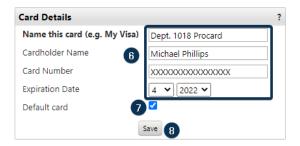
- 3. Navigate to Default User Settings
- 4. Payment Options
- 5. Click Add a New Card and enter in the Procard details





My Profile Payment Options		
Michael Phillips		Payment Options
User Name 06000019769		Apply the default card.
User Profile and Preferences	>	My Cards
Default User Settings 3	<	
Custom Field and Accounting Code D	efaults	
Default Addresses		
Cart Assignees		
Checkout Settings		
Payment Options		
User Roles and Access	>	
Ordering and Approval Settings	>	
Permission Settings	>	
Notification Preferences	>	
User History	>	
Administrative Tasks	>	

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



Ordering

How to Punchout to a Supplier Catalog (Referred to as a "PunchOut")

- 1. Navigate to the Home Page Menu Option
- 2. Look for the PunchOut/Storefront Catalogs Showcase
- 3. Click on the desired Supplier

* Please note that once clicked, some Supplier PunchOuts may appear in the same window, while some may open an additional window.

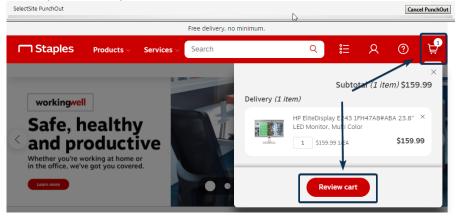


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Shop ▶ Shopping ▶ Shopping Home ▶	Shopping Home Pa	ge				- D Logout
Shopping Home Page Dash	board Actions 🔻					
Organization Message						
Welcome to Production	CSUBUY Ma	rketplace!				
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🎽 Shop				Ø?	Online Sea	rchable Help
Search Everything	✓ Produce	t Keywords, Descripti		۹	Search	Search By Keywo
Shortcuts Favorites Forms Non-Catalog	g Form		Advan	ced Search		
Browse Suppliers Categories Contra	ts					
Showcases 2						
✓ GENERAL					3	¥
amazon	C b ^c	mplete Book	Sch	iool icialty.	STA	PLES
	Shop) Shopping) Shopping Home) Shopping Home Page Dash Organization Message Welcome to Production Shortcuts Favorites Forms Non-Catalog Browse Suppliers Categories Contract Showcases 2 V GENERAL	Shop I Shopping I Shopping Home I Shopping Home Page Dashboard Actions	Shop I Shopping I Shopping Home I Shopping Home Page Shopping Home Page Dashboard Actions Organization Message Welcome to Production CSUBUY Marketplace! Shop Search Everything Product Keywords, Descripting Shortcuts Favorites Forms Non-Catalog Form Browse Suppliers Categories Contracts Showcases 2 General	Shop In Shopping I Shopping Home I Shopping Home Page Shopping Home Page Dashboard Actions Organization Message Welcome to Production CSUBUY Marketplace! Shop Search Everything Product Keywords, Description, Supplier Advan Shortcuts Favorites Forms Non-Catalog Form Browse Suppliers Categories Contracts Showcases 2 Categories Contracts Showcases 2 Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts Categories Contracts	Shop I Shopping I Shopping Home I Shopping Home Page Shopping Home Page Dashboard Actions Organization Message Welcome to Production CSUBUY Marketplace! Shop Shop Shop Product Keywords, Description, Supplier Advanced Search Shortcuts Favorites Forms Non-Catalog Form Browse Suppliers Categories Contracts Showcases 2 General	Shop & Shopping & Shopping Home & Shopping Home Page Shopping Home Page Dashboard Actions Organization Message Welcome to Production CSUBUY Marketplace!

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

SelectSite PunchOut							Cane	el PunchOut
			Free delivery, no minimum.					
🗂 Staples	Products ~	Services ~	Search	Q	:::	R	?	Ë

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







7. Click on Submit Order

SelectSite PunchOut			Cancel Pu
□ Staples	Search	Q	;; ;;
Review & Checko	ut		Print to
	Order Summary Items (1) \$159.99 Total \$159.99 Submit Order		
1 item in cart Delivery			
	HP EliteDisplay E243 1FH47A8#ABA 23.8" LED Monitor, Multi Color Item # 24207721 WFR # 15H47A8#ABA	\$	<u>\$159,99</u> 159,99 159,99 iited Time Offer

8. The Supplier PunchOut/Storefront will close and bring you back to CSUBUY to your CSUBUY shopping cart

(You may repeat the 8 steps multiple times if you are shopping at more than one PunchOut/Storefront, which would create one CSUBUY Shopping cart order containing goods from multiple Suppliers)

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

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

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

CSUBUY Shopping Cart

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

1	CSUBUYE C MARCH	All 👻	Search (Alt+Q)	۹	73.29 USD 📜 ♡	₩ ≜ 1
	Shop 🕨 My Carts and Orders 🕨 Open My Active Shopping Ca 🕨 Cart - 137403949 - Draft Requisition					-D Logout
	Shopping Cart for Michael Phillips Name this cart; Cable Order - 12-1-2020		() Continue Shoppir	ng	4 Item(s) for a to estimated tax, shipping 8	subtotal: 73.29 USD
e					Proceed to Checkout or	Assign Cart
28	Have you made changes? Update	🚔 😳 Help 🛛 Empty Cart	Create New Cart	Perfor	m an action on (0 items selected)	Select All



California State University MONTEREY BAY

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

SUBUY H		All 👻	Search (Alt+Q)	Q	163.51 USD	Ξ.	♡	' 🐥	
Shop My Carts and Orders	Open My Active Shopping Cart 🕨 Cart -	138289768 - Draf	t Requisition					-0	Logout
Shopping Ca	t for Michael Phillips		④ Continue Shopp	oing	2 It	em(s) for	r a total (of 163.5	1 usp
Name this cart: 2020-11-	21 06000019769 01				estimat	ed tax, ship		btotal: 163. odling: 0	51 USD 00 USD
								j	
	G				Proceed to Ch	eckout	or	Assign C	art
			-						
Have you made changes? [Update 🔒 🔅 Help	Empty Cart	Create New Cart	Perform	n an action on (0 it	ems selec	ted)	Select	ali 🗌
STAPLES Staples	more info								
The item(s) in this group w	as retrieved from the supplier's web	site. What doe	s this mean?						
·····					\				
Need to make changes?	MODIFY ITEMS VIEW ITEMS Ite	em(s) was retri	ieved on: 11/21/2020	4:07:15 PM	И., Ц.				
Need to make changes? Line(s): 1	MODIFY ITEMS VIEW ITEMS Ite	em(s) was retri	ieved on: 11/21/2020	4:07:15 PN	1 . \				
Line(s): 1	MODIFY ITEMS VIEW ITEMS Ite MODIFY ITEMS VIEW ITEMS Ite				1.				
Line(s): 1 Need to make changes?					1.	Qua	intity	Tot	al 🗌
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Line(s): 1 Need to make changes? Line(s): 2 Product Description <u>HP EliteDisplay Ei</u> Part Number Manufacturer Info Contract Staples 30% Recy (112350/1542)	MODIFY ITEMS VIEW ITEMS Ite 243 1FH47A8#ABA 23.8" LEE 24207721 1FH47A8#ABA - (INGRAM MICRO StaplesBusinessAdvantage_Eandl StaplesBusinessAdvantage_Eandl char cled 8.5" x 11" Copy Paper, 2	em(s) was retri D Monitor, I P.D,) ▼ more info nge	ieved on: 11/21/2020 Multi Color	4:46:03 PN	A Unit Price 159.99 EA Update More Actions	1 Tax Shipp Hand	bing ling	159.99 0.00 US 0.00 US 0.00 US	
Line(s): 1 Need to make changes? Line(s): 2 Product Description <u>HP EliteDisplay Ei</u> Part Number Manufacturer Info Contract <u>Staples 30% Recy</u> (112350/1542) Part Number	MODIFY ITEMS VIEW ITEMS Ite 243 1FH47A8#ABA 23.8" LEE 24207721 1FH47A8#ABA - (INGRAM MICRO StaplesBusinessAdvantage_Eandl char staplesBusinessAdvantage_Eandl char cled 8.5" x 11" Copy Paper, 3 492071	em(s) was retri D Monitor, I P.D,) ▼ more info nge	ieved on: 11/21/2020 Multi Color	4:46:03 PN	MUnit Price	Tax Shipp Hand	bing ling	159.99 0.00 US 0.00 US 0.00 US 3.52 0.00 US	
Line(s): 1 Need to make changes? Line(s): 2 Product Description <u>HP EliteDisplay Ei</u> Part Number Manufacturer Info Contract <u>Staples 30% Recy</u> (112350/1542) Part Number	MODIFY ITEMS VIEW ITEMS Ite 243 1FH47A8#ABA 23.8" LEE 24207721 1FH47A8#ABA - (INGRAM MICRO StaplesBusinessAdvantage_Eandl StaplesBusinessAdvantage_Eandl char cled 8.5" x 11" Copy Paper, 2	more info more info more info	ieved on: 11/21/2020 Multi Color	4:46:03 PN	More Actions	2 1 Tax Shipp Hand 2 1 Tax Shipp	bing ling	159.99 0.00 US 0.00 US 0.00 US 3.52 0.00 US 0.00 US	

Assigning A Cart

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

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

	r a total of 73.29 USD subtotal: 73.29 USD ping & handling: 0.00 USD or Assign Cart		
3	for an assignee"		
Assign Cart:	User Search		Ĕ
Selected Assignee:	-		
Assign Cart To:	Search for an assignee		
Note To Assignee:		<i>i</i>	
		Assign	Close





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

User Search		
Last Name 😧	Silva	
First Name 😧 🔰	Miguel	
User Nadim 😨		
Email 😨		
Campus 🕄	Campus Name	٩
Department 💿 🖌		~
Position 😨		~
Role 😨		~
Results Per age	10	~
Search		

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

ī

New Search				
Name 🔺	User Name	Email 🗠	Phone	Action
Silva, Miguel	06000025555	msilva@csumb.edu	>	[select]

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

Assign Cart: User Search						
Selected Assignee: Assign Cart To:	Miguel Silva Search for an assignee					
Add to Profile	Add to Profile					
Note To Assignee:						
		Assign Close				

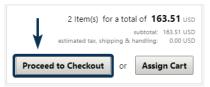
The person assigned the cart will receive an email shortly after to alert them that they have received a shopping cart to process. The normal ProCard guidelines will still apply, meaning that the "Requester" receiving the cart will still need to have approval from their approving official before finalizing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



Checkout Process for "Requesters"

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

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



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

		All 👻	Search (Alt+Q)	۹	163.51 USD 📜	\heartsuit	M 🔺 🕇
Orders + Search 🔓 Requisitions + Billing - 13	38289768 - Draft Req	uisition					- D Logour
< Return to shopping cart							
This order is ready to be placed.							Assign Cart
Requisitions: 138289768 2020-11-21 06000019769 01	Billing			-	Document	Actions 🔻	History 🖨 ?
Status: Draft Document Total: 163.51 USD	Bill To						edit
Requisitions <	Billing addres	5		Suite B 100 Cam	a State University, Mon pus Center CA 93955-8001 tates	terey Bay	Mountain Hall,
Shipping 🗸			_				
FOIIOWI	ng these	e step	s:			_	
Ship To							
Complete the fields below to enter y	our shipping a	ddress for	r this order. If you r	ieed to ma	ake a change, select	а	
Shipping address		0	select from your		~		
To choose a different address, click I	nere		California State	e Universi	ty, Monterey Ba		
Address Details		~	<u> </u>				
Attn: *		2	Michael Phillip	s			
Deliver To:		2 L	Mountain Hall,				
Address Line 1		-	100 Campus Ce	enter			
City State			Seaside CA	Ch	ange to your		
Zip Code			93955-8001	bu	ilding/room#		
Country			United States				
			3	Save	Cancel		

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



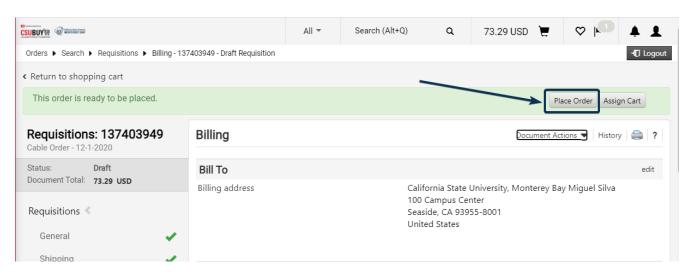


Orders Search Requisitions Billing - 138	3289768 - Draft Requisition	
< Return to shopping cart		
This order is ready to be placed.		Assign Cart
Requisitions: 138289768 2020-11-21 06000019769 01	Billing	Document Actions 👻 History 🚔 ?
Status: Draft Document Total: 163.51 USD	Bill To	edit
Requisitions <	Billing address	California State University, Monterey Bay Mountain Hall, Suite B 100 Campus Center Seaside, CA 93955-8001 United States
General 🖌		
Shipping 🗸	Credit Card Info	edt
Billing 🗸	No credit card has been assigned.	eait
Accounting Codes 🖌		manage your cards 🍃
Internal Notes and Attachm 🖌		

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

Credit Card Info	
Complete the fields below to enter your credit card information for	or this order.
Choose one of your cards:	~
Or to add a new credit card, click here	
Card Details	Dept 1018 Procard
Cardholder Name	
Card Number	
Card Security Code	
Expiration Date	1 2020 -
	Save Cancel Clear

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







Returning or Deleting a Cart

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

â	CSUBUY'R C MARRIER		
20	Shop My Catte and Orders > Open My Activ Shop (Alt+P) Shopping	Open My Active Shopping Cart View Carts 3	eition Im
10		View My Orders (Last 90 Days)	Ě
2	Admin		
<u>-12</u>			
\\$			1?
Î			1/23/2020 9:53
հե			

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

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op 🕨 My Ca	arts and Orders 🕨 View C	Carts 🕨 Assigned Carts							-⊀D Log
Cart Ma	nagement							C	reate Cart
Draft Ca ssign Subst Filter Ass		s 🗏 🚺				\			
Type 🛆	Cart Number 🗠	Shopping Cart Name 🗠	Cart Description	Date Created 🔺	Total 🛆	Created By 스	Assign To 🛆	ied	Action
Normal	138289768 Active	2020-11-21 0600001		11/21/2020	4.69 USD	Michael Phillips	Migue		Viev
								ım	

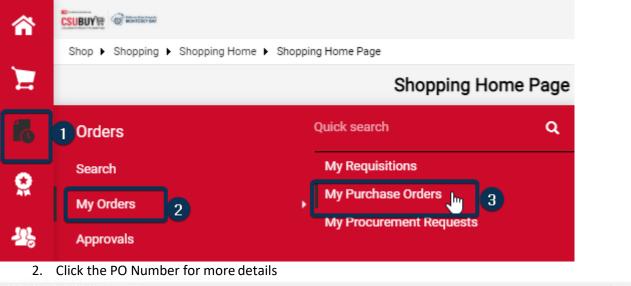
The Cart Management screen can also be used to delete carts from either the "Draft carts" or "Assigned Carts" section by selecting the delete option shown above.





How to Access Your Past Orders and Check Status

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



My Purchase 0	rders Save As 🔻						Export 💌
Created Date: Last 90	days - Quick search	(Add Filte	r Clear All Filters			
1-2 of 2 Results							🗢 20 Per Page 🕶
II PO Number	Supplier	Created Date/Time 🔻	PO Status	Requisition Number	Prepared For	Shipment Status	Total Amount 🗢
3109530	Staples Advantage (1)	5/12/2020 1:54:59 PM	Completed	2960932		Sent To Supplier	60.38 USD
3109529	CDWG (0	5/12/2020 1:54:59 PM	Completed	2960932		Sent To Supplier	1,168.84 USD

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

Status Summary Revisions 🕕 Comments Attachments History

General Information		~	Completed	
PO/Reference No.	3109530		Total (60.38 USD)	~
Revision No.	0		Subtotal	60.38
Supplier Name	Staples Advantage		Тах	0.00
Purchase Order Date	5/12/2020		Shipping	0.00
Total	60.38		Handling	0.00
Owner Name				60.38
Owner Phone				
Owner Email			Related Documents	~
Requisition Number			Requisitions: 2960932	
Document Status		•	What's next? Next Step Revise PO	v
A/P status	Open A		Approvers Automatically calc system	ulated by
Workflow	Completed (\$/12/2020 1:55 PM)		Workflow	
The system distributed the purchase	order using the method(s) indicated below the last time it was distributed:		Submitted	
cXML (Electronic Integration)	no value		S/12/2020 1 54 PM Kimberley Holmberg	
Manual				
Distribution Date/Time	5/12/2020 1:55 PM		Revise PO Completed	1
Supplier	Sent To Supplier		Y	
	view		PO Distribution	÷
			Completed 5/12/2020 1:55 PM	