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# Overview

CSUBUY Marketplace is a one stop shop to access preferred suppliers and CSU contract pricing.

CSUBUY Shopper and Requester roles perform several actions related to searching for supplier goods and services, creating shopping carts, placing orders and tracking order status. This guide provides instructions on key features and functionality performed by Shopper and Requester.

If you have any questions regarding access or using CSUBUY, please contact FinanceConnect at [financeconnect@sjsu.edu](mailto:financeconnect@sjsu.edu) or 4-1558.

## CSUBuy Access

SJSU employees can request access to CSUBUY by completing the [CSUBuy Access Request form](#) (hyperlink). One of two CSUBUY roles can be requested:

- Requester- A role given to an employee who is ProCard holder. The Requester can shop and complete payment for purchase.
- Shopper- A role given to an employee **without** a ProCard. The Shopper can shop from CSUBUY and assign (transfer) cart to a designated Requester in their department.

## Login

Log into CSUBUY from [one.SJSU](#).

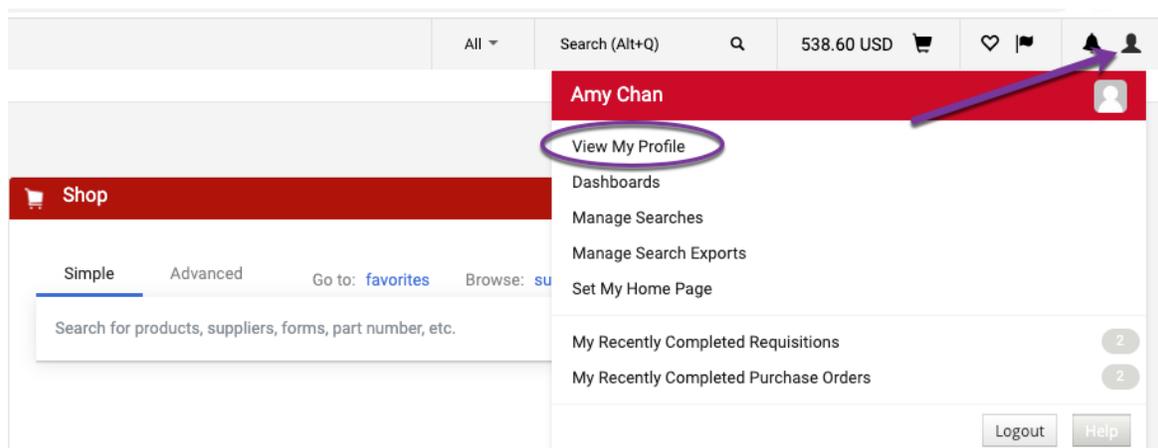
# Add Default ProCard, Ship To, and Bill To Information to Profile

The steps in this section are optional for a Shopper/Requester to complete. The Requester can add their default credit card information, Ship To and Bill To locations in advance or setup them during a purchase. Shoppers can add Ship To and Bill To to their profile, but not credit card since their order will be assigned to a Requester.

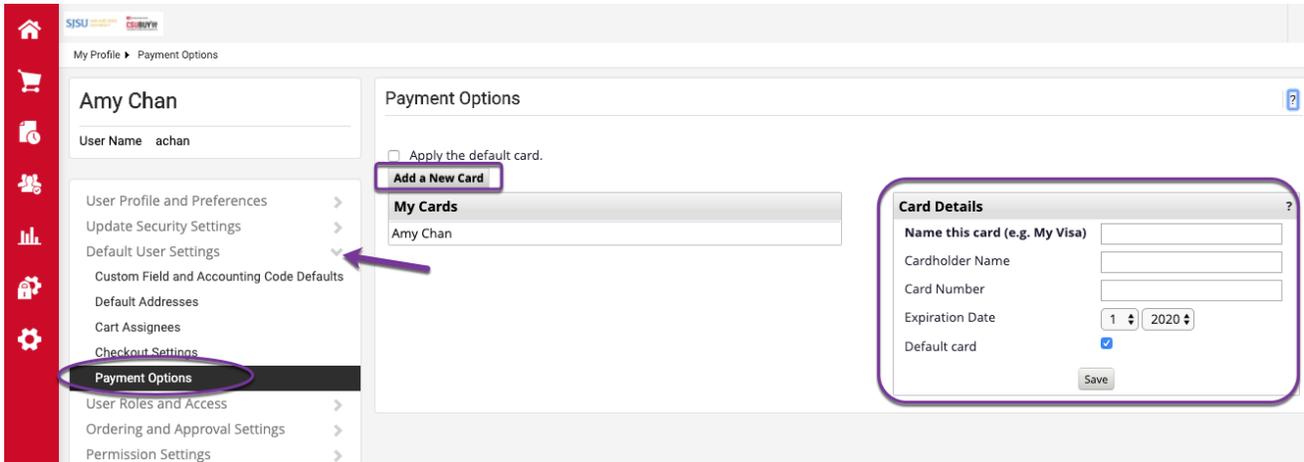
This section demonstrates how to add ProCard, Ship To, and Bill To information to Requester's profile.

## 1: Add a ProCard

1. Click on **Profile** icon.
2. Go to **View My Profile**.

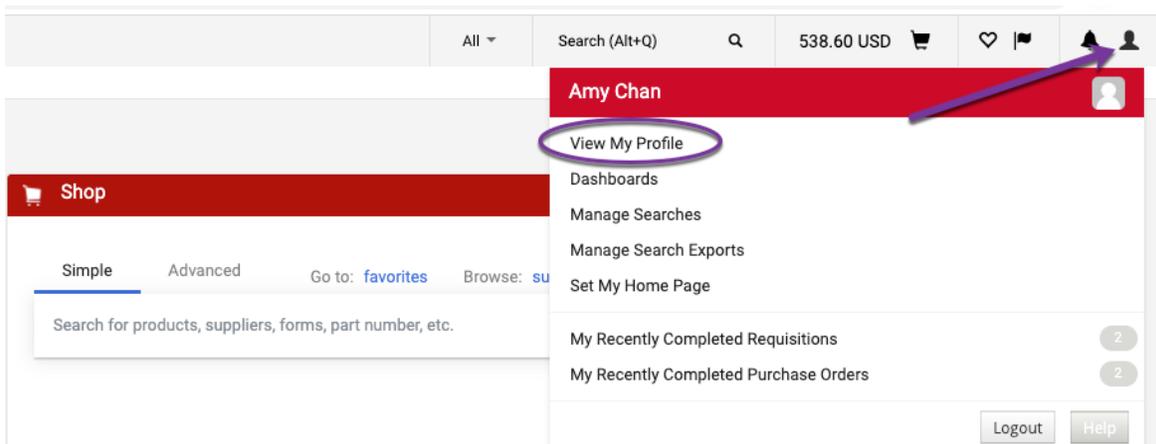


3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Payment Options**.
5. Click **Add a New Card**.
6. The **Card Details** section displays, enter your ProCard information. Though the card is saved in you profile, you will be prompted to enter the 3-digit Card Security Code each time.
7. Check box for **Default Card** to make card your default. You can add multiple cards to your profile, but only one can be your default.
8. Click **Save**.
9. Repeat above to add another card to profile, if needed.



## 2: Add Ship To

1. Click on **Profile** icon.
2. Go to **View My Profile**.



3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Default Addresses**.
5. Click **Ship To** tab.
6. **Select Addresses for Profile**.
7. The **Select Address Template** section displays. Select SJSU location from the dropdown menu in field. **SJSU Distribution Services** represents the main campus address.

The screenshot displays the user profile settings for Amy Test-Chan. On the left, a navigation menu lists various settings, with 'Default Addresses' circled in purple. A purple arrow points from this menu item to the 'Default Addresses' section on the right. The 'Default Addresses' section has a yellow warning box stating 'No addresses defined in profile.' Below this, there are two tabs: 'Ship To' (highlighted with a purple box) and 'Bill To'. Under the 'Ship To' tab, there is a 'Select an address to edit' section with another yellow warning box. A purple arrow points from this warning box to a 'Select Addresses for Profile' button. Below that is a 'Shipping Addresses' section with a 'Select Address Template' dropdown menu, which is also highlighted with a purple box.

8. Check box for **Default** to location as your default. You can add multiple locations to your profile, but only one can be your default.
9. In **Deliver To** field, enter the building and room number where your office is located. Do not abbreviate the building name. Note: If you work in multiple buildings/rooms, it is not necessary to add a new Ship To location for the different buildings/rooms you are in. The **Deliver To** field can be edited during the checkout process.
10. Click **Save**.

**Ship To**
Bill To
?

Select an address to edit

Select Addresses for Profile
Delete Address

✖ No addresses defined in profile.

**Shipping Addresses**

**Edit Selected Address** ?

Nickname

Default

Current Default Address ---

**ADDRESS**

**Attn: \***

Deliver To:

Address Line 1 129 South 10th Street

City San Jose

State CA

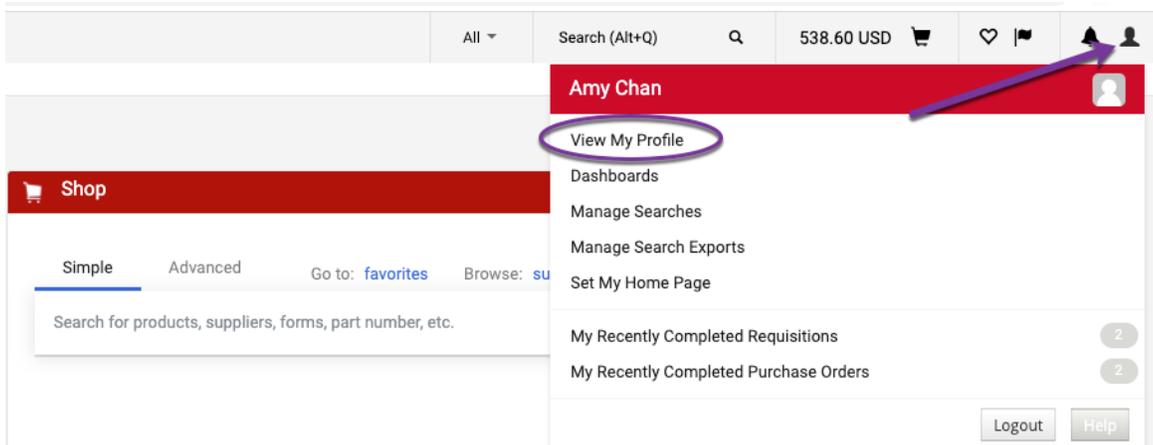
Zip Code 95192-0041

Country United States

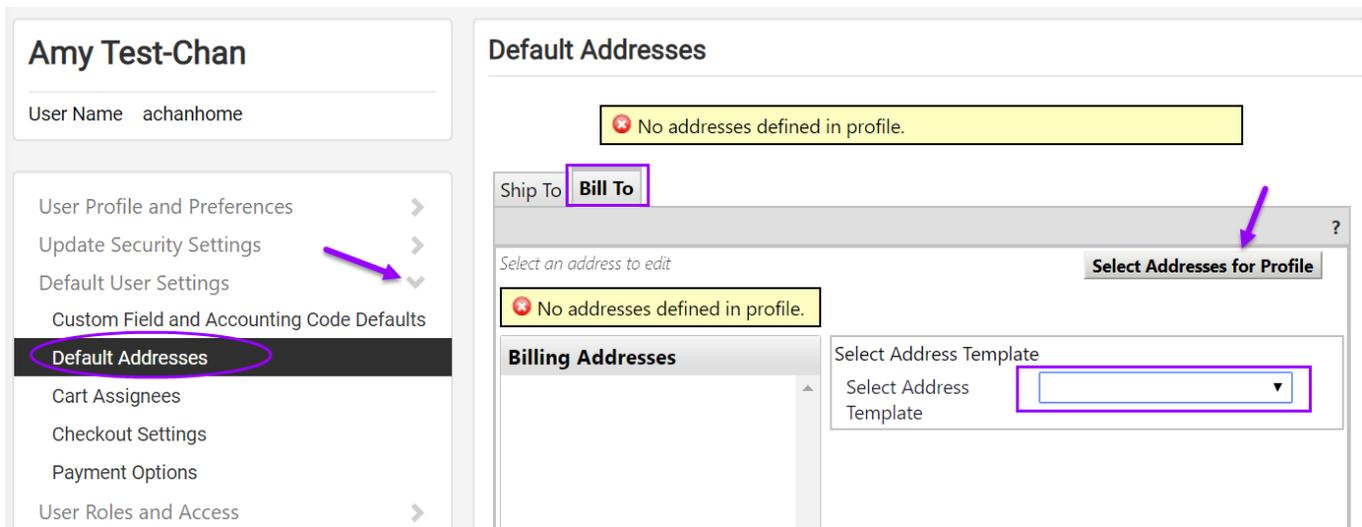
Save

### 3: Add Bill To

1. Click on **Profile** icon.
2. Go to **View My Profile**.



3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Default Addresses**.
5. Click the **Bill To** tab.
6. Click **Select Addresses for Profile**.
7. The **Select Address Template** section displays. Select the appropriate SJSU location for your department from the dropdown menu in field. **SJSU Distribution Services** represents the location for the main SJSU campus.



8. Check box for **Default** to make location your default.
9. Click **Save**.

Ship To
**Bill To**
?

Select an address to edit

⊕ No addresses defined in profile.

**Billing Addresses**

**Edit Selected Address**

Nickname	<input type="text" value="SJSU Distribution Services"/>
Default	<input checked="" type="checkbox"/>
Current Default Address	---

**ADDRESS**

Contact Line 1	Accounts Payable
Address Line 1	129 South 10th Street
City	San Jose
State	CA
Zip Code	95192-0041
Country	United States

# CSUBUY

The Shopper/Requester can log into the CSUBUY marketplace and shop for contract pricing from CSU suppliers' catalogs. The Shopper/Requester can shop from multiple catalogs at the same time. In the supplier catalogs, the Shopper/Requester can search and select products to add to their cart. The order submission to the supplier is completed in CSUBUY by the Requester.

## 1: Select Supplier Punch-Out Catalog

1. From the CSUBUY homepage, the suppliers' punch-out catalogs can be found in the **Showcase** section.
2. Click on a tile for the desired supplier.

The screenshot displays the CSUBUY Shopping Home Page. At the top, there is a navigation bar with 'Organization Message' and 'Shop' sections. Below this is an 'Online Searchable Help' section with a search bar. The main content area is titled 'Showcases' and is highlighted with a purple box. Underneath, there are two categories: 'GENERAL' and 'INFORMATION TECHNOLOGY'. The 'GENERAL' category contains four tiles: 'amazon', 'Complete Book', 'School Specialty', and 'STAPLES'. A purple arrow points to the 'STAPLES' tile. The 'INFORMATION TECHNOLOGY' category contains six tiles: 'B&H', 'CDWG', 'Connection', 'DELL', 'Graybar', and 'hp invent'.

## 2: Shop from Supplier's Punch-Out Catalog

3. After selecting desired supplier's punch-out catalog, search for products to add to your cart.

In the supplier's punch-out catalog, users can utilize their search features to locate products. Each catalog allows you to search by name, description, brand/model, and by categories. Products can also be added to your favorites list within the supplier catalog for selection in future orders.

The screenshot shows the CSUBUY supplier punch-out catalog interface. At the top, there is a dark blue navigation bar with a shopping cart icon labeled 'SHOP', the account number '1826707LA', and links for 'Messages', 'Help', and 'My Account'. Below this is a white header with the Staples logo on the left and the CSUBUY logo in the center. On the right of the header, there is a shopping cart icon showing '\$0.00' and a 'Review Cart (0)' button. A search bar is located below the header, with a magnifying glass icon and a blue arrow pointing to it. To the right of the search bar are navigation links: 'RECENTLY PURCHASED', 'BROWSE CATEGORIES' (with a blue arrow pointing to it), 'QUICK ORDER', 'YOUR LISTS', and 'YOUR DASHBOARD'. Below the header is a promotional banner for 'Now booking into 2020' with a 'Shop now' button. The main content area is titled 'RECOMMENDED FOR YOU' and displays a grid of six product cards. Each card includes a product image, a star rating, a product name, a price, and an 'Add to Cart' button. The products shown are: Tru Red Printer Paper, Sharpie Permanent Markers, Staples Invisible Tape, Kleenex Boutique Standard Facial Tissues, Staples Notepads, and BIC Round Stic Ballpoint Pens.

**Tip:** To exit the catalog and return to CSUBUY homepage, click **Cancel Punchout**.

This screenshot shows a close-up of the top navigation area of the CSUBUY supplier punch-out catalog. A purple arrow points to a button labeled 'Cancel PunchOut' located in the top right corner of the page. Below this button is a dark blue navigation bar with the account number '1826707LA', links for 'Messages', 'Help', and 'My Account'. To the right of this bar is a shopping cart icon showing '\$0.00' and a 'Review Cart (0)' button. Below the navigation bar are links for 'BROWSE CATEGORIES', 'QUICK ORDER', 'YOUR LISTS', and 'YOUR DASHBOARD'.

4. Enter the quantity for selected product and click **Add to Cart** icon.



SEARCH



RECENTLY  
PURCHASED

BROWSE  
CATEGORIES

QUICK  
ORDER

Home / Office Supplies / Writing Supplies & Instruments / Writing Supplies / Pens

## BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

Staples Item # 442901 | MFR Item #GSM609BLK | Customer Item #442901

Brand Name/Manufacturer: BIC

★★★★★ (662) | [Write a Review](#)

\$4.94 PK/60



ON CONTRACT

Delivery

Check FREE Delivery Date

1

Add



Item has been added to your **Cart**.

5. Repeat [steps 3 and 4](#) for the next product, if needed.

SHOP Account Number: 1826707LA Messages Help My Account

Staples CSUBUY The California State University

SEARCH RECENTLY PURCHASED BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

Home / Office Supplies / Writing Supplies & Instruments / Writing Supplies / Pens

BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

Staples Item # 442901 | MFR Item #GSM609BLK | Customer Item #442901  
Brand Name/Manufacturer: BIC  
★★★★★ (662) | Write a Review

\$4.94 PK/60 Add to List

ON CONTRACT

Delivery Check FREE Delivery Date 15 Add

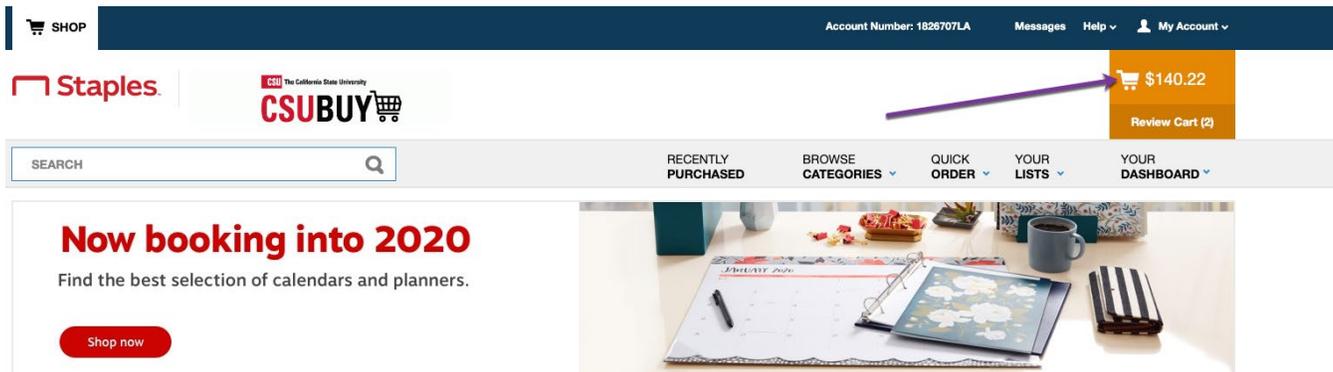
CUSTOMERS ALSO VIEWED

On Contract

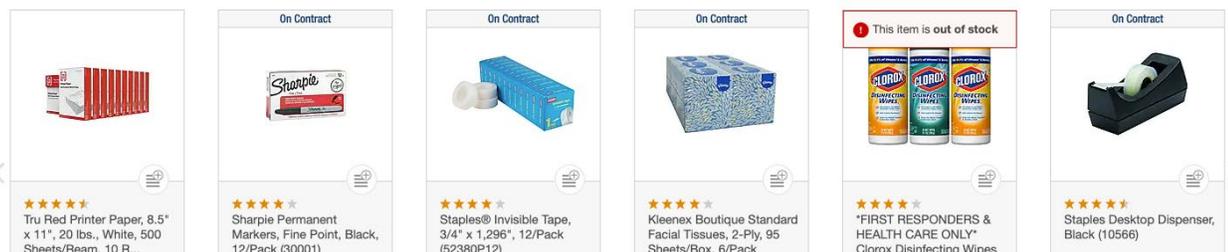
BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack \$5.51 PK/60 Add to Cart

### 3: Checkout of Supplier's Punch-Out Catalog

6. To checkout of the supplier's catalog, click on the **Cart**.



#### RECOMMENDED FOR YOU



7. Review items in the **Cart** to:

- Reduce/increase quantity. Make sure to click **Update Cart** if quantity was updated.
- Remove an item.
- **Clear Cart** to all items in Cart.

8. When ready, click **Submit Order** to send cart to CSUBuy.

Staples  [RECENTLY PURCHASED](#) [BROWSE CATEGORIES](#) [QUICK ORDER](#) [YOUR LISTS](#) [YOUR DASHBOARD](#) [\\$140.22](#)

My Cart [Print as PDF](#)

Items for Delivery

	BIC Round Stic Xtra Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack (GSM609BE) Staples Item # 031307 MFR Item # GSM609BE Customer Item # 031307	\$5.51 PK/60	<input type="text" value="12"/>	<b>\$66.12</b>
<a href="#">Remove</a>				
<a href="#">ON CONTRACT</a>				

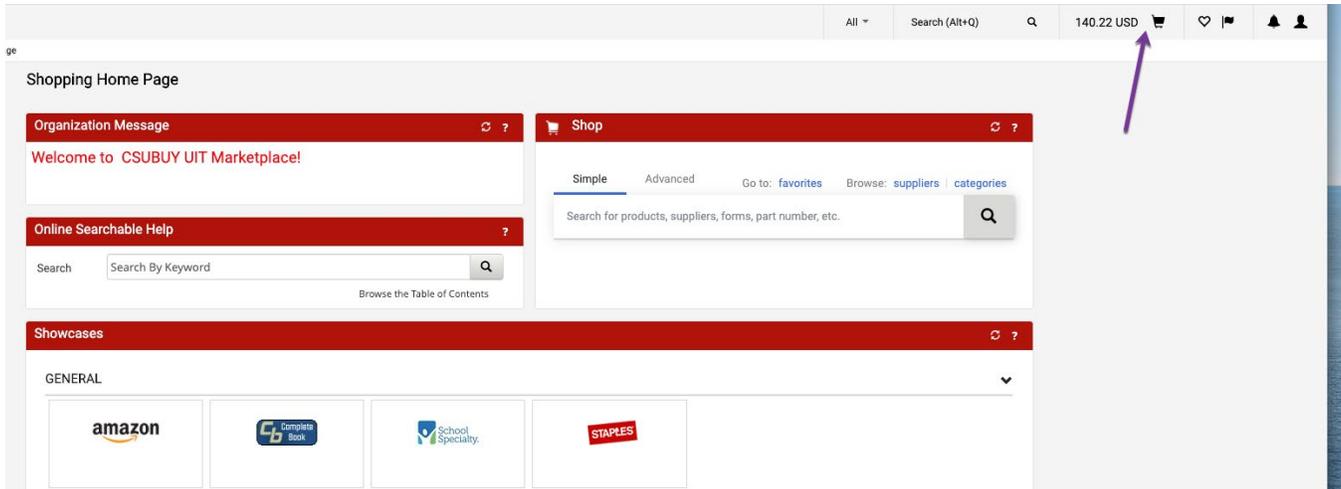
	BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK) Staples Item # 442901 MFR Item # GSM609BLK Customer Item # 442901	\$4.94 PK/60	<input type="text" value="15"/>	<b>\$74.10</b>
<a href="#">Remove</a>				
<a href="#">ON CONTRACT</a>				

[Clear Cart](#) [Update Cart](#)

Subtotal	\$140.22
<b>TOTAL</b>	<b>\$140.22</b>
<a href="#">SUBMIT ORDER</a>	

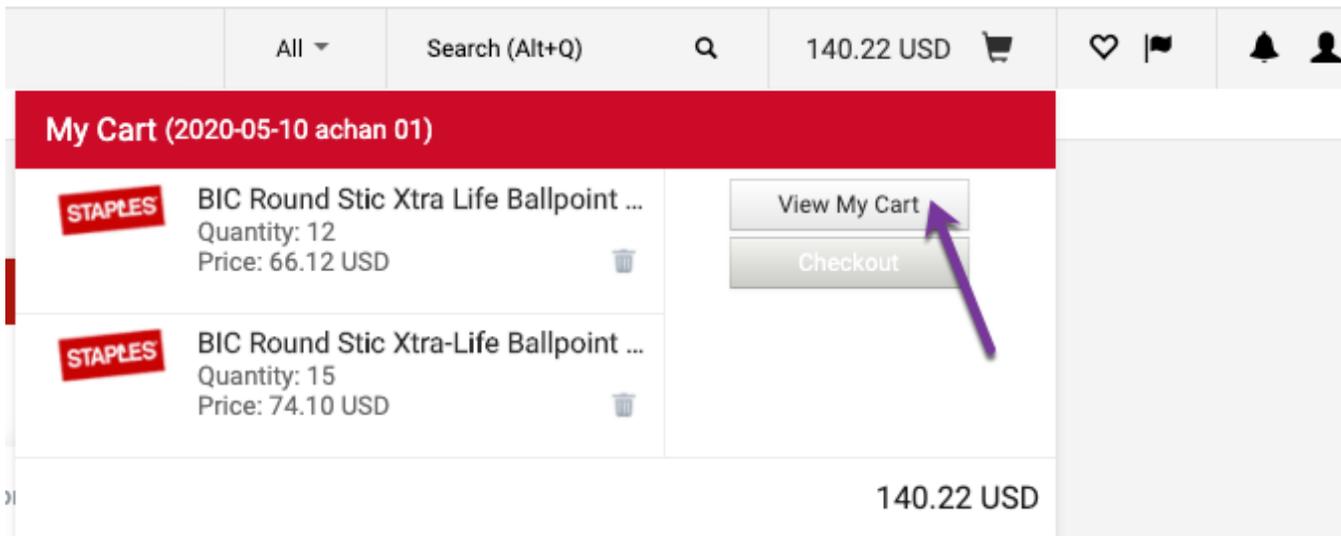
## 4: Prepare and Submit Order in CSUBuy

9. After you click Submit Order in the supplier's catalog, you will be returned to CSUBuy.
10. Click the **Cart** icon in CSUBuy.



**My Cart** panel displays.

11. Click **View My Cart**.



12. Review items to determine if quantity needs to be increased/decreased.

Shopping Cart ▾ 2020-05-16 achanhome 0'

Search for products, suppliers, forms, part number, etc.

27 Items ACTIONS FOR 0 SELECTED ITEMS ▾

**Staples Advantage ▾** 27 Items 140.22 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/18/2020 5:47:00 PM

- BIC Round Stic Xtra Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack (GSM609BE)
- BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

1	 BIC Round Stic Xtra Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack...	031307	5.51	<input type="text" value="12"/> PK	66.12	<input type="checkbox"/>
Contract  Staples-1 Staples - \$50 Minimum						
-----						
2	 BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609...	442901	4.94	<input type="text" value="15"/> PK	74.10	<input type="checkbox"/>
Contract  Staples-1 Staples - \$50 Minimum						

13. Or to remove item(s) from cart, check the box for product.

Shopping Cart ▾ 2020-05-16 achanhome 0'

Search for products, suppliers, forms, part number, etc.

27 Items ACTIONS FOR 0 SELECTED ITEMS ▾

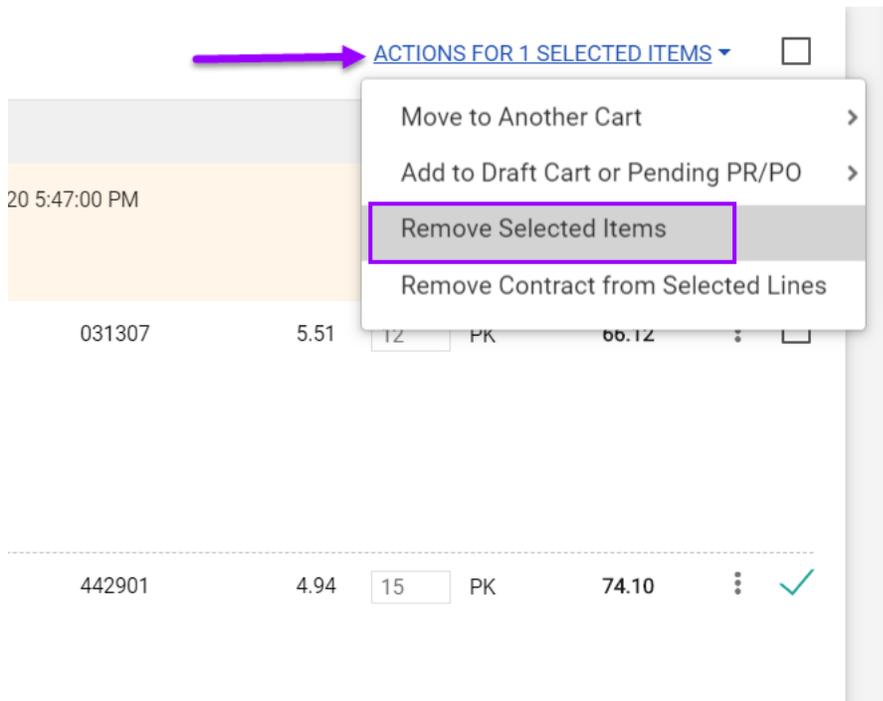
**Staples Advantage ▾** 27 Items 140.22 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/18/2020 5:47:00 PM

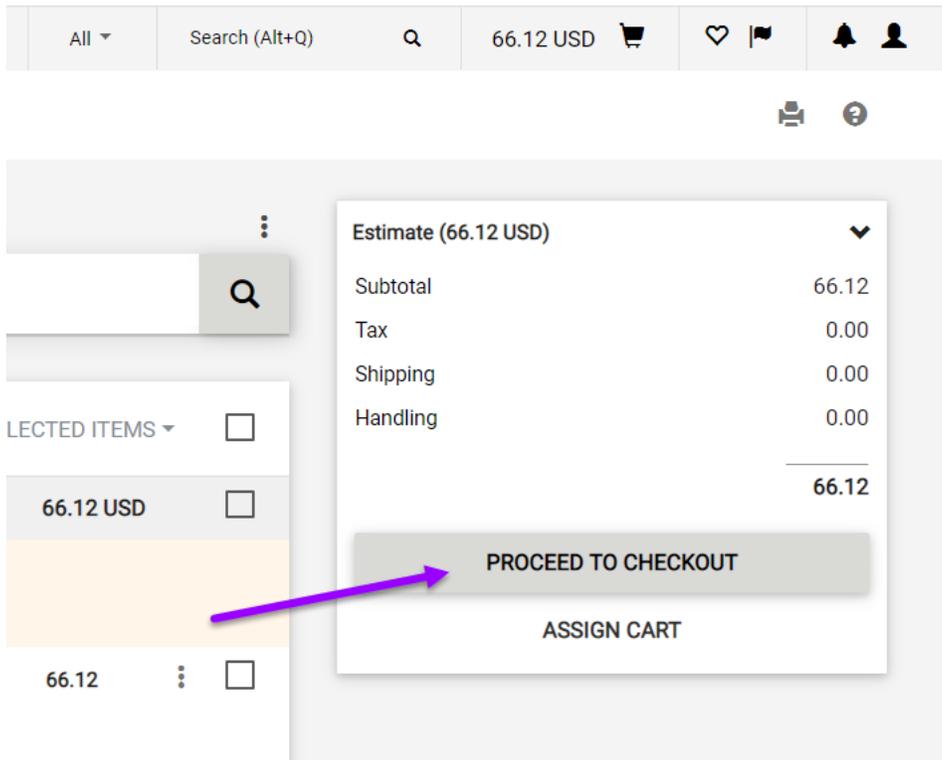
- BIC Round Stic Xtra Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack (GSM609BE)
- BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

1	 BIC Round Stic Xtra Life Ballpoint Pens, Medium Point, Blue Ink, 60/Pack...	031307	5.51	<input type="text" value="12"/> PK	66.12	<input type="checkbox"/>
Contract  Staples-1 Staples - \$50 Minimum						
-----						
2	 BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609...	442901	4.94	<input type="text" value="15"/> PK	74.10	<input type="checkbox"/>
Contract  Staples-1 Staples - \$50 Minimum						

14. After checking the box, go to **Actions For Selected Items** dropdown menu and select **Remove Selected Items**. Item(s) will be deleted from cart.



15. When ready, select **Proceed to Checkout** to continue.



## a: Select a Shipping Address

Skip this section if your default Ship To location displays. If you need to change the building/room or to select a campus location, then continue with the steps below.

After Proceed to Checkout, the Requisition page displays.

Requisition ▾ : 2964136

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping	Billing
Cart Name 2020-05-16 achanhome 01	Ship To	Bill To
Description <i>no value</i>		
Prepared by Amy Test-Chan		
	Delivery Options	Credit Card Info
	Requested Delivery Date <i>no value</i>	Cardholder Name
		Card Number
		Card Security Code
		Expiration Date ..----

**Draft**

Total (66.12 USD) ▾

Subtotal	66.12
Tax	0.00
Shipping	0.00
Handling	0.00
	<b>66.12</b>

**ASSIGN CART**

What's next for my order? ▾

Next Step Create PO

Approvers Automatically calculated by system

17. If there is no location displayed or to update building/room, click the **Pencil** icon in the Shipping section to select campus address.

Requisition ▾ : 2964136

Summary Taxes/S&H PO Preview Comments Attachments History

General	Shipping
Cart Name 2020-05-16 achanhome 01	Ship To
Description <i>no value</i>	
Prepared by Amy Test-Chan	
	Delivery Options
	Requested Delivery Date <i>no value</i>



18. Click in **Search Additional** field, search and select a campus site. If your department is on the main campus, then select **SJSU Distribution Services** location. Personal address cannot be added.

**Edit Shipping** [X]

Ship To

No address assigned

Search additional [Q] Results Per Page 10 [v]

Delivery Options

Requested Delivery Date [mm/dd/yyyy] [Calendar Icon]

[SAVE CHANGES] [CLOSE]

- 19. Enter the full name of your building and room number. Do not abbreviate the building name.
- 20. Check box for **Add to my addresses**.
- 21. In the **Nickname** field, assign a name for this address.
- 22. Optional. Check box for **Make default**.
- 23. Click **Save Changes**.

**Edit Shipping** [X]

Ship To

No address assigned

SJSU Distribution Services [Refresh Icon]

Attn:	*	Amy Test-Chan
Bldg/Rm:	*	CLARK HALL 500
Address Line 1		129 South 10th Street
City		San Jose
State		CA
Zip Code		95192-0041
Country		United States

Add to my addresses

Nickname [FINANCE]

Make default

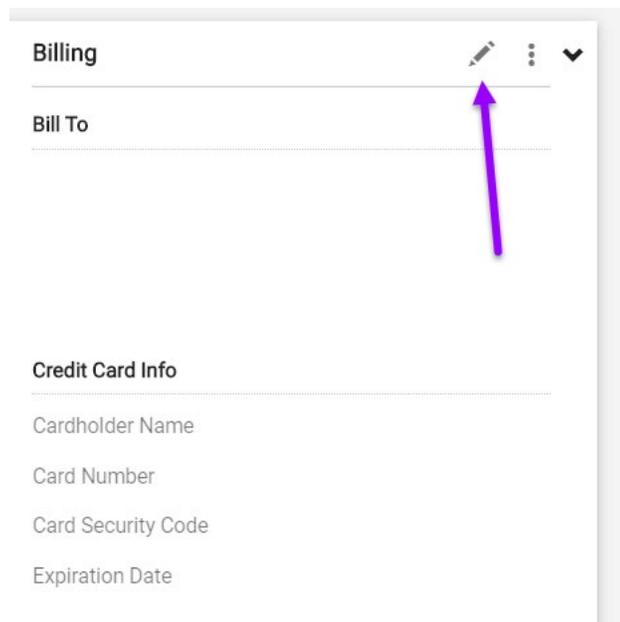
SJSU Distribution Services [Q] Results Per Page 10 [v] < 1 of 1 >

[SAVE CHANGES] [CLOSE]

## b: Select Billing Address

Skip this section if your default Bill To location displays.

24. In the **Billing** section, click the **Pencil** icon to add Bill To address.



**Billing**

Bill To

**Credit Card Info**

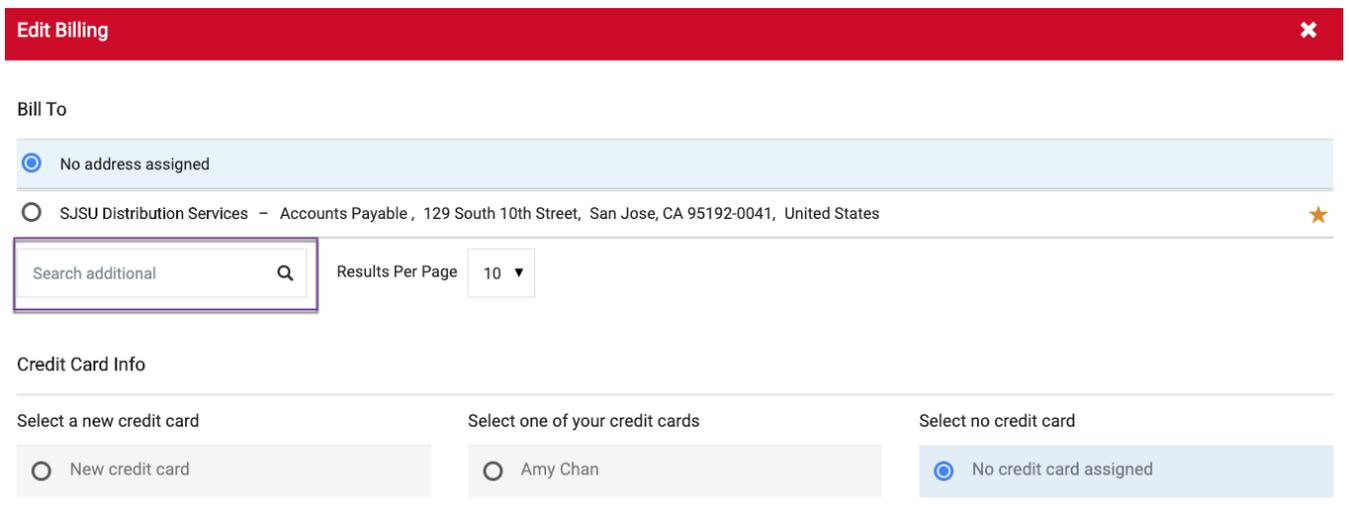
Cardholder Name

Card Number

Card Security Code

Expiration Date

25. Search and select **Bill To** location **SJSU Distribution Services**. There will only be one location displayed in dropdown menu.



**Edit Billing**

Bill To

No address assigned

SJSU Distribution Services - Accounts Payable, 129 South 10th Street, San Jose, CA 95192-0041, United States

Search additional   Results Per Page 10

**Credit Card Info**

Select a new credit card

New credit card

Select one of your credit cards

Amy Chan

Select no credit card

No credit card assigned

26. Once you've selected the location, check box for **Make default**.
27. Assign a nickname for location
28. Click **Save Changes**.

### Edit Billing ✕

Bill To

CURRENT ADDRESS ↻

Contact Line 1	Accounts Payable	<input checked="" type="checkbox"/> Add to my addresses
Address Line 1	129 South 10th Street	
City	San Jose	Nickname <input type="text" value="Main"/>
State	CA	Make default <input checked="" type="checkbox"/>
Zip Code	95192-0041	
Country	United States	

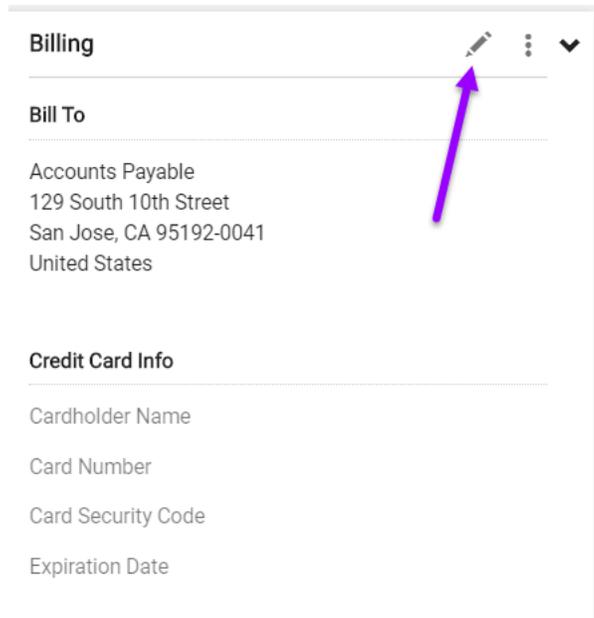
SJSU Distribution Services - Accounts Payable , 129 South 10th Street, San Jose, CA 95192-0041, United States ★

Search additional   Results Per Page

## c: Enter Credit Card Information

Skip this section if your default ProCard displays. Following the steps below to add a card or select a different saved card.

29. Add ProCard information by clicking the click **Pencil** icon in **Billing** section.



**Billing**

**Bill To**

Accounts Payable  
129 South 10th Street  
San Jose, CA 95192-0041  
United States

**Credit Card Info**

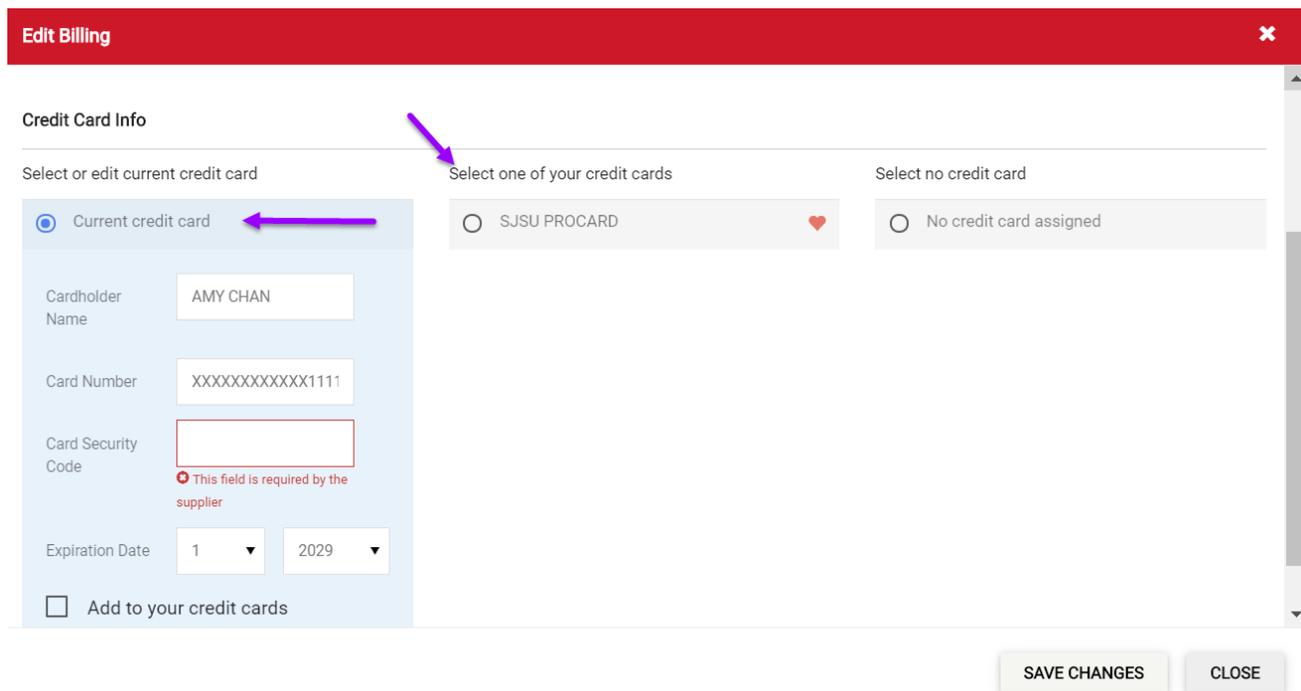
Cardholder Name

Card Number

Card Security Code

Expiration Date

30. Click the radio button for **New Credit Card** or select an existing card under the **Select one of your credit cards** section.



**Edit Billing**

**Credit Card Info**

Select or edit current credit card      Select one of your credit cards      Select no credit card

Current credit card       SJSU PROCARD       No credit card assigned

Cardholder Name: AMY CHAN

Card Number: XXXXXXXXXXXX1111

Card Security Code:  This field is required by the supplier

Expiration Date: 1 / 2029

Add to your credit cards

SAVE CHANGES      CLOSE

To add new card to the order:

31. Enter card information. Though the card will be saved in your profile, you will be prompted to enter the 3-digit Card Security Code each time.
32. In **Name this card** field, assign a name for the card.
33. Optional. Check box for **Make default**, then assign a name for the card.
34. Click **Save Changes**.

### Edit Billing

Select a new credit card

Select one of your credit cards

Select no credit card

New credit card

Cardholder Name: AMY M CHAN

Card Number: 4111111111111111

Card Security Code: 690

Expiration Date: 1 / 2020

Add to your credit cards

SJSU ProCard |  Make default

Amy Chan

No credit card assigned

**SAVE CHANGES** **CLOSE**

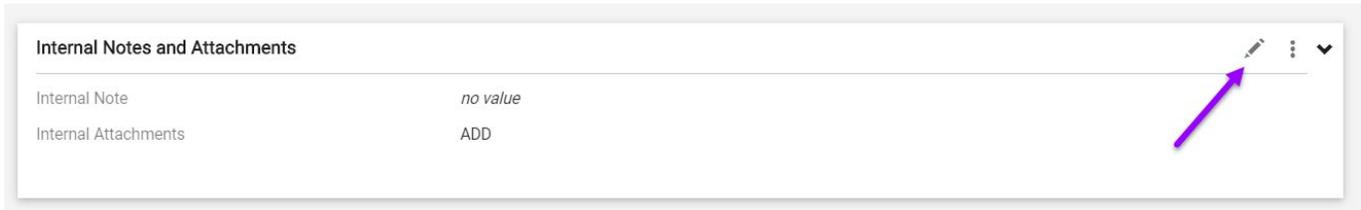
### Shipping, Billing, and Credit Card Information is completed.

General	Shipping	Billing
<b>Cart Name</b> 2020-03-25 achanhome 01	<b>Ship To</b>	<b>Bill To</b>
<b>Description</b> no value	Attn: Amy Test-Chan Bldg/Rm: CLARK HALL 500 129 South 10th Street San Jose, CA 95192-0041 United States	Accounts Payable 129 South 10th Street San Jose, CA 95192-0041 United States
<b>Prepared by</b> Amy Test-Chan	<b>Delivery Options</b>	<b>Credit Card Info</b>
	Requested Delivery Date no value	Cardholder Name AMY CHAN
		Card Number XXXXXXXXXXXX1111
		Card Security Code XXX
		Expiration Date 1/2029

## d: Internal Notes and Attachments

**Optional.** User can add notes regarding the order. The notes will display in the transaction and order summary as a reference. Notes should not be used to provide instructions to the supplier. The attachment feature is not available for use in CSUBUY.

35. Click **Pencil** icon to add notes.



**Edit Internal Notes and Attachments** display.

36. Enter comments.

37. Click **Save Changes**.

**Edit Internal Notes And Attachments** ✕

Internal Note

---

Internal Note

966 characters remaining expand | clear

**SAVE CHANGES** **CLOSE**

Comment displays.

Internal Notes and Attachments ✎ ⋮ ▾

Internal Note	Order is for Professor Jane Smith. 
Internal Attachments	ADD

## e: Update Quantity or Remove Items

38. User can still review the items to update quantity or remove it. Refer to [steps 12 to 14](#) in this section for instructions.

Internal Notes and Attachments ✎ ⋮ ▾

Internal Note	Order is for Professor Jane Smith.
Internal Attachments	ADD

15 Items ACTIONS FOR 0 SELECTED ITEMS ▾

Staples Advantage ▾ 15 Items 74.10 USD

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 5/10/2020 4:06:12 PM

- BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)

1	BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609-BLK)	442901	4.94	<input type="text" value="15"/> PK	74.10	<span>✎ ⋮ ▾ <input type="checkbox"/></span>
		Internal Note	no value			
		Internal Attachments	ADD			

## f: Place Order to Supplier

39. The Requester (ProCard holder) clicks **Place Order** to submit order to the supplier.

Billing

Bill To

Accounts Payable  
129 South 10th Street  
San Jose, CA 95192-0041  
United States

Credit Card Info

Cardholder Name Achan  
Card Number XXXXXXXXXXXX1111  
Card Security Code XXX  
Expiration Date 1/2022

ACTIONS FOR 0 SELECTED ITEMS

15 Items 74.10 USD

Draft

Total (74.10 USD)	
Subtotal	74.10
Tax	0.00
Shipping	0.00
Handling	0.00
	74.10

PLACE ORDER

ASSIGN CART

What's next for my order?

Next Step Create PO

Approvers Automatically calculated by system

Workflow

- Draft  
Active  
Amy Chan
- Create PO  
Future
- Finish  
Future

40. Message confirms that order was submitted to supplier. Emails will be delivered to the Requester from CSUBUY and the Supplier confirming the purchase.

Simple Advanced

Go to: favorites Browse: suppliers categories

Search for products, suppliers, forms, part number, etc.

Requisition 2960110 Submitted

Summary	Options
Requisition Number 2960110	Print
Requisition status Pending	Recent orders
Cart name 2020-05-10 achan 01	Return to your home page
Requisition date 5/10/2020	
Requisition total 74.10 USD	
Number of line items 1	

## g: Shopper Assigns Cart to Requester

Requesters can skip this section. The CSUBUY Shopper will assign (transfer) their cart to the designated Requester (ProCard holder) for their account. The Shopper also has the option to assign their cart to another Requester in CSUBUY.

41. Click the **Assign Cart** button.

The screenshot displays the CSUBUY interface with the following sections:

- Shipping:** Ship To (Attn: Amy Test-Chan, Bldg/Rm: CLARK HALL 500, 129 South 10th Street, San Jose, CA 95192-0041, United States) and Delivery Options (Requested Delivery Date: no value).
- Billing:** Bill To (Accounts Payable, 129 South 10th Street, San Jose, CA 95192-0041, United States) and Credit Card Info (Cardholder Name: AMY CHAN, Card Number: XXXXXXXXXXXX1111, Card Security Code: XXX, Expiration Date: 1/2029).
- Draft Order Summary:** Total (100.11 USD), Subtotal (100.11), Tax (0.00), Shipping (0.00), Handling (0.00), and a total of 100.11.
- Next Steps:** Next Step: Create PO, Approvers: Automatically calculated by system.

A red arrow points to the **ASSIGN CART** button located below the draft order summary.

**Assign Cart: User Search** panel appears.

42. Click **SELECT** to choose designated Requester for Shopper's account **or** click on **Search** to choose a different Requester. The Requester must exist in CSUBUY.

The screenshot shows the **Assign Cart: User Search** panel with the following elements:

- Assign Cart To:** A dropdown menu currently showing *no value*. The options **SELECT** and **SEARCH** are visible. A red arrow points to the **SELECT** option.
- Note To Assignee:** A text input field with a vertical cursor.
- Buttons:** **ASSIGN** and **CLOSE** buttons are located at the bottom of the panel.

43. Select designated Requester (ProCard holder) from dropdown menu.

Assign Cart: User Search Profile Values

Assign Cart To: Amy Chan

SELECT or SEARCH

Note To Assignee:

ASSIGN CLOSE

44. or if **Search** was chosen, then enter the Requester's name to search.

45. Result displays, click the + icon for the Requester to select and assign cart to.

User Search

Emely Balingit

ADD FILTER

Page 1 of 5 1-10 of 48 Results 10 Per Page

Name	User Name	Email	Phone
Emely Balingit	ebalingit	emely.balingit@csusb.edu	+1 408-924-1558

Requester's name displays.

46. Enter message to the **Requester in Note To Assignee** field. This message will display in the email to the Requester.

47. Click **ASSIGN**.

Assign Cart: User Search

Assign Cart To: Emely Balingit

SELECT or SEARCH

Add to Profile

Note To Assignee: Hello Emely,  
Please complete my Staples order. Thank you.

ASSIGN CLOSE

Cart Assigned message displays for Shopper. The Requester will receive an email to complete purchase in CSUBUY.

### ✔ Cart Assigned

Requisition Summary		Options
Requisition number	2929331	Create new draft cart
Cart name	2020-03-25 achanhome 01	Recent orders
Requisition total	100.11 USD	Return to your home page
Number of line items	6	

An email will go to the Requester notifying them that a cart has been assigned to them and to complete purchase in CSUBUY.

A shopping cart has been assigned to you 

support@sciqest.com  
to me



Re: A shopping cart has been assigned to you  
Cart Name: 2020-03-25 achanhome 01  
Cart Number: 2929331  
Prepared for: Amy Test-Chan (Campus: San Jose State University)  
Prepared by: Amy Chan

Dear Emely Baingit

A shopping cart has been assigned to you by Amy Test-Chan ([sharksac2@att.net](mailto:sharksac2@att.net)). The shopping cart can be accessed for review in "Draft Carts" or by selecting the URL below.

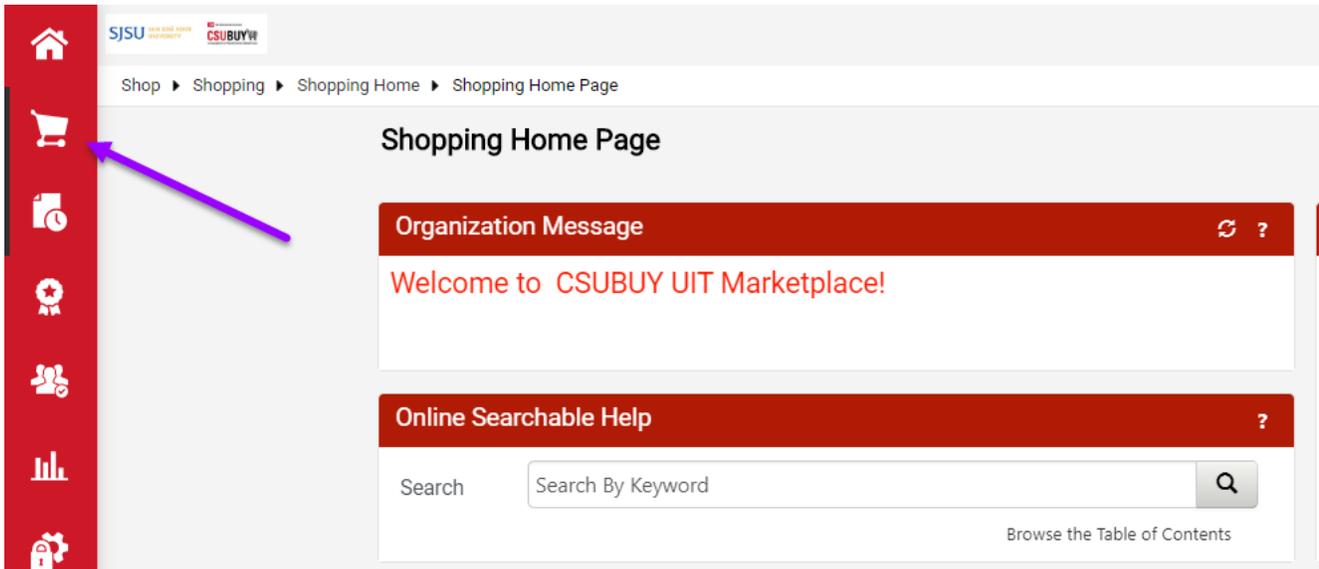
<https://usertest.sciqest.com/apps/Router/ViewAssignedCarts?AuthUser=6134269&ParamAction=View&CartId=2929331&trmstp=1589246476079>

If applicable, the user has submitted the following additional comments:

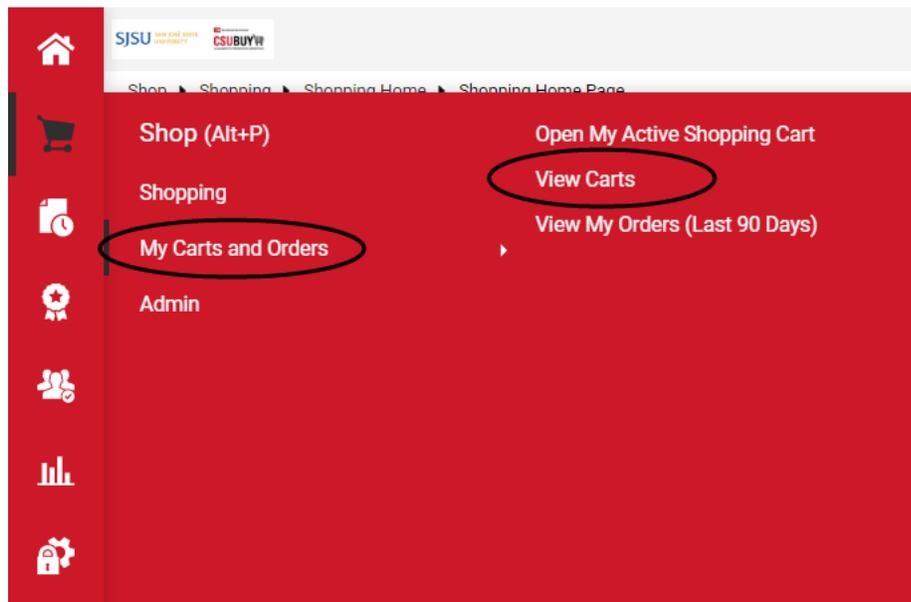
## h. Requester Processes an Assigned Cart from Shopper

Requester will receive an email informing them a Shopper has assigned a cart for them to complete.

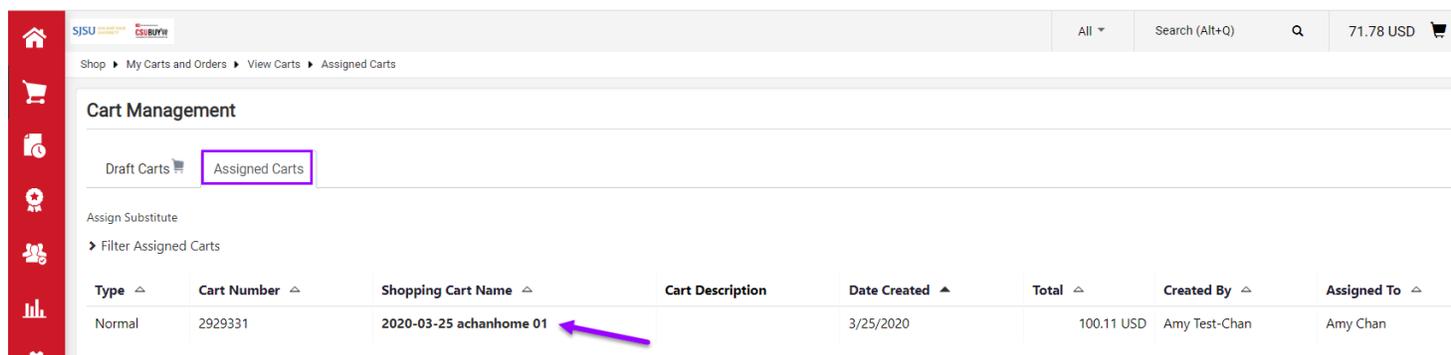
1. To locate the assigned cart, from CSUBUY homepage click the **Shopping Cart** icon.



2. Navigate to **My Carts and Orders > View Carts**.



3. Go to Assigned Carts page.
4. Click the hyperlink for order under **Shopping Cart Name** column. Follow the steps in [Prepare and Submit Order in CSUBUY](#) to complete the purchase.

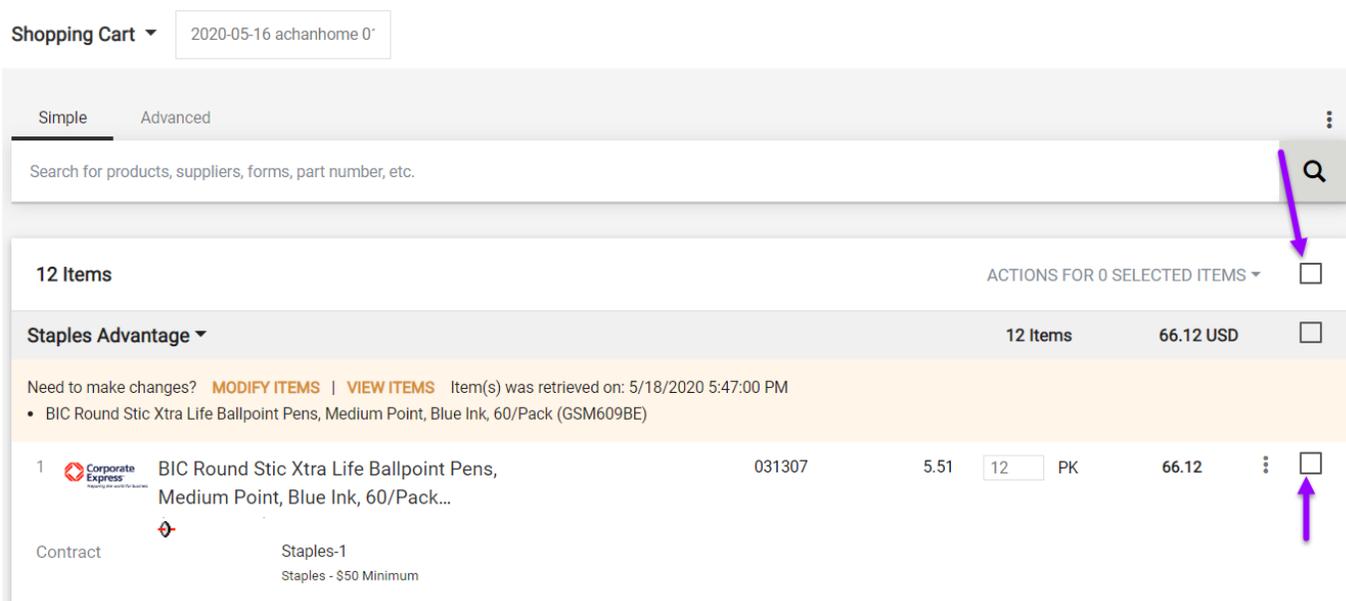


## Draft Cart

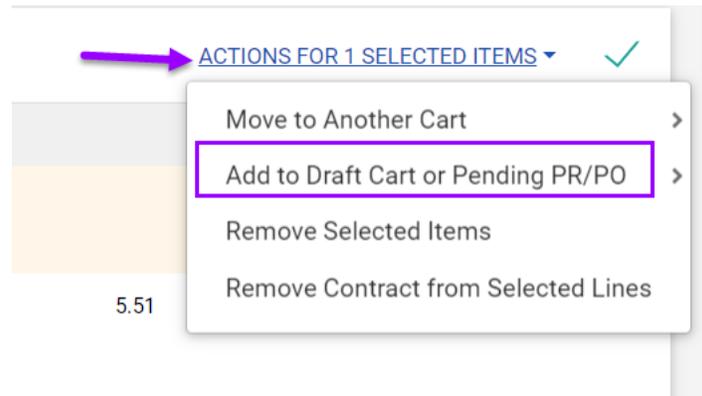
### 1: Move an Active Cart to Draft Cart

Requester/Shopper can move an “Active Cart” to “Draft Cart” if they are not ready to place the order.

1. Go to the Cart in CSUBUY.
2. Check box for item or all items to move to “Draft Cart”



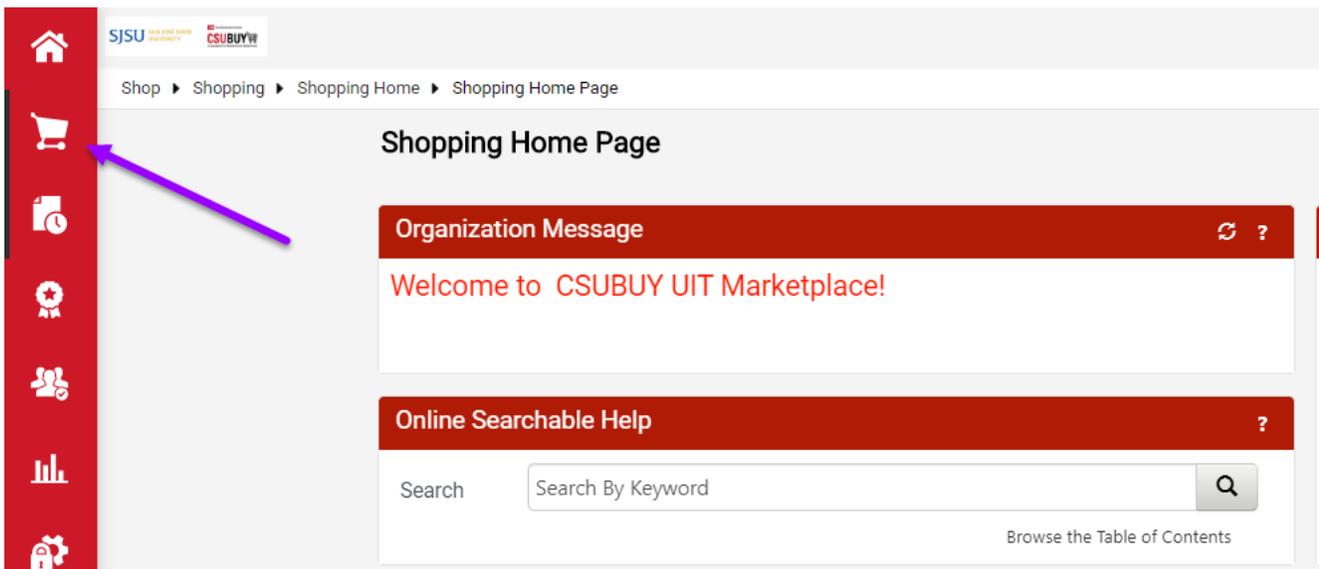
3. Go to Actions for Selected Items.
4. From dropdown menu, select **Add to Draft Cart or Pending PR/PO**.



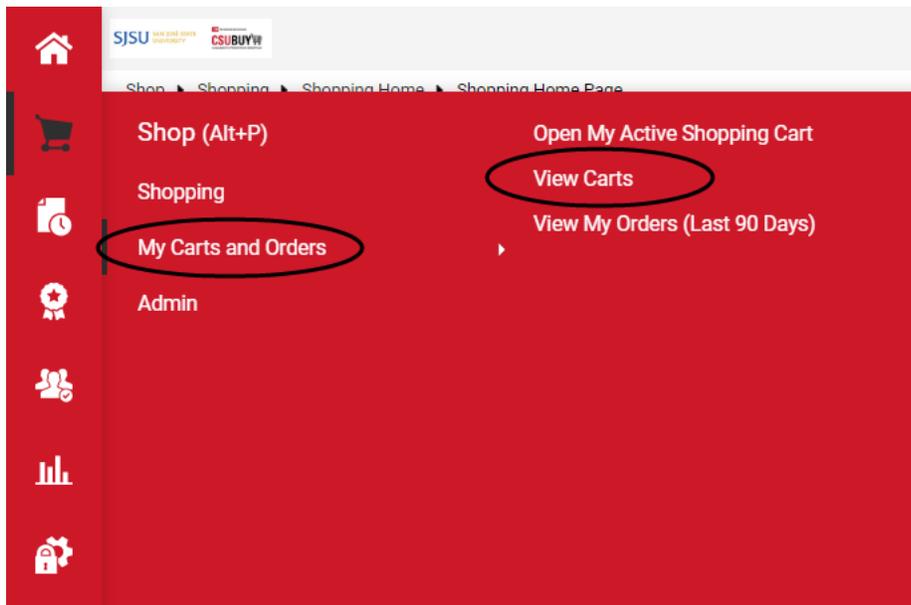
## 2: View Draft Cart

Requester/Shopper can create a cart and hold it as a Draft in CSUBUY until ready to complete the purchasing process. .

1. From CSUBUY homepage, click the Shopping Cart icon.

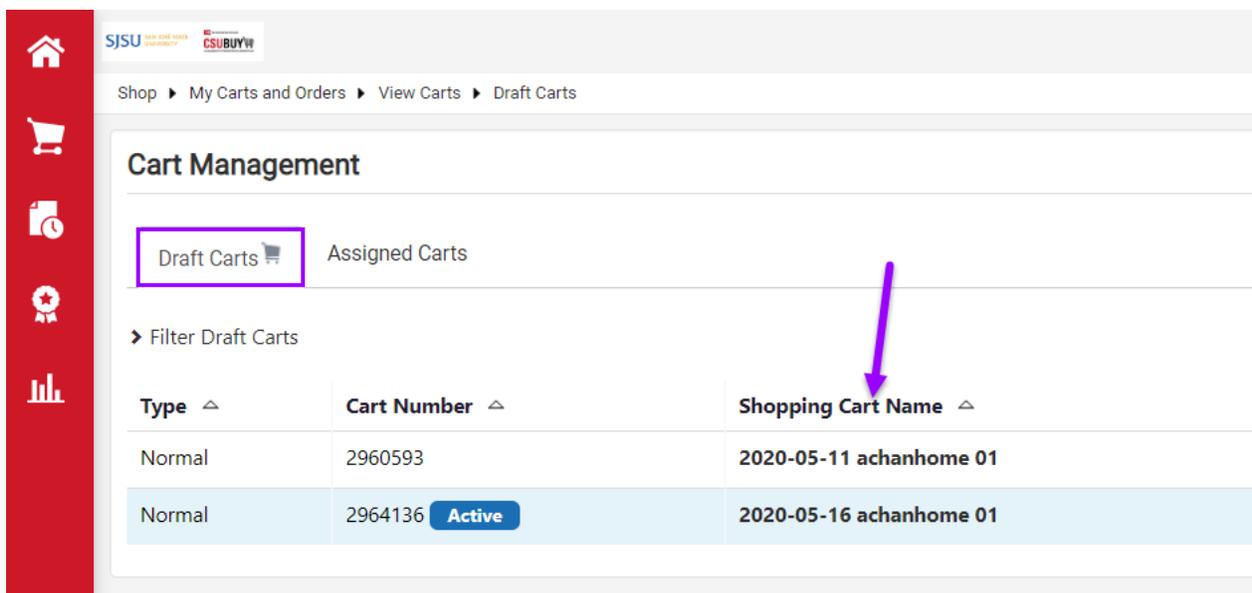


2. Navigate to **My Carts and Orders > View Carts**.



3. In **Draft Carts** page, click the hyperlink for order under Shopping Cart Name column. This will make the order “Active”.

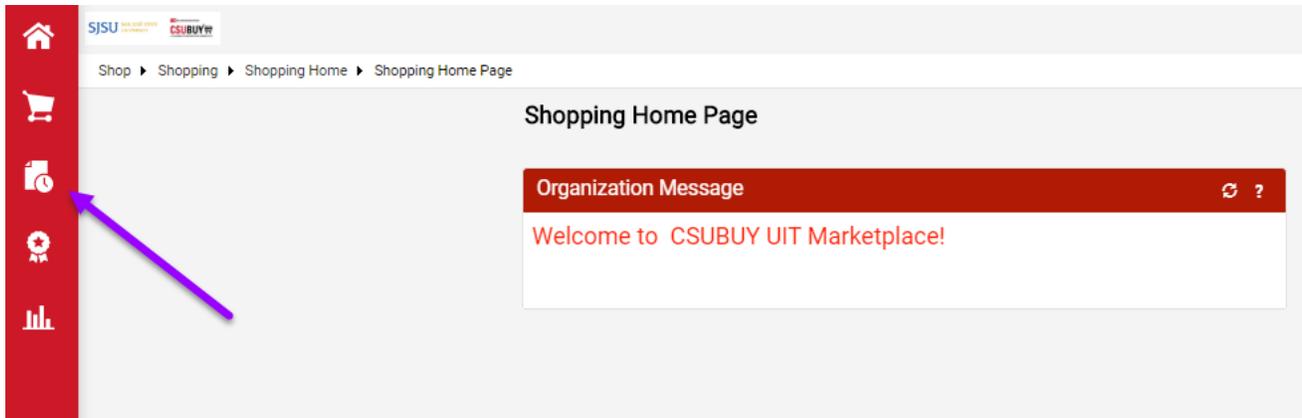
4. Follow the steps in [Prepare and Submit Order in CSUBUY](#) to complete the purchase.



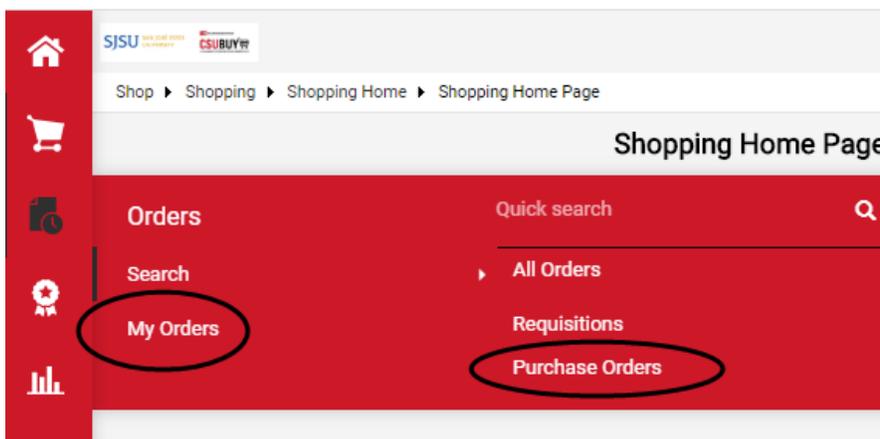
# Purchasing History

Requester/Shopper can view and print past transactions made in CSUBUY.

1. To locate the assigned cart, from CSUBUY homepage, click the Orders icon.



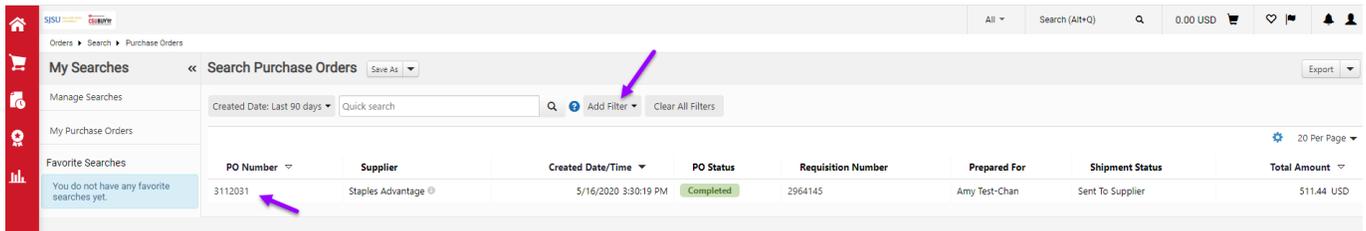
2. Navigate to **My Orders > Purchase Orders**.



3. List of past orders display.
4. Click on a hyperlink in **PO Number** column to open and view an order

or

Use **Add Filter** to filter results such as for a specific supplier and data range.



This is an example of a Purchase Order which displays items ordered and purchase total.

5. Click **Printer** icon to print the page.

