

THE TEXAS
STATE
UNIVERSITY
SYSTEM



TSUS Marketplace

USER GUIDE

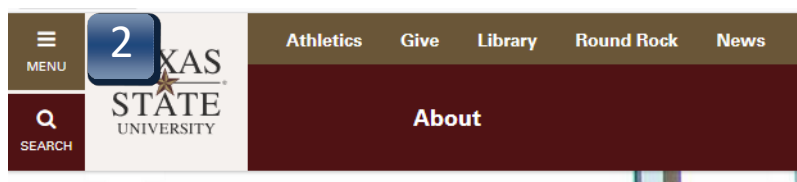
TEXAS  STATE[®]
UNIVERSITY
SAN MARCOS
The rising STAR of Texas

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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



3

NetID

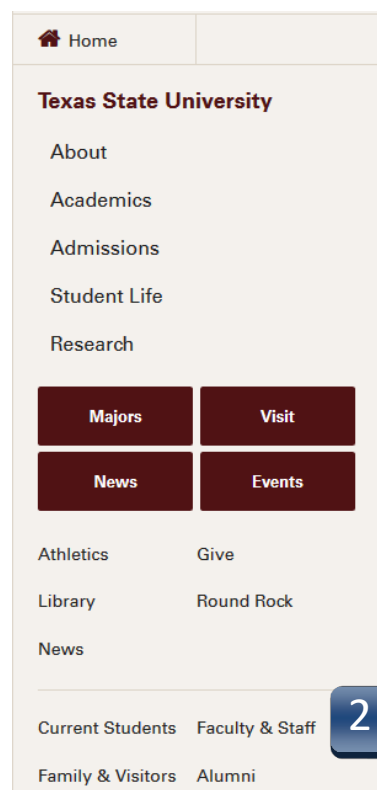
Forgot your password?

Password

Activate your NetID

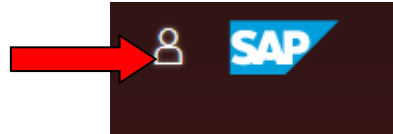
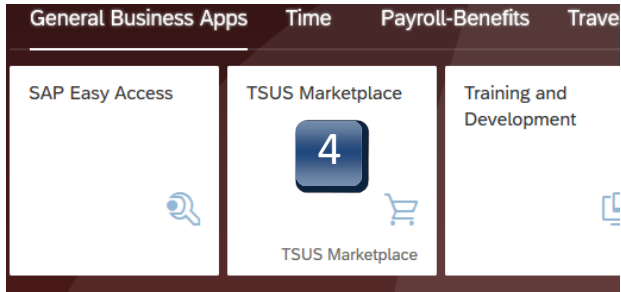
Login

Use of computer and network facilities owned or operated by Texas State University requires prior authorization. Unauthorized access is prohibited. Usage may be subject to security testing and monitoring, and affords no privacy guarantees or expectations except as otherwise provided by applicable privacy laws. Abuse is subject to criminal prosecution. Use of these facilities implies agreement to comply with the policies of Texas State University.



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 displays the TSUS Marketplace home page. The interface includes a top banner (C) with a user profile 'Judi Nicholson', a shopping cart icon, and a search bar. A side navigation menu (B) is located on the left, featuring icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. The main workspace (A) is divided into several categories: Science & Research, Technology, Office & Furniture Suppliers, and Maintenance & Repair (MRO). Each category contains a grid of supplier logos and names, such as Fisher Scientific, ThermoFisher Scientific, Airgas, YWRA International, BIO-RAD, Dell, HUBS, BH, PDWG, Connection, shi, Graybar, ANIXER, Apple, GT Distributors, INC, HOWARD, HBI, STAPLES, ROCKFORD, FedEx Office, business interiors, GRAINGER, SUPPLY, GUARDIAN, MCCOY'S, Sherwin-Williams, FASTENAL, and WESCO. The page also features a search bar at the top and a 'Go' button.

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.

1 Melisse Shepherd

Shop Everything

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts

Science & Research

Melisse Shepherd

User Name MFS46

User Profile and Preferences

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

Language, Time Zone and Display Settings

Default User Settings

User Roles and Access

Notification Preferences

3

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

First Name Melisse

Last Name Shepherd

Phone Number

Country Code, Area, Phone Number, Extension

E-mail Address MFS46@TXSTATE.EDU

Department

User Name MFS46

Authentication Method LoginXML

Save

User Roles and Access

Assigned Roles

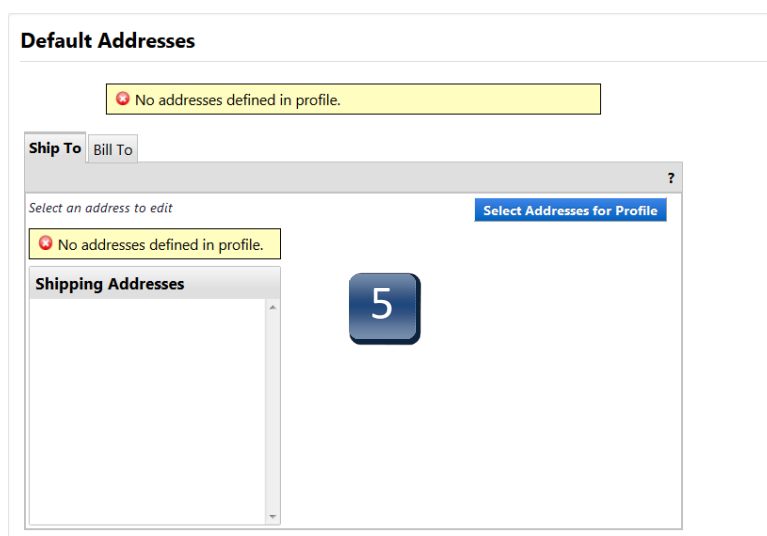
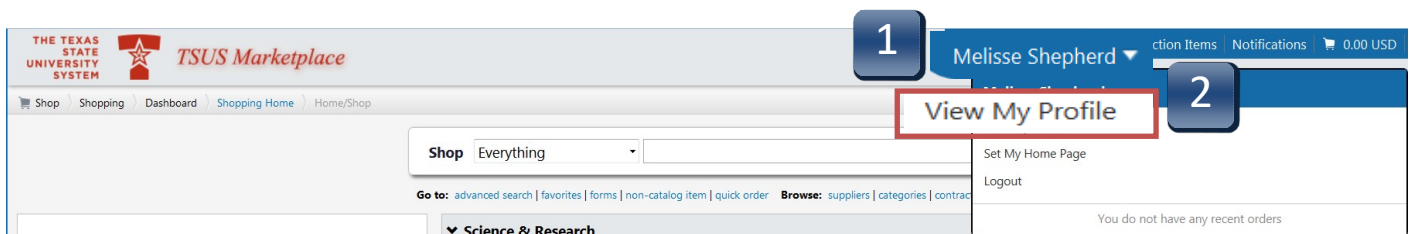
Access

Assigned Roles

Shopper

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 tabs: 'Ship To' and 'Bill To'. A blue button labeled 'Select Addresses for Profile' is visible. A blue box with the number '6' points to this button. Below the tabs, there is a 'Shipping Addresses' section with a message 'No addresses defined in profile.' and a 'Select Address Template' dropdown menu. The dropdown menu is open, showing a list of address templates: CHA, CRC, DHRL, ETS, FAC, FCS, HRL, KAP, MSE, OHC, RRHEC, RRSON, SBDC, SHC, SHC-P, STAR, TJCTC, TSUS, and UDC. A blue box with the number '7' points to the dropdown menu. Red boxes highlight the 'RRHEC', 'RRSON', and 'UDC' options in the list.

Default Addresses

No addresses defined in profile.

Ship To **Bill To**

Select an address to edit

No addresses defined in profile.

Shipping Addresses

Select Address Template

Select Address Template

CHA
CRC
DHRL
ETS
FAC
FCS
HRL
KAP
MSE
OHC
RRHEC
RRSON
SBDC
SHC
SHC-P
STAR
TJCTC
TSUS
UDC

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**.

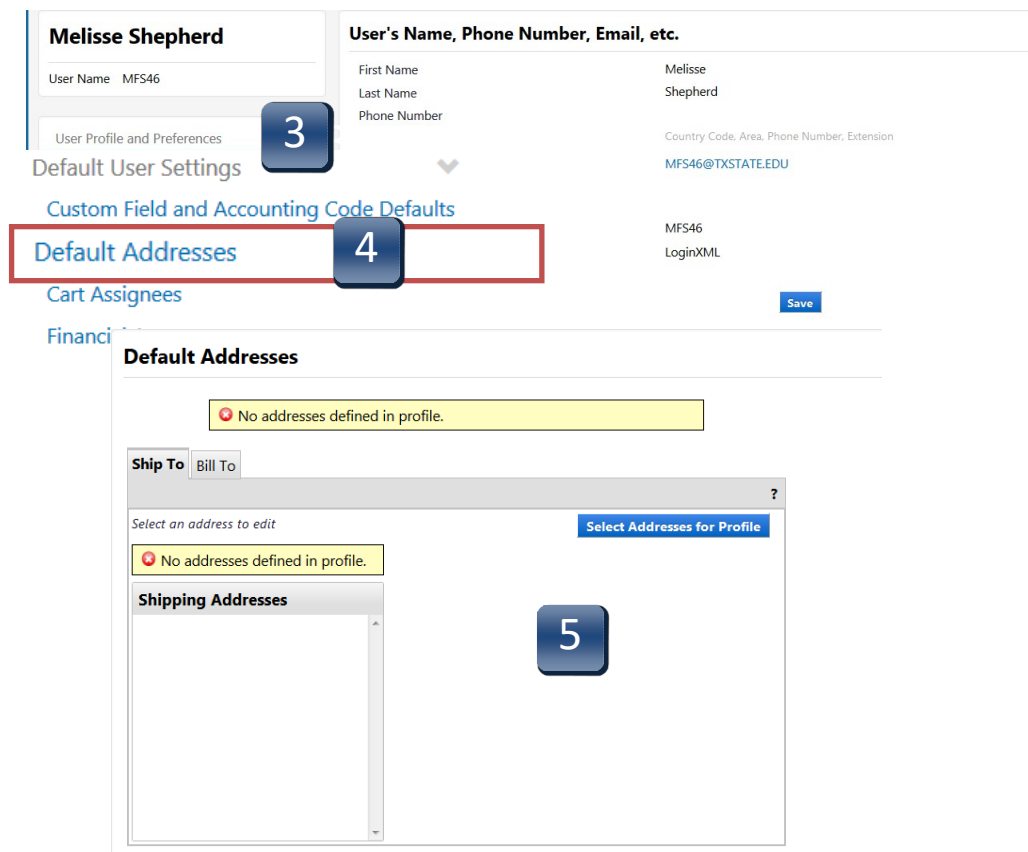
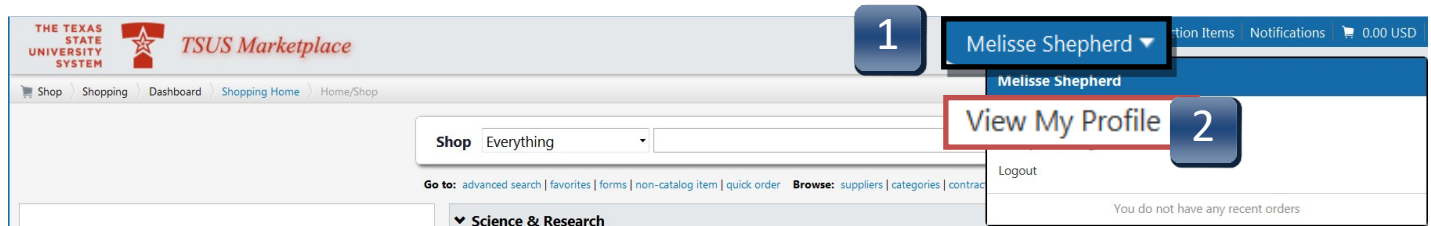
STEP 11: Newly saved address will populate **Shipping Addresses** menu.

The screenshot displays a web interface for editing a shipping address. On the left, a 'Shipping Addresses' sidebar lists 'UDC' with a callout '11'. The main 'Edit Selected Address' panel contains the following fields:

- Nickname:** UDC (Callout 8)
- Default:** ☒
- Current Default Address:** ---
- ADDRESS Section:**
 - Contact Line 1:** Melisse Shepherd
 - Room:** 527 (Callout 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:** (Callout 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 image contains two screenshots illustrating the steps to reach the Notification Preferences page.

The top screenshot shows the TSUS Marketplace home page. In the top right corner, a user profile dropdown menu is open, showing the user's name "Melisse Shepherd" and a "View My Profile" link. A blue box with the number "1" highlights the user's name, and another blue box with the number "2" highlights the "View My Profile" link.

The bottom screenshot shows the "My Profile" page. On the left, a sidebar menu lists various settings, including "User Profile and Preferences", "User's Name, Phone Number, Email, etc.", "Language, Time Zone and Display Settings", "Default User Settings", "User Roles and Access", "Ordering And Approval Settings", "Permission Settings", "Notification Preferences", and "User History". A blue box with the number "3" highlights the "Notification Preferences" link. On the right, the "User's Name, Phone Number, Email, etc." section is visible, showing fields for First Name, Last Name, Phone Number, E-mail Address, and User Name. A blue box with the number "4" highlights the "Notification Preferences" link in the sidebar.

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

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.

The screenshot shows the TSUS Marketplace user profile setup page. At the top, the user's name 'Melisse Shepherd' is displayed with a dropdown arrow (callout 1). Below this, a 'View My Profile' button is highlighted with a red box and callout 2. The left sidebar contains a list of settings, with 'Default User Settings' expanded and 'Custom Field and Accounting Code Defaults' selected (callout 3). The main content area shows the 'User's Name, Phone Number, Email, etc.' section with fields for First Name, Last Name, Phone Number, Country Code, Area, Phone Number, Extension, E-mail Address, User Name, and Authentication Method. A 'Save' button is at the bottom right (callout 4). The bottom section is titled 'Custom Field and Accounting Code Defaults' and contains a table with columns: Custom Field Name, Default Value, Description, and Edit Values (callout 5).

Custom Field Name	Default Value	Description	Edit Values
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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

6			
Header Codes Code Favorites			
?			
Custom Field Name	Default Value	Description	Edit Values
Account Assignment Category	No Default Value		Edit 7
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

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.

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' tab in a system interface. At the top, there are tabs for 'Header (int.)', 'Codes', and 'Code Favorites'. Below these is a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The first row shows 'Account Assignment Category' with a 'No Default Value' and an 'Edit' button. Below the table is an 'Edit Values' section with a 'Close' button. A 'Create New Value' button is highlighted with a blue box and a '2' in a blue circle. To the right of this button is a 'Values' section with a table of values. The table has columns 'Value' and 'Description'. The values listed are: A (Asset), F (Internal Order), K (Cost Center), P (WBS), and S (Statistical Internal Order). The 'K' row is highlighted with a red box and a '3' in a blue circle. Below the 'Values' table is an 'Add Values' button, which is highlighted with a blue box and a '4' in a blue circle. On the left side of the 'Values' section, there is a table with columns 'Value' and 'Description'. The first row shows 'K' and 'Cost Center'. This table is also highlighted with a blue box and a '4' in a blue circle. At the bottom of the 'Codes' tab, there 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.'

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 ?

<input type="checkbox"/>	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

3

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 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 'Edit Values' window for the 'Fund' custom field. The window has a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The 'Fund' row shows 'No Default Value' and an 'Edit' button. Below the table is a 'Create New Value' button (step 2) and a 'Search For Value' box (step 3). The 'Search For Value' box contains fields for 'Field Name' (Fund), 'Value' (2000011020), 'Description', and 'Results Per Page' (5). A 'Search' button (step 3) is at the bottom of the search box. Below the search box is a 'Results' section showing 'Values Found' (1) and a table with columns 'Value' and 'Description'. The table contains one row: 2000011020, Des Method. A 'Select' checkbox is checked next to this row. Below the table are 'Add Values' (step 4) and 'Back to Search' buttons. A 'Close' button is in the top right of the window. 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

2000011020 Des Method

* 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

Description

Results Per Page 5

Search

Results Values Found 1 Page 1 of 1

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

Add Values Back to Search

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:

Description:

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.

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

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 **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.

The screenshot shows the 'Edit Existing Value' dialog box. At the top, there is a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The first row shows 'Cost Center', '1410140000', 'Procurement', and an 'Edit' button. Below this table, there is a 'Fund' dropdown menu with '2000011020' selected, a 'Create New Value' button, and a 'Close' button. The 'Create New Value' button is highlighted with a blue box and a callout '3'. The 'Fund' dropdown is highlighted with a blue box and a callout '2'. The 'Close' button is highlighted with a blue box and a callout '6'. Below the 'Create New Value' button, there is a table with columns: Value and Description. The first row shows '1410140000' and 'Procurement'. This table is highlighted with a blue box and a callout '5'. To the right of the 'Create New Value' button, there is an 'Edit Existing Value' dialog box. This dialog box has fields for 'Value' (1410140000), 'Description' (Procurement), 'Default' (checked), and 'Status' (active). The 'Value' field is highlighted with a blue box and a callout '4'. The 'Description' field is highlighted with a blue box and a callout '4'. The 'Default' checkbox is highlighted with a blue box and a callout '4'. The 'Status' field is highlighted with a blue box and a callout '5'. Below the 'Status' field, there is a 'Save' button and a 'Close' button. The 'Save' button is highlighted with a blue box and a callout '5'. The 'Close' button is highlighted with a blue box and a callout '6'. At the bottom of the dialog box, there 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.'

Custom Field Name	Default Value	Description	Edit Values
Cost Center	1410140000	Procurement	Edit

✎ Edit Values

Fund 2000011020

Create New Value

Close

Value	Description
1410140000	Procurement

Edit Existing Value

Value 1410140000

Description Procurement

Default ☒

Status active

Save Close

* 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' window. It has fields for 'Field Name' (set to 'Cost Center'), 'Value', 'Description', and 'Results Per Page' (set to 5). A blue 'Search' button is highlighted with a box and a blue circle with the number 7. The second screenshot shows the 'Results' window. It displays 'Values Found' as 1. A table lists results with columns 'Value' and 'Description'. The first result is '1410140000' with description 'Procurement'. A checkbox is checked next to it. A blue 'Add Values' button is highlighted with a box and a blue circle with the number 7.

The third screenshot shows the 'Edit Values' window for 'Cost Center'. It shows 'No Default Value' and an 'Edit' button. A 'Close' button is highlighted with a box. Below, there's a 'Fund' dropdown set to '2000011020' and a 'Create New Value' button. A table shows 'Value' (1410140000) and 'Description' (Procurement). A blue circle with the number 8 is next to the description. The fourth screenshot shows the 'Edit Existing Value' window. It has fields for 'Value' (1410140000), 'Description' (Procurement), 'Default' (checked), and 'Status' (active). A blue circle with the number 9 is next to the 'Default' checkbox. A blue 'Save' button is highlighted with a box and a blue circle with the number 10.

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.

The screenshot illustrates the process of adding a new value to a custom field. The main table at the top shows a custom field named 'Internal Order' with a 'No Default Value' status. Below this, the 'Edit Values' section shows a 'Fund' dropdown set to '2000011020'. The 'Create New Value' button is highlighted with a red box and a blue '3' callout. The 'Search For Value' dialog box is open, showing the 'Field Name' as 'Internal Order' and the 'Value' field containing '5100000009', which is highlighted with a blue '4' callout. The 'Search' button is also highlighted with a blue '4' callout. The 'Results' section shows one result: '5100000009' with the description 'SPF - Football'. The 'Add Values' button is highlighted with a red box and a blue '5' callout. The 'Close' button is visible in the top right of the 'Edit Values' section.

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 Per Page 5 5

Values Found 1 Page 1 of 1 ?

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

Add Values Back to Search 5

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's a tab labeled 'Internal Order' and a yellow banner indicating 'No Default Value'. An 'Edit' button is in the top right. Below the banner, there's a section titled 'Edit Values' with a 'Fund' dropdown set to '2000011020' and a 'Create New Value' button. A table lists values, with '5100000009' and 'SPF - Football' selected. A blue box with the number '6' is overlaid on the table. To the right, the 'Edit Existing Value' dialog is open, showing fields for 'Value' (5100000009), 'Description' (SPF - Football), 'Default' (checked), and 'Status' (active). A blue box with the number '7' is overlaid on the 'Default' checkbox. At the bottom of the dialog, there's a 'Save' button (with a blue box '8' over it) and a 'Close' button (with a blue box '9' over it). A footer note says '* Custom Field Values marked'.

Value	Description
5100000009	SPF - Football

* Custom Field Values marked

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

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:** 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.

The screenshot shows the 'Codes' tab in a system interface. At the top, there are tabs for 'Header (int.)', 'Codes', and 'Code Favorites'. Below these is a table with columns: 'Custom Field Name', 'Default Value', 'Description', and 'Edit Values'. The table contains one row for 'G/L Account' with 'No Default Value' and an 'Edit' button. Below the table is an 'Edit Values' button. To the left, there is a 'Create New Value' button. To the right, there is a 'Search For Value' dialog. The dialog has fields for 'Field Name' (G/L Account), 'Value' (730000), and 'Description'. It also has a 'Results Per Page' dropdown set to 5 and a 'Search' button. Below the dialog, there is a 'Results' dialog showing 'Values Found' as 1. The results table has columns 'Select', 'Value', and 'Description'. It shows one result for '730000' with 'Consumable Supplies'. There are 'Add Values' and 'Back to Search' buttons. A red box contains a warning: '**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.**'

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

1 Create New Value

2 Search For Value

3 Value: 730000, Search

4 Add Values

5 Close

* Custom Field Values

Results
Values Found: 1
Page 1 of 1

Select	Value	Description
<input checked="" type="checkbox"/>	730000	Consumable Supplies

Add Values Back to Search

****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

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:** 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.

The screenshot shows the 'Edit Existing Value' dialog box. At the top, there is a table with columns: Custom Field Name, Default Value, Description, and Edit Values. The first row shows 'Storage Location', 'JCKP', 'Purchasing', and an 'Edit' button. Below this table is a 'Create New Value' button (callout 2) and a table with 'Value' and 'Description' columns. The first row in this table is 'JCKP' and 'Purchasing' (callout 5). Below the table is a note: '* Custom Field Values marked'. To the right of the 'Create New Value' button is a 'Close' button (callout 5). The 'Edit Existing Value' dialog box has a title bar with a question mark. It contains fields for 'Value' (JCKP, callout 3), 'Description' (Purchasing), 'Default' (checked, callout 4), and 'Status' (active). At the bottom are 'Save' (callout 5) and 'Cancel' buttons.

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

Edit Values

Create New Value 2

Value	Description
JCKP	Purchasing

5

* Custom Field Values marked

Close 5

Edit Existing Value ?

Value JCKP 3

Description Purchasing

Default ☒ 4

Status active

Save 5 Cancel

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

Results Per Page: 5

Page: 28 of 53

Values Found: 263

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

Add Values **Back to Search**

Storage Location: No Default Value

Edit

Edit Values

Create New Value

Value	Description
JCKP	Purchasing

7

Edit Existing Value

Value: JCKP

Description: Purchasing

Default: ☒ 8

Status: active

Save 9

Close 10

* 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**.

1 Staples/ Summus HUB

2 Post-it® Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30"H x 25"W, 2/Ct
Customer Item # 506808
Staples Item # 506808
MFR Item # 560
Qty. 3
\$36.55
Add to Cart

3 1 Item \$109.65
View Checkout

4 Your Shopping Cart : Review Item Information

Item	Item Total
Post-it® Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30"H x 25"W, 2/Ct Customer Item # 506808 Staples Item # 506808 MFR Item # 560 Qty: 3 Check Delivery Date	\$36.55 \$109.65

Order Summary

Subtotal:	\$109.65
Total:	\$109.65

Continue shopping Clear cart Update cart 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 user is logged in as Brittany Baker. 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 amount is 109.65 USD. The interface includes a navigation bar, a shopping cart summary, and a list of items with their details.

Shopping Cart Summary:

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

Buttons: Proceed to Checkout or Assign Cart

Item Details:

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

Item Information:

- Item added on: Dec 17, 2013
- Part Number: 506808
- Manufacturer Info: 560 - (3M Corporation)
- Commodity Code: Office Equipment and Supplies

Search & Order - Hosted Vendors

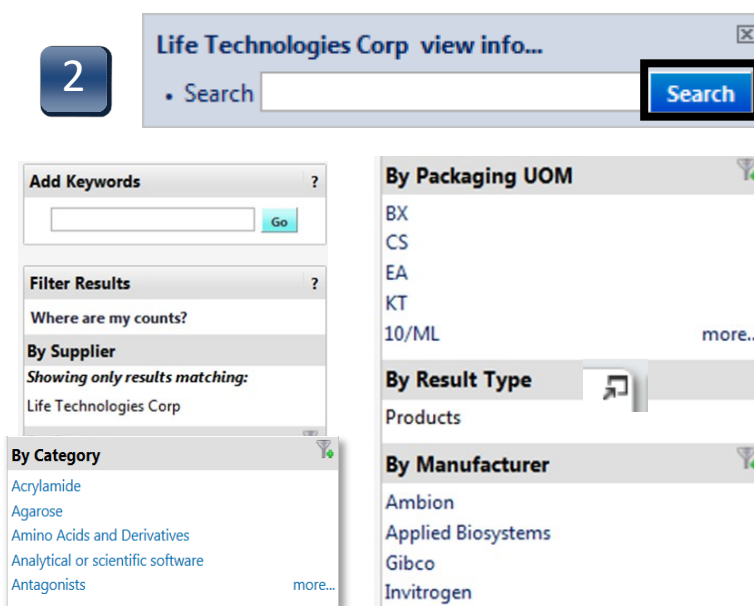
STEP 1: Click supplier's catalog button.

**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.

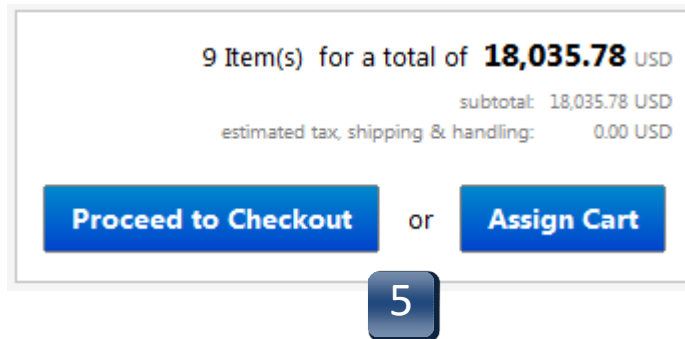
STEP 3: Enter **quantity** desired, then press **Add to Cart**.



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 'Shop' dropdown menu set to 'Everything', a 'Go' button, and a link to 'advanced search'. Below this is a breadcrumb trail: 'Go to: favorites | forms | non-catalog item | quick order | Browse: suppliers | categories | contracts | chemicals'. The 'non-catalog item' link is highlighted with a red box and a red arrow pointing to it, with a blue callout box labeled '1' next to it.

The main form area is titled 'Non-Catalog Item' and contains several sections:

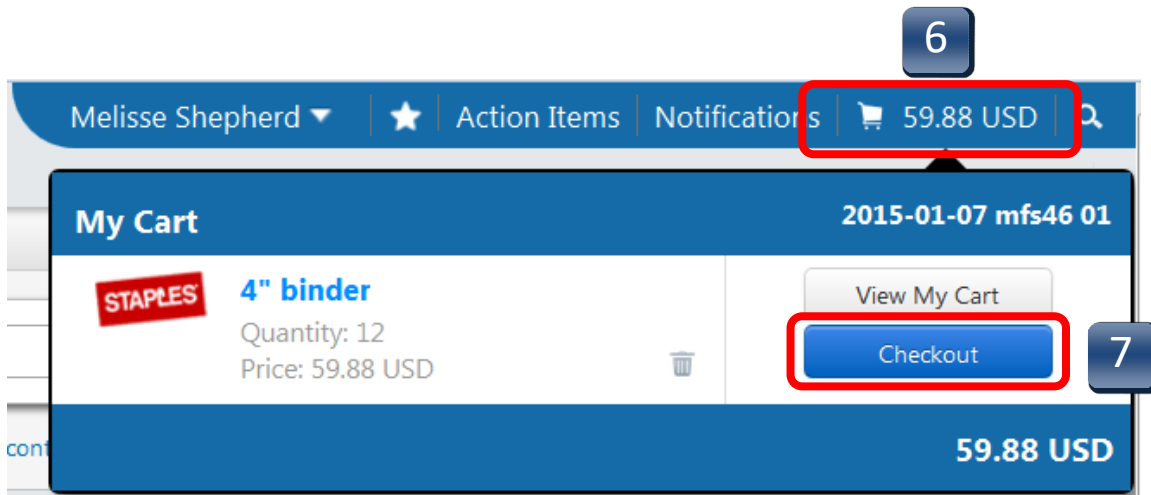
- Enter Supplier:** A text input field with a blue callout box labeled '2' next to it.
- Product Description:** A text input field.
- Catalog No.:** A text input field.
- Quantity:** A text input field.
- Price Estimate:** A text input field.
- Packaging:** A dropdown menu currently showing 'EA', with a blue callout box labeled '3' next to it.
- Product Details:** A section with 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 box labeled '4' is next to this list.
- Buttons:** At the bottom, there are two buttons: 'Save and Close' (with a blue callout box labeled '5B' next to it) and 'Save and Add Another' (with a blue callout box labeled '5A' next to it).

At the bottom left of the form, there is a blue bar with icons for a star, a flag, a bell, and a shopping cart. The shopping cart icon is highlighted with a red box, and the text '0.00 USD' is displayed next to it.

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

Name this cart:

Have you made changes?  [Help](#) | |

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

or

 **Staples/Summus**  [more info...](#)

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
<div>Item added on Jun 26, 2013</div> <div><input type="button" value="Remove"/></div> <div>Post-it Self-Stick Easel Pad, 30 Sheets, Grid Ruled, White, 30"H x 25"W, 2/Ct</div> <div>Part Number 506808</div> <div>Manufacturer Info 560 - (3M Corporation)</div> <div>Commodity Code <input type="text" value="Office Equipment and"/></div>	36.55 USD CT	3	109.65 USD

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 (with a green checkmark), Shipping (with a red triangle), Billing (with a red triangle), Accounting Codes (with a red triangle), Internal Notes and Attachments (with a green checkmark), External Notes and Attachments (with a green checkmark), Purchasing Use Only (with a green checkmark), and Final Review (with a red triangle). Below the navigation bar, a yellow box contains a green checkmark and the 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 contains a yellow warning triangle and the text: "You need to be aware of the following issue(s), but it will not prevent you from submitting your request." followed by a bullet point: "Empty field: [Description](#)". To the right of this box is a blue square with the number "1". Below the warning box, there are tabs for Requisition, PR Approvals, PO Preview, Comments, Attachments, and History. Under the Requisition tab, there are sub-tabs: Summary, Shipping, Billing, Accounting Codes, Supplier Info, and Taxes/S&H. The main content area shows the "General" tab with a form. The form has a title "General" and a subtitle "These values apply to all lines unless specified by line item". The form fields are: Cart Name (2020-01-30 jn11 01), Description (no value), Priority (Normal), Prepared by (Judi Nicholson), and Prepared for (Judi Nicholson). There are "edit" buttons next to the Cart Name and Description fields. A blue square with the number "2" is positioned below the form. To the right of the form, there is a "General" tab with a form. The form fields are: Cart Name (2020-01-29 jn11 01), Description (Empty field), Priority (Normal), Prepared by (Judi Nicholson), and Prepared for (Judi Nicholson). There is a "Select a different user..." link below the Prepared for field. At the bottom of this form, there are "Save" and "Cancel" buttons. The "Save" button is highlighted with a red box.

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 displays the 'Shipping' tab in a procurement system. At the top, a navigation bar includes tabs for '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 the banner are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Under 'Requisition', sub-tabs include 'Summary', 'Shipping', 'Billing', 'Accounting Codes', 'Supplier Info', and 'Taxes/S&H'.

Three overlapping windows are shown with numbered callouts:

- Callout 1:** Points to the 'Shipping address' field in the 'Shipping' window, which has a 'Required field' error icon.
- Callout 2:** Points to the 'select from org addresses' link in the 'Shipping address' field of the 'Ship To' window.
- Callout 3:** Points to the 'Address Details' section in the 'Ship To' window, which includes fields for 'Contact Line 1 *', 'Room *', 'Bldg *', 'Address Line 1', 'Address Line 2', 'City', 'State', 'Zip Code', and 'Country'.
- Callout 4:** Points to the 'Save' button at the bottom of the 'Ship To' window.

A fourth window, 'Address Search', is also visible, featuring a search bar with the placeholder 'Nickname / Address Text' and a 'Search' button.

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**.

The screenshot shows the 'Billing' tab in a software interface. At the top, there is a navigation bar with tabs: General, Shipping, Billing (highlighted), Accounting Codes, 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.' with a bullet point: 'Required field: Billing address'. The main content area has tabs: Requisition, PR Approvals, PO Preview, Comments, Attachments, History, Summary, Shipping, Billing (selected), Accounting Codes, Supplier Info, and Taxes/S&H. The 'Billing' tab is active, showing a 'Billing address' field with a 'Required field' error message and a blue box with the number '1'. Below this, a dropdown menu for 'Billing address' is open, showing 'BillTo' as the selected option, with a blue box with the number '2'. At the bottom, a 'Save' button is highlighted with a blue box and the number '3'. The 'Bill To' dialog box is also visible, showing the 'Billing address' field with a dropdown menu, and the 'Address Details' section with fields for Contact Line 1, Address Line 1, City, State, Zip Code, and Country. The 'Save this address for future use' checkbox is also present.

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

Items | Add to Favorites

Go

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

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.

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

Other Information

Account Assignment Category Storage Location

Select from all values... Required field 1

Select from all values... Required field

Save Cancel

Other Information

Account Assignment Category

A 2 JCKP 2

Select from all values... Required field Select from all values... Required field

3 Save Cancel

Fund Cost Center Internal Order WBS Element G/L Account

Required field 4 no value no value no value no value Required field

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** points to the **Fund** field, which contains '2000011020' and a 'Select from all values...' link.
- 7** points to the **Cost Center** field, which contains '1410140000' and two links: 'Select from profile values...' and 'Select from all values...'.
- 6** points to the **G/L Account** field, which contains '737800' and a 'Select from all values...' link.
- 8** points to the **Save** button.

6

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.

General	Shipping	Billing	Accounting Codes	Internal Notes and Attachments	External Notes and Attachments	Purchasing Use Only	Final Review																																																								
<p align="center">Accounting Codes</p> <p align="center"><small>These values apply to all lines unless specified by line item</small></p> <table border="1"> <tr> <td colspan="2">Account Assignment Category</td> <td colspan="6">Storage Location</td> </tr> <tr> <td colspan="2"> <div>Required field</div> <div>1</div> </td> <td colspan="6"> <div>no value</div> <div>Required field</div> </td> </tr> <tr> <td>Purchasing Group</td> <td>PO Type</td> <td>Limit</td> <td>Expected Value</td> <td>Overall Limit</td> <td>Valid Start Date (Enter MMDDYYYY)</td> <td>Valid End Date (Enter MMDDYYYY)</td> <td>edit</td> </tr> <tr> <td>CPO</td> <td>BC</td> <td>no value</td> <td>no value</td> <td>no value</td> <td>no value</td> <td>no value</td> <td></td> </tr> <tr> <td>Central Purchasing Office</td> <td>Bobcatlog Local</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fund</td> <td>Cost Center</td> <td>Internal Order</td> <td>WBS Element</td> <td>G/L Account</td> <td>Asset</td> <td>Asset Sub-Number</td> <td>edit</td> </tr> <tr> <td> <div>Required field</div> <div>5</div> </td> <td></td> <td>no value</td> <td>no value</td> <td> <div>no value</div> <div>Required field</div> </td> <td>no value</td> <td>no value</td> <td></td> </tr> </table>								Account Assignment Category		Storage Location						<div>Required field</div> <div>1</div>		<div>no value</div> <div>Required field</div>						Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)	edit	CPO	BC	no value	no value	no value	no value	no value		Central Purchasing Office	Bobcatlog Local							Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number	edit	<div>Required field</div> <div>5</div>		no value	no value	<div>no value</div> <div>Required field</div>	no value	no value	
Account Assignment Category		Storage Location																																																													
<div>Required field</div> <div>1</div>		<div>no value</div> <div>Required field</div>																																																													
Purchasing Group	PO Type	Limit	Expected Value	Overall Limit	Valid Start Date (Enter MMDDYYYY)	Valid End Date (Enter MMDDYYYY)	edit																																																								
CPO	BC	no value	no value	no value	no value	no value																																																									
Central Purchasing Office	Bobcatlog Local																																																														
Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number	edit																																																								
<div>Required field</div> <div>5</div>		no value	no value	<div>no value</div> <div>Required field</div>	no value	no value																																																									

Other Information	
Account Assignment Category	
<div>K</div> <div>Select from all values...</div> <div>Required field</div> <div>2</div>	<div>3</div> <div>JCKP</div> <div>Select from all values...</div> <div>Required field</div>
<div>Save</div> <div>4</div>	

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 Cost Center Internal Order WBS Element G/L Account Asset Asset Sub-Number add split

recalculate / validate

Save Cancel

Accounting Codes

Fund Cost Center Internal Order WBS Element G/L Account

2000011020 1410140000 730000

Select from all values... Required field

6 7 8

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.

General	Shipping	Bill	Accounting Codes	Internal Notes and Attachments	External Notes and Attachments	Purchasing Use Only	Final Review
Other Information							
Account Assignment Category				Storage Location			
<div>Required field</div> <div>1</div>				<div>Select from all values...</div> <div>Required field</div>			
				<div>Save</div> <div>Cancel</div>			

Other Information					
Account Assignment Category					
<div>F</div> <div>Select from all values...</div> <div>Required field</div> <div>2</div>		<div>3</div>		<div>JCKP</div> <div>Select from all values...</div> <div>Required field</div>	
				<div>Save</div> <div>4</div>	

Fund	Cost Center	Internal Order	WBS Element	G/L Account
<div>Required field</div> <div>5</div>	no value	no value	no value	<div>no value</div> <div>Required field</div>

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

Save

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: **Required field** 1

Storage Location: **Required field** 3

Save **Cancel**

Other Information

Account Assignment Category: S **Required field** 2

Storage Location: JCKP **Required field** 3

Save 4

Accounting Codes

Fund: **Required field** 5

Cost Center:

Internal Order:

WBS Element:

G/L Account: **Required field**

Asset:

Asset Sub-Number:

Save **Cancel**

recalculate / validate

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**.

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

- Fund:** 2000011020 (Step 6). Below the field is a dropdown arrow and the text 'Select from all values...'. A red asterisk icon and 'Required field' are at the bottom left of the field.
- Cost Center:** 1410140000 (Step 7).
- Internal Order:** 5100000005 (Step 8).
- WBS Element:** (Step 9).
- G/L Account:** 730000 (Step 9). Below the field is a dropdown arrow and the text 'Select from all values...'. A red asterisk icon and 'Required field' are at the bottom left of the field.
- Save:** (Step 10).

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 displays the checkout process with the Accounting Codes tab selected. The form is divided into two main sections: 'Other Information' and 'Accounting Codes'.

Other Information Section:

- Account Assignment Category:** A red 'Required field' icon is highlighted in the first step (1). In the second step (2), the letter 'F' is entered. A 'Save' button is visible at the bottom right of this section.
- Storage Location:** In the third step (3), the code 'JCKP' is entered. A 'Save' button is highlighted in the fourth step (4).

Accounting Codes Section:

- Fund:** A red 'Required field' icon is highlighted in the fifth step (5).
- Cost Center:** A blue step indicator (5) is shown.
- G/L Account:** A red 'Required field' icon is highlighted.
- Asset:** A blue step indicator (4) is shown.
- Asset Sub-Number:** A blue step indicator (4) is shown.

Buttons at the bottom include 'Save' and 'Cancel'.

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
				<div>Save</div>

See Multiple Funding section for instructions on splitting line item

Completing the Checkout Process – Internal Notes and Attachments

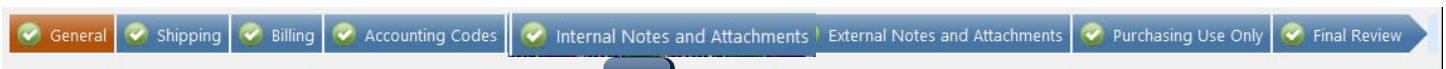
STEP 1: Click on **Internal Notes and Attachments** or **Internal Notes and Attachments** tabs. This is optional.

****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.**

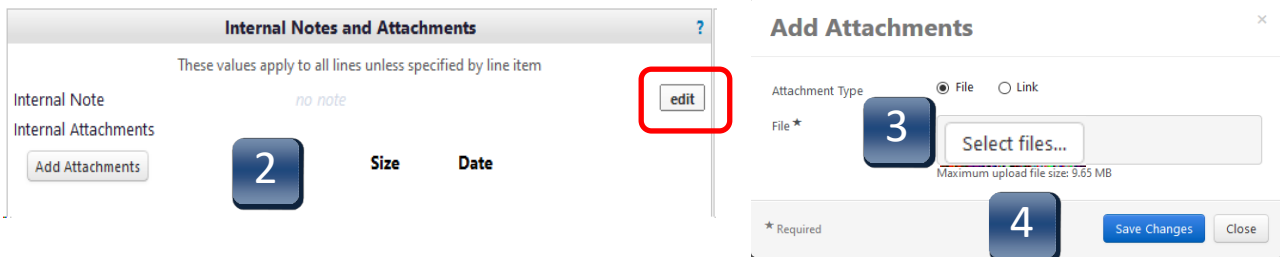
STEP 2: Click on **add attachments** .

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

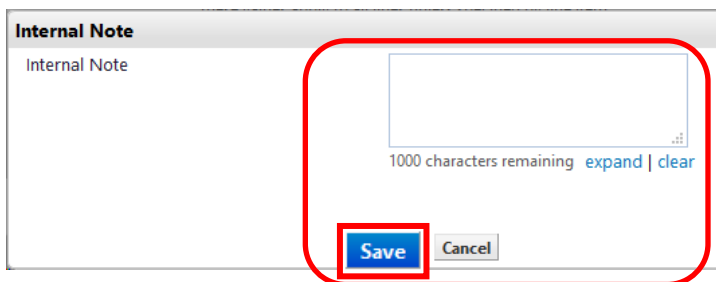
STEP 4: Click **Save Changes**.



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**.

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

External Notes and Attachments

These values apply to all lines unless specified by line item

Note to all Suppliers *no note* **edit**

Attachments for all suppliers **2** **Add Attachments** **Size** **Date**

PO Clauses

001 Texas State University-San Mar.... [view all clauses - \(1\)](#)

Add Attachments

Attachment Type ☒ File ☐ Link

File **3** **Select files...**

Maximum upload file size: 9.65 MB

4 **Save Changes** **Close**

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

External Info

Note to all Suppliers

1000 characters remaining [expand](#) | [clear](#)

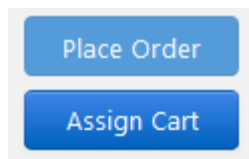
Save **Cancel**

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 displays the 'Accounting Codes' tab within a requisition system. The interface includes a top navigation bar with tabs: Requisition, PR Approvals, PO Preview, Comments, Attachments, History, Summary, Shipping, Bi, Accounting Codes, and Taxes/S&H. A blue box with the number '1' highlights the 'Accounting Codes' tab.

Below the navigation bar, the 'Accounting Codes' section is visible. It contains a table with the following data:

Account Assignment Category	Storage Location
K Cost Center	JCKP Purchasing

Below this table, there is a table with the following data:

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

Below this table, there is a table with the following data:

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

A blue box with the number '2' highlights the 'Asset Sub-Number' field. A red box with the word 'Edit' highlights the 'Edit' button.

Below the table, there is a section titled 'Accounting Codes' with the following data:

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number
2000011020 Select from all values...	1410140000 Select from profile values... Select from all values...	Select from all values...		730000 Select from all values...		

A blue box with the number '3' highlights the 'add split' button. A 'recalculate / validate' button is also visible.

At the bottom, there are 'Save' and 'Cancel' buttons.

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-	% 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>	5 <small>Select from all values...</small>		730000 <small>Select from all values...</small>			0	6 <small>remove</small>
							Split Total 0%	7 <small>add split</small>
							6 <small>recalculate / validate</small>	<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
							6 <small>recalculate / validate</small> <small>show monetary calculations</small>
							Split Total 100%

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 a requisition system. A blue box with the number '1' highlights the 'Accounting Codes' tab. Below the tabs, the 'Accounting Codes' section is visible. A table lists 'Possible Missions- Fisher Scientific' with columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The first row shows 'BEAKER GRIFFIN PA 30ML 12/PK' with a unit price of 57.91 and a quantity of 1 PK. To the right of the table, there are three 'edit' buttons. A blue box with the number '2' highlights the third 'edit' button. Below the table, the 'Accounting Codes' pop-up menu is shown. It has fields for Fund, Cost Center, Internal Order, WBS Element, G/L Account, Asset, and Asset Number. A blue box with the number '3' highlights the 'add split' button. The 'Fund' field contains '2000011020', 'Cost Center' contains '1410140000', and 'G/L Account' contains '730000'. At the bottom of the pop-up, there are 'Save' and 'Cancel' buttons, and a 'recalculate / validate' link.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 BEAKER GRIFFIN PA 30ML 12/PK	0259110AA	PK	57.91	1 PK	57.91 USD

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Number
2000011020	1410140000			730000		

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.

Accounting Codes

Fund	Cost Center	Internal Order	WBS Element	G/L Account	Asset	Asset Sub-Number	Amount
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values...</small> <small>Select from all values...</small>	<small>Select from all values...</small>		730000 <small>Select from all values...</small>			50.00
2000011020 <small>Select from all values...</small>	1410140000 <small>Select from profile values...</small> <small>Select from all values...</small>	<small>Select from all values...</small>		<small>Select from all values...</small>	734000		7.91

Line subtotal: 57.91 USD — Split Total 0

Amount of Price ▼
Amount of Price
% of Price
Amount of Price
Amount of Qty

add split

recalculate / validate

Save **Cancel**

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

Place Order

Assign Cart

2

Assign Cart: User Search

Selected Assignee:

Assign Cart To: [Search for an assignee](#)

Note To Assignee:

Assign Close

3

User Search

Last Name [?] shepherd

First Name [?]

User Name [?]

Email [?]

Department [?]

Role [?]

Results Per Page 10

Search

4

New Search

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

5

Assign Cart: User Search

Selected Assignee: Melisse F Shepherd

Assign Cart To: [Search for an assignee](#)

Add to Profile ☐ Add to Profile


Note To Assignee:

Assign Close

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.

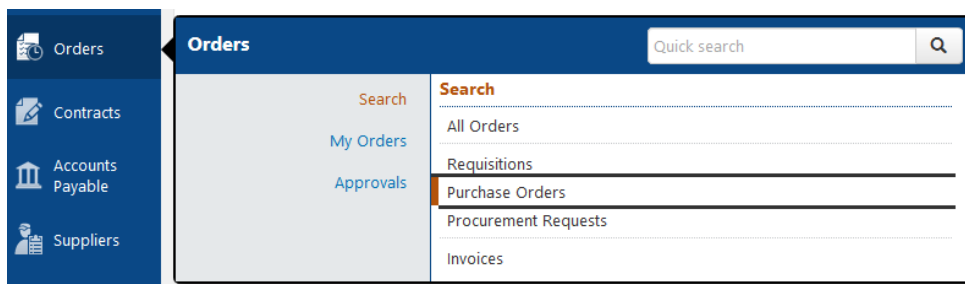
- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

Document Search

Document Search can be used to locate
Purchase Orders and Requisitions

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

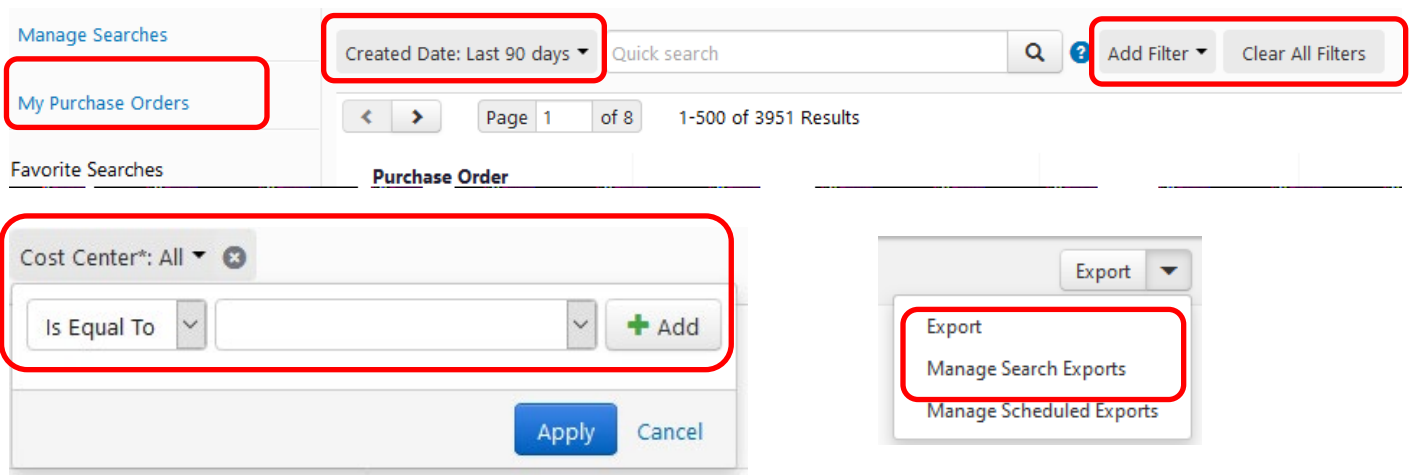
STEP 2: Click on **Search** and choose the type of document you want to search for



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 shows the TSUS Marketplace interface. On the left is a blue sidebar with navigation links: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. The main content area has a header with 'THE TEXAS STATE UNIVERSITY SYSTEM' and 'TSUS Marketplace'. Below the header is a search bar with 'Shop' and 'Everything' selected, and a 'Go' button. A breadcrumb trail reads 'Shop > Shopping > Shopping Home > Home/Shop'. Below the search bar, there are links for 'Go to: advanced search | favorites | forms | non-catalog item | brands | categories | contracts | chemicals'. The 'non-catalog item' link is highlighted with a red box and a blue circle with the number 1. The main content area is divided into two sections: 'Science & Research' and 'Technology'. The 'Science & Research' section includes links for Fisher Scientific, Sigma-Aldrich, ThermoFisher, and Airgas. The 'Technology' section includes links for Dell, Xerox, BH, and GT Distributors, INC. There is also a 'STAPLES' section with a message about scheduling a demo for office chairs.

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**.

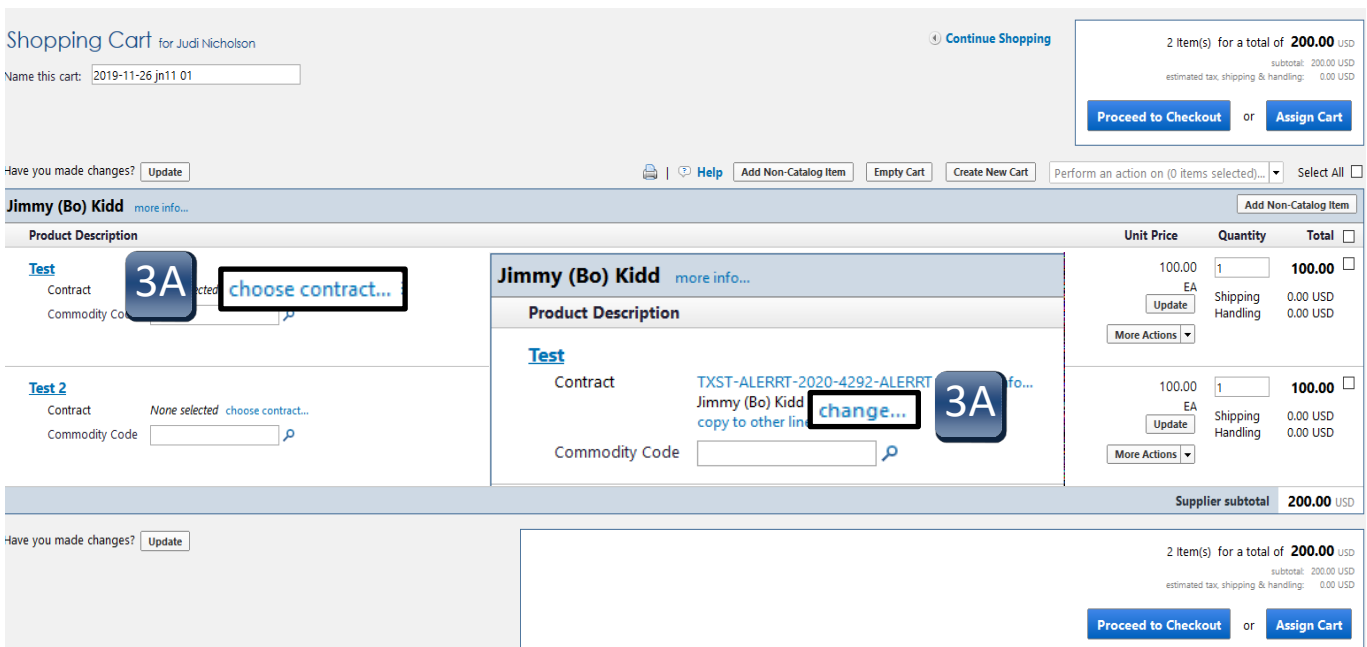
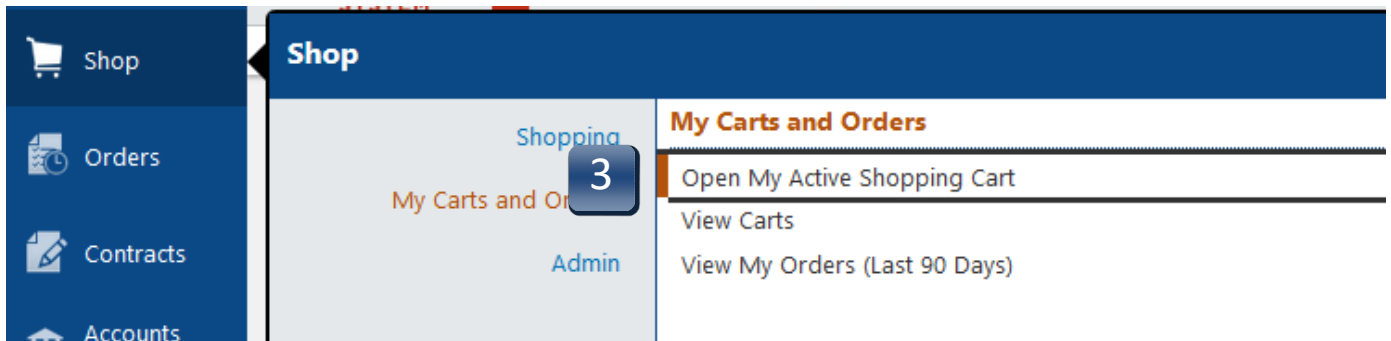
Step 2G: If you are only ordering one item, click **Save and Close** when complete.

The screenshot shows the 'Non-Catalog Item' window. At the top, the title bar says 'Non-Catalog Item' with a question mark and a close button. Below the title bar, the supplier information is displayed: 'JIMMY (BO) KIDD' with a link 'select different supplier' and a blue callout '2'. The address is '100 Brookhollow Dr, Wimberley, TX 78676-2503 US'. There is a section for 'Distribution Methods' with a plus icon. Below this is a table with five columns: 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. The 'Product Description' field contains 'This is a test' with a blue callout '2A' and a '240 characters remaining' indicator. The 'Catalog No.' field is empty with a blue callout '2B'. The 'Quantity' field contains '1' with a blue callout '2C'. The 'Price Estimate' field contains '150.00' with a blue callout '2D'. The 'Packaging' dropdown menu is set to 'EA' with a blue callout '2E'. Below the table is a section for 'Product Details' with a minus icon. It contains a list of checkboxes with corresponding icons: 'Controlled substance', 'Recycled', 'Hazardous material', 'Radioactive', 'Rad Minor', 'Select Agent', 'Toxin', 'Energy Star', and 'Green'. At the bottom of the window, there are three buttons: 'Save and Close' (highlighted with a black box), 'Save and Add Another', and 'Close'. Below the screenshot, there are two blue callouts: '2F' under 'Save and Add Another' and '2G' under 'Save 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)...

Jimmy (Bo) Kidd more info...

Product Description	Unit Price	Quantity	Total
Test Contract TXST-ALERT-2020-4292-ALERT Jimmy (Bo) Kidd change... Commodity Code	100.00 EA	1	100.00
	Shipping 0.00 USD Handling 0.00 USD		
	More Actions		
Test 2 Contract None selected choose contract... Commodity Code	100.00 EA	1	100.00
	Shipping 0.00 USD Handling 0.00 USD		
	More Actions		
Supplier subtotal			200.00 USD

Have you made changes?

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

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
no value Required field	no value Required field

4

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

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.

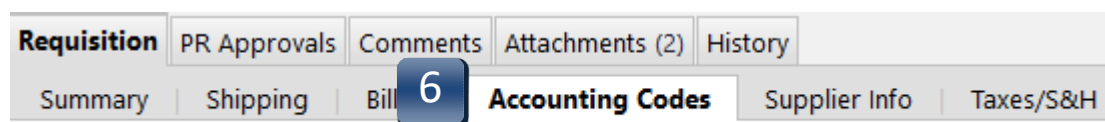
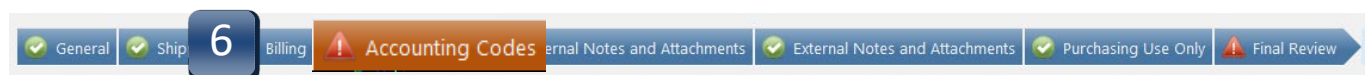
*****It is critical that the dates are entered as shown in the example MMDDYYYY. The framework order will fail and not post into SAP if entered incorrectly.*****

The image displays four sequential screenshots of the SAP Limit Framework Requisition setup process, with numbered callouts 1 through 6 indicating specific fields and actions:

- Information 1:** Shows the 'Account Assignment Category' field (callout 1) and the 'Storage Location' field (callout 2). Both fields have a dropdown menu and a 'Required field' error message. A 'Save' button is highlighted with callout 6.
- Information 2:** Shows the 'Purchasing Group' field (callout 1), 'PO Type' field (callout 2), 'Limit' field (callout 3), 'Expected Value' field (callout 4), 'Overall Limit' field (callout 5), 'Valid Start Date (Enter MMDDYYYY)' field (callout 6), and 'Valid End Date (Enter MMDDYYYY)' field (callout 7). A 'Save' button is highlighted with callout 8.
- Codes:** Shows the 'Fund' field (callout 1), 'Cost Center' field (callout 2), 'Internal Order' field (callout 3), 'WBS Element' field (callout 4), 'G/L Account' field (callout 5), 'Asset' field (callout 6), and 'Asset Sub-Number' field (callout 7). A 'Save' button is highlighted with callout 8.
- Other Information 2:** Shows the 'Purchasing Group' field (callout 1), 'PO Type' field (callout 2), 'Limit' field (callout 3), 'Expected Value' field (callout 4), 'Overall Limit' field (callout 5), 'Valid Start Date (Enter MMDDYYYY)' field (callout 6), and 'Valid End Date (Enter MMDDYYYY)' field (callout 7). A 'Save' button is highlighted with callout 8.

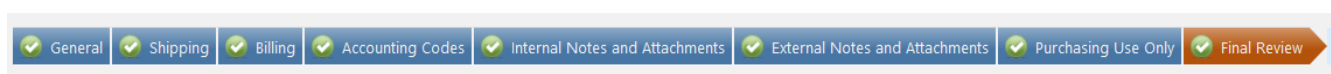
Create a Limit Framework Requisition

- 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	<input type="checkbox"/>
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 contains 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 tabs is a large blue button with the number '8'. Below the tabs, 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'. To the right of the message box are two blue buttons: 'Place Order' and 'Assign Cart'. A small link 'Return to step' is located below the '8' button.