

Overview

This instruction guide is for Requestors who have the role UF_N_MKT_REQUESTOR. Shoppers may complete a requisition with this information, but must assign it to a requestor to place the order. If you are a requestor, use this instruction guide to complete a requisition in myUF Marketplace, either after completing the cart or having it assigned to you by a Shopper. Click the **Proceed to Checkout** button on the top right corner of the cart, to complete required information such as Shipping, Billing, Business Purpose, PO Business Unit, ChartFields, any attachments and a Customer number for certain suppliers.

If processing a form or non-catalog item, a Commodity Code will be needed. Internal Notes and External Notes may also be completed; external notes go to the supplier. Place the order using the **Place Order** button at the top. This button remains grayed out until the requisition is complete and ready for ordering.

Access myUF Marketplace by:

1. Navigating to <http://my.ufl.edu/> and logging in with your Gatorlink username and password.
 - a. Click **Nav bar > Main Menu > My Self Service > myUF Marketplace**

Reference: Click a Link Below to Jump to the Topic:

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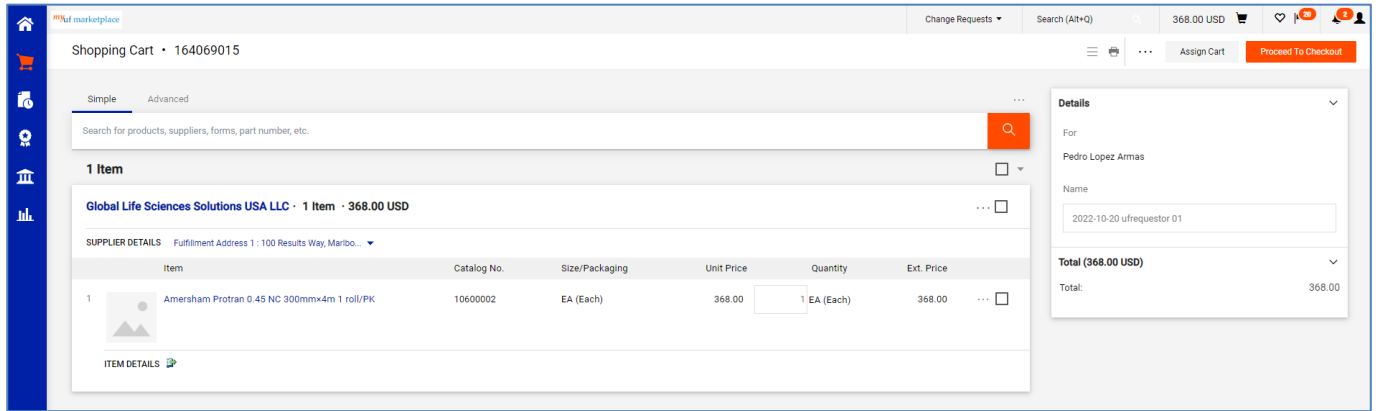
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To View your Current Cart

1. Click the Cart Icon or dollar amount in USD on the top-right to view your current cart.
2. Click the **View My Cart** button in the fly out box.

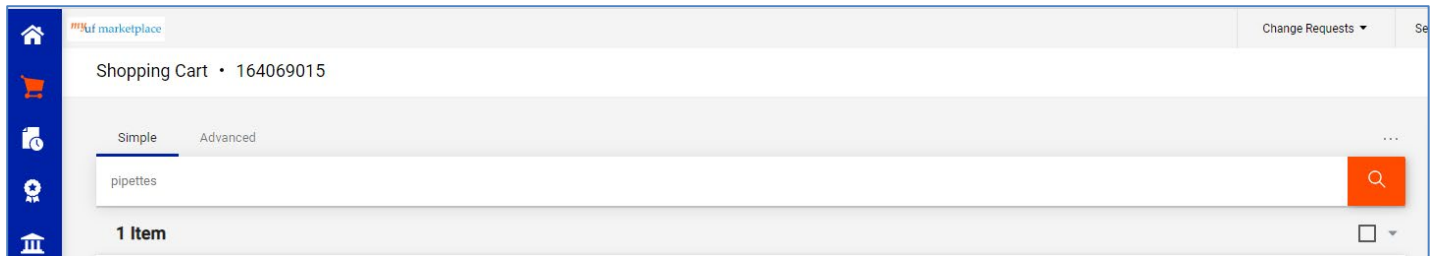
Before you shop, name the cart by clicking on the Name box on the right and giving it a meaningful name so you can find the cart again. The name will automatically save.

For any actions needed on the cart, click on the three dots ... on a pencil to edit, or on the stack of papers icon:

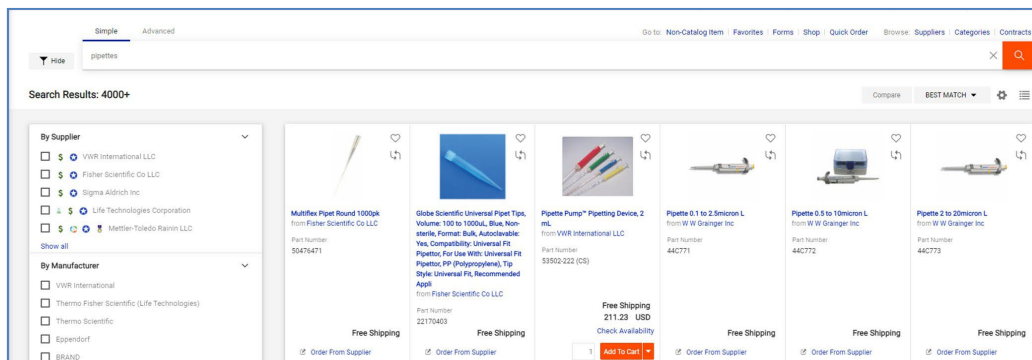


To start Shopping/Searching Within a Cart (New)

You may enter your product in the search bar within the cart and click the magnifying glass. This will search most of the punchout and catalogs in myUF Marketplace.



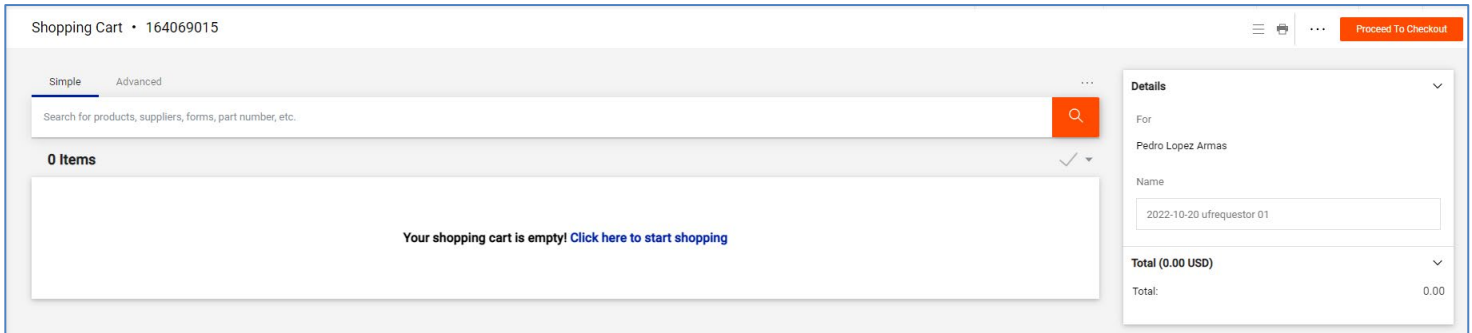
It will give you recommendations, however, **click on the magnifying glass** to get the full results:



Click on Add to Cart to add to your cart, or on Order from Supplier to view the punchout with the item.

Completing a Requisition in myUF Marketplace

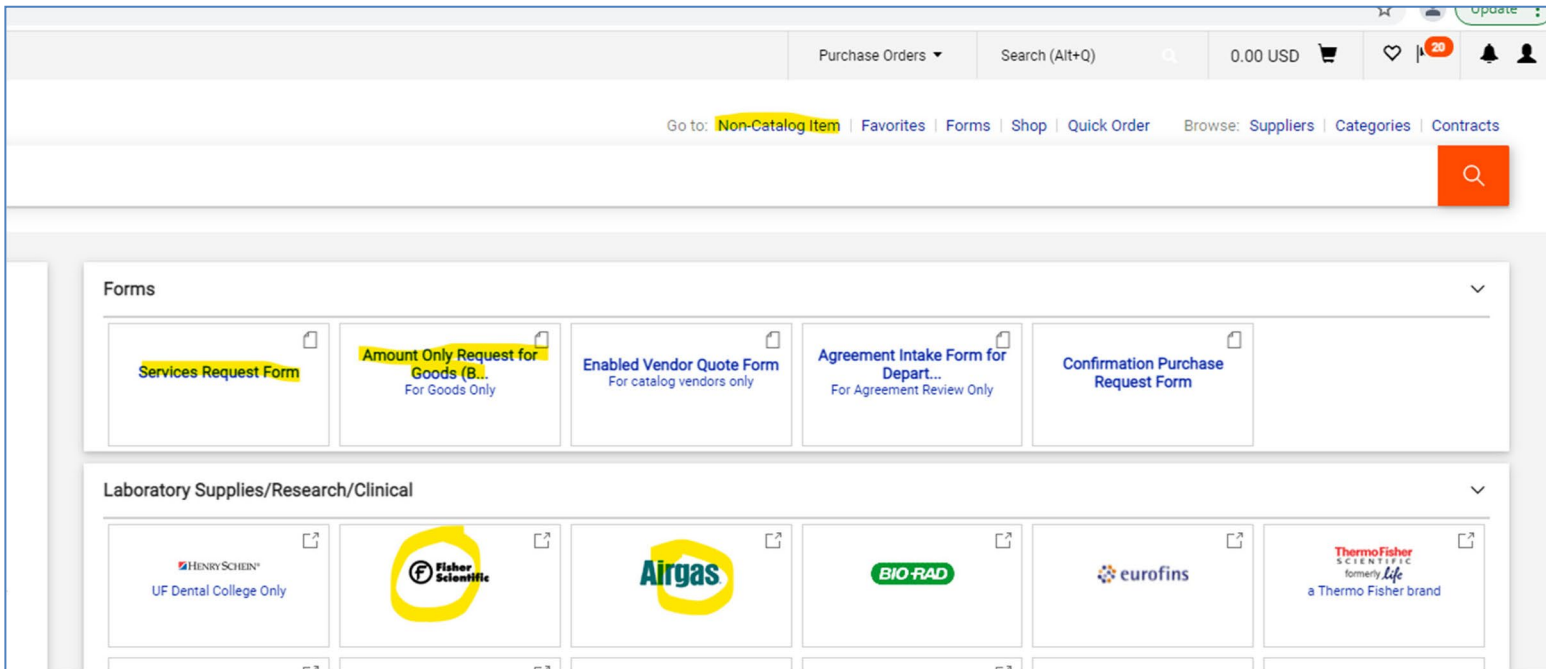
To use other shopping options, you may also click in the middle of the cart on [Click here to start shopping](#) to return to the myUF Marketplace Shopping Home Page:



To Shop While on the Home Page

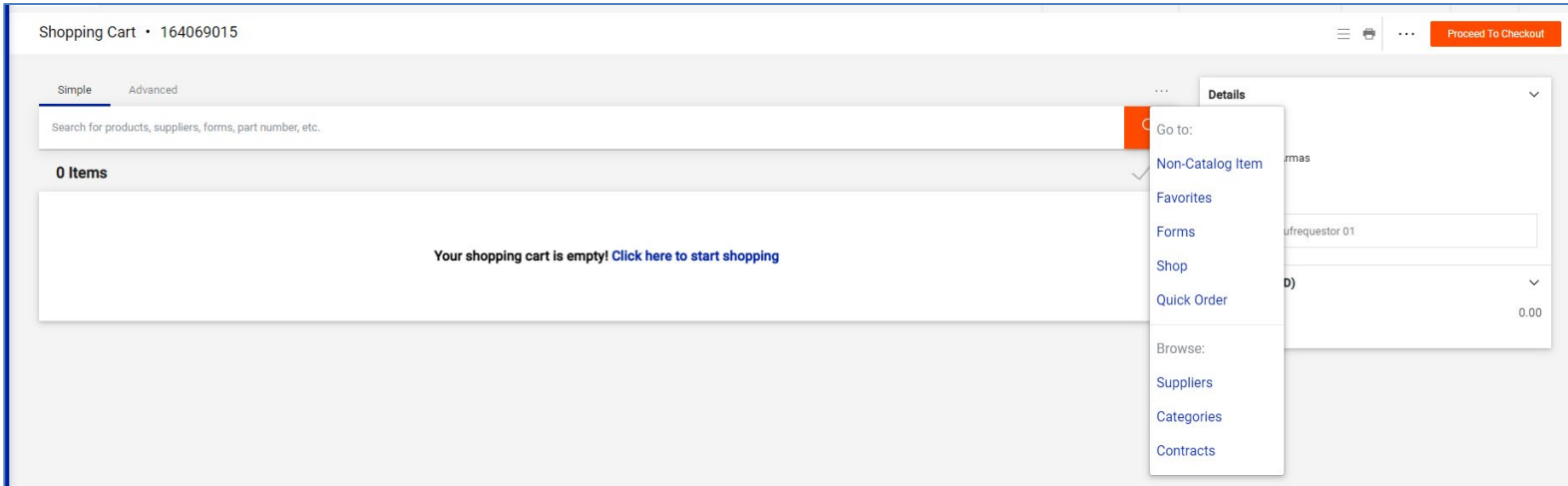
You may shop by:

- Using the **tiles** to go to the punchouts and catalogs available from suppliers such as Fisher or POSS
- Using **forms** at the top for non punchout/catalog (Enabled) vendors for Services or Amount Only.
- Clicking on the **Non Catalog Item** link way at the top to purchase items not in punchouts/catalogs



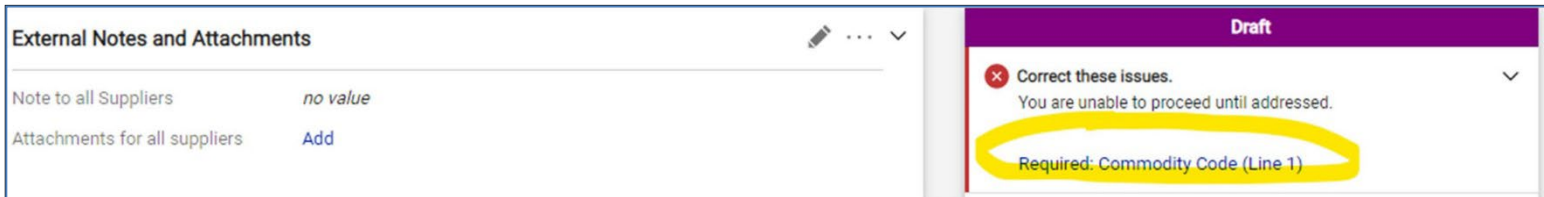
Completing a Requisition in myUF Marketplace

Shortcut: You may select one of these methods of shopping within your cart by click the three dots ... above the magnifying glass in the search bar.



To Add a Commodity Code

1. Certain forms include Commodity Code instructions in the instructions -- please read!
2. Use the instruction guide, "Searching for Commodity Codes," to help with selection.
3. You may also go to the [Procurement Website](#) to see a list of Commodity Codes and the Procurement Agents' team that works in that commodity area.



Completing a Requisition in myUF Marketplace

To use Cart Actions such as Removing a Line

Once you have added needed items to your cart, whether it is punchout/catalog items or forms, you may perform any of the following actions in your cart, for example:

- Change supplier
- Remove items

Check the checkbox of the lines affected, then click on the black arrow above:

Shopping Cart • 36543288

94.75 USD

3 Items

Airgas Inc · 3 Items · 94.75 USD

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 10/15/2021 1:43:42 PM

- Industrial Grade Nitrogen, 230 Liter Liquid Cylinder
- Industrial Grade Nitrogen, 230 Liter Liquid Cylinder

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 10/20/2021 7:34:42 AM

- Industrial Grade Oxygen, Size 200 High Pressure Steel Cylinder, CGA-540

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	NI 230LT22	CYL (Cylinder)	79.55	1 CYL (Cylinder)	79.55

ITEM DETAILS

To View All Your Carts

To view all your other carts, quickly return a cart or create a new cart, for example, click the black arrow at the top left near the new cart/requisition number:

Shopping Cart • 160476315

437.78 USD

2 Items

B&H Foto & Electronics Corp · 2 Items · 437.78 USD

SUPPLIER DETAILS

You cannot access the item(s) on the supplier's PunchOut site because it did not originate from a PunchOut session. [What does this mean?](#)

- 12TB Elements Desktop USB 3 0 External Hard Drive WEBWLG0120HB

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1	WEBWLG0120HB	EA (Each)	218.89	Qty: 2 EA (Each)	437.78

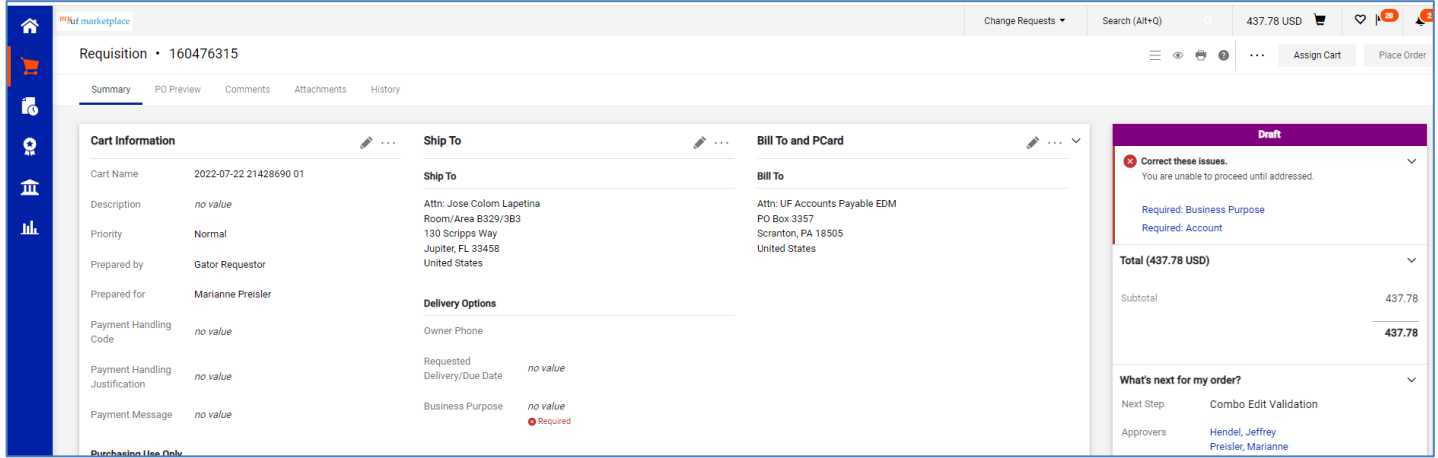
Total (437.78 USD)

Total: 437.78

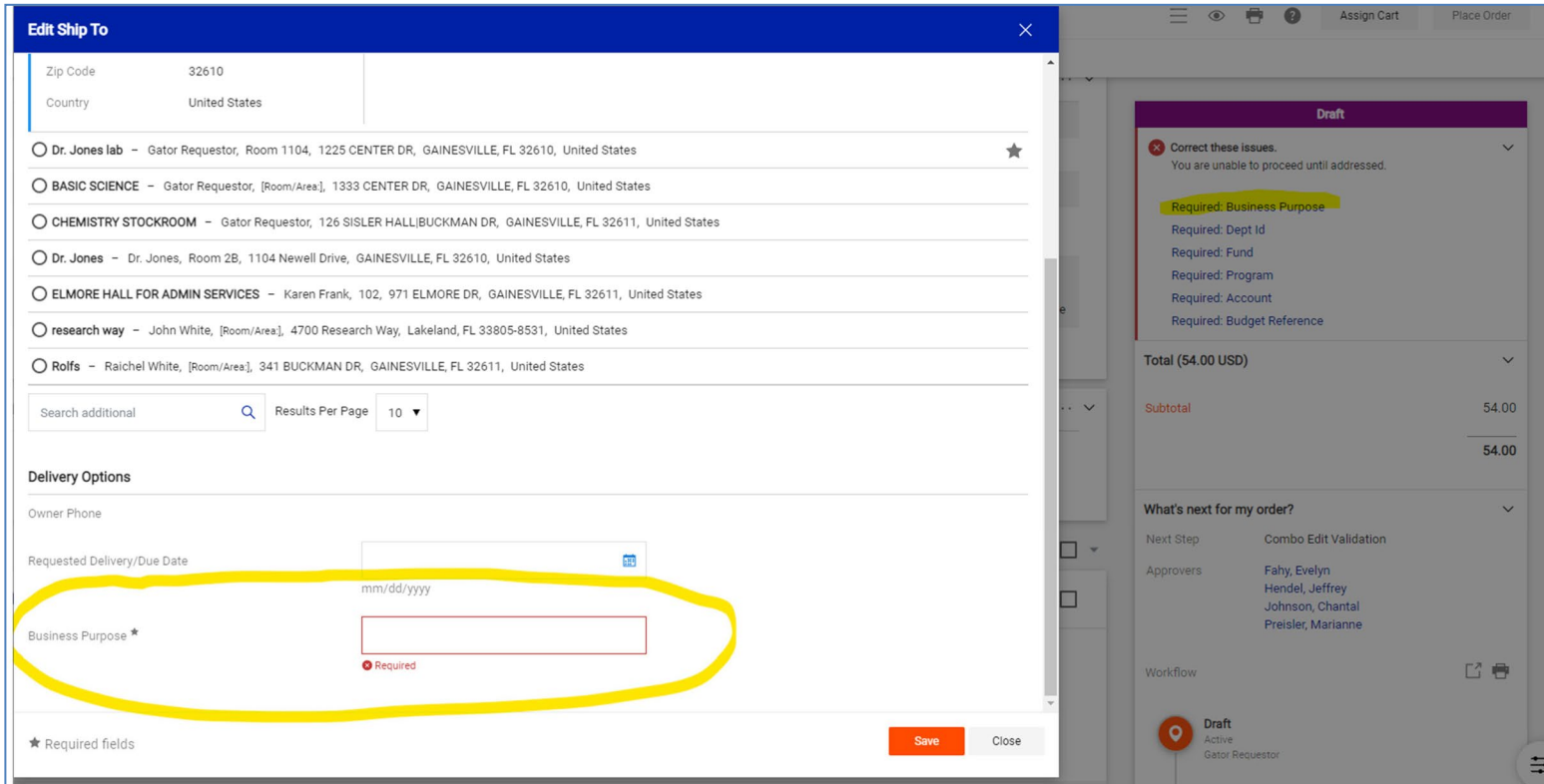
Completing a Requisition in myUF Marketplace

To View the List of Incomplete/Required Items to Complete Before Submitting

1. To process a cart as a requisition, click the **Proceed to Checkout** button at the top.
2. The system will display the requisition and the sidebar on the right that will show a list of what needs to be completed before the requisition can be submitted.



Shortcut: If you click right on the link of the item that needs to be completed, it will open it for you. For example, if you click on Required Business Purpose, the screen will display it for you. (Don't forget to scroll down.)



Entering a Ship To Address

Click the **Pencil icon** to edit the Ship To or any section:

myuf marketplace

Requisition • 160476315

Summary PO Preview Comments Attachments History

Cart Information		Ship To	
Cart Name	2022-07-22 21428690 01	Ship To	
Description	<i>no value</i>	Attn: Jose Colom Lapetina	
Priority	Normal	Room/Area B329/3B3	
Prepared by	Gator Requestor	130 Scripps Way	
Prepared for	Marianne Preisler	Jupiter, FL 33458	
Payment Handling Code	<i>no value</i>	United States	
Payment Handling Justification	<i>no value</i>	Delivery Options	
Payment Message	<i>no value</i>	Owner Phone	
		Requested Delivery/Due Date	<i>no value</i>
		Business Purpose	<i>no value</i>
			⊛ Required
Purchasing Use Only			
Payment Terms	<i>no value</i>		
PO Clauses	2 View details		

Completing a Requisition in myUF Marketplace

To select a Ship To address where your items will be delivered, scroll down within the open box and:

1. Search for your building address or the building where the items will be delivered. This address will be used by any delivery truck including Fedex, UPS, or supplier deliveries. Search by building name or part of the street address in the **Nick Name/Address Text** box. Street addresses must be official UF Facilities locations. For example, for Elmore Hall, enter “Elmore” or “971” as part of the street address 971 Elmore Drive.
2. The system will display matches; just click on one to select.

Edit Ship To

Ship To *

CURRENT ADDRESS

Attn: * Gator Requestor Add to my addresses

Room/Area: Room 1104

Address Line 1: 1225 CENTER DR

City: GAINESVILLE

State: FL

Zip Code: 32610

ELMORE HALL FOR ADMIN SERVICES – Gator Requestor, [Room/Area], 971 ELMORE DR, GAINESVILLE, FL 32611, United States

FAC MAINT ANNEX – Gator Requestor, [Room/Area], 994 ELMORE DR, GAINESVILLE, FL 32611, United States

UF New Surplus Warehouse – Gator Requestor, [Room/Area], 976 Elmore Dr, Gainesville, FL 32611, United States

Rolls – Rachel White, [Room/Area], 341 BUCKMAN DR, GAINESVILLE, FL 32611, United States

Elmore Results Per Page 10

Delivery Options

Owner Phone

Requested Delivery/Due Date

★ Required fields

Save Close

If you do not find the street address needed, please email procurement@ufl.edu.

Completing a Requisition in myUF Marketplace

Edit Ship To

Ship To ★

- Current Address - Gator Requestor, Room 1104, 1225 CENTER DR, GAINESVILLE, FL 32610, United States
- Dr. Jones lab - Gator Requestor, Room 1104, 1225 CENTER DR, GAINESVILLE, FL 32610, United States ★
- Dr. Jones - Dr. Jones, Room 2B, 1104 Newell Drive, GAINESVILLE, FL 32610, United States
- Rolfs - Raichel White, [Room/Area], 341 BUCKMAN DR, GAINESVILLE, FL 32611, United States
- ELMORE HALL FOR ADMIN SERVICES**

Attn: ★ Gator Requestor Add to my addresses

Room/Area: Room 208 Nickname ★ Theresa's Room

Address Line 1 971 ELMORE DR
City GAINESVILLE
State FL
Zip Code 32611
Country United States

Make default

ELMORE HALL FOR ADMIN SER... Results Per Page 10 1 of 1

The Ship To is now saved:

Ship To

Ship To

Attn: Gator Requestor
Room/Area: Room 208
971 ELMORE DR
GAINESVILLE, FL 32611
United States

Completing a Requisition in myUF Marketplace

Entering a Bill To Address

Click on the pencil icon or on the Correct These Issues link on the right-hand side:

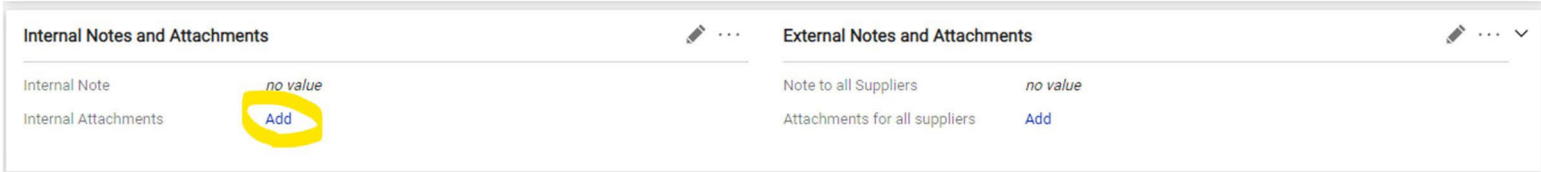
Enter the Bill To address needed; please keep in mind the university Bill To is UF Accounts Payable EDM. Please search by "Scranton" for Scranton, NJ where the university's digital mailroom is and receives invoices from suppliers.

From here you may change the Attn field, Add it to your addresses and give it a nickname. Shortcut: You may also make it your default Bill To for all future requisitions.

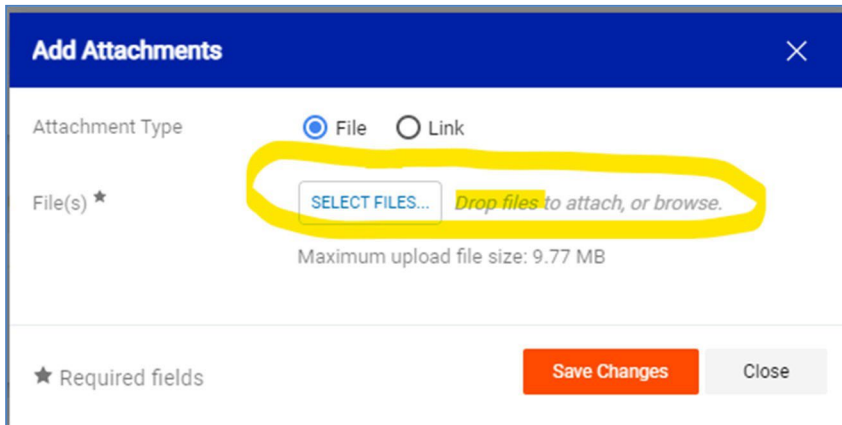
Completing a Requisition in myUF Marketplace

To Add an Internal/External Note and Attachment (such as Quotes)

When you get quotes from suppliers (Per [Procurement Directives](#), for a PO from \$10,000 and above you need three quotes unless you are using a Contract Vendor. Contract Vendors have a dollar sign by them.) Add a note by clicking on either **Pencil icon**; upload your three quotes to **Internal Notes and Attachments** by scrolling down and clicking on **Add**:

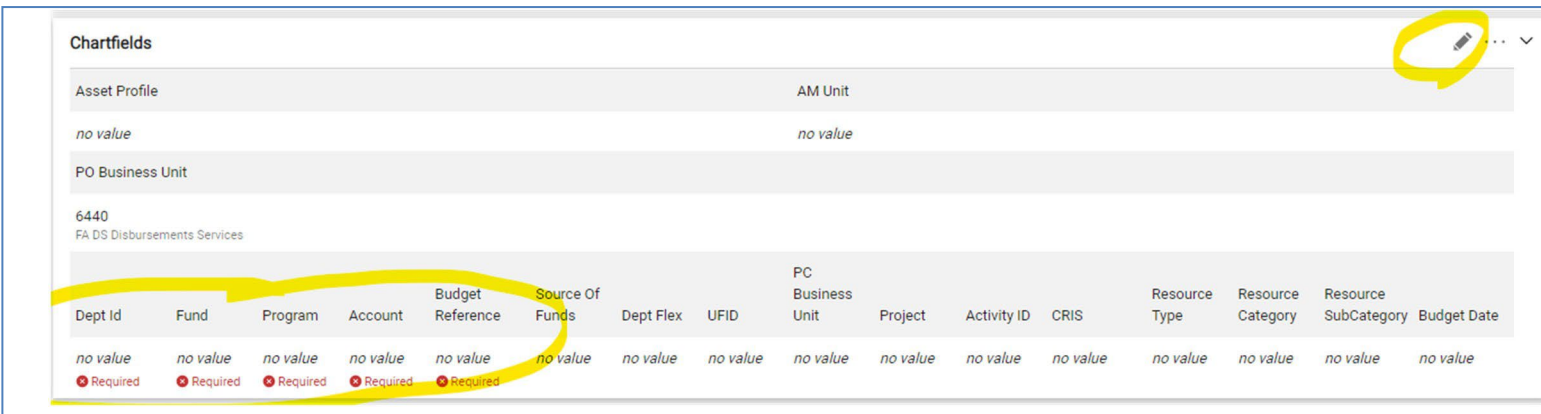


Internal Notes and Attachments do not go to the Supplier; External Notes and Attachments are on the PO to the supplier. Procurement Agents will move the attachment for the supplier to the External Attachments. You may drag an attachment from an email or your desktop and drop it into the Attachments folder:



To Add/Edit ChartFields

Click the **pencil icon** or the incomplete items in the list on the right:



Completing a Requisition in myUF Marketplace

To Add/Edit Split Distribution ChartFields

Scroll down to the line where you would like to add the splits, and click on the three dots ... on the right side of the price to open the options box. Click on Accounting Codes 1 to open the splits ChartFields:

The screenshot shows a requisition line for 'Platters for study group' with a unit price of 18.00 and a quantity of 3 EA (Each), resulting in an extended price of 54.00. An options menu is open on the right side of the price, with 'Accounting Codes 1' highlighted in yellow. The menu also includes options like 'Override', 'Supplier', 'Delivery Options', 'PCard Information', 'Asset Information', 'Remove', 'Add to Favorites', and 'Add to Draft Cart'. Below the item, there are 'ITEM DETAILS' including contract information, commodity code (90100000 / Restaurants and catering), and internal/external notes.

Scroll to the right and use the plus + sign to add a split. If you do not see a plus + sign hover your mouse around the lower right corner above the bottom scroll bar and it will appear:

The screenshot shows the 'Override Line 1: Accounting Codes 2' dialog box. It contains a table with columns for 'Activity ID', 'CRIS', 'Resource Type', 'Resource Category', 'Resource SubCategory', 'Budget Date', and 'Amount of Price'. Two rows are visible, both with '1' in the 'Activity ID' column and '09/30/2020' in the 'Budget Date' column. A plus sign icon is highlighted in green at the bottom right of the dialog box, indicating where to click to add a new split. The dialog also shows 'Line subtotal: 54.00 USD' and 'Split Total 0.00 USD'.

Completing a Requisition in myUF Marketplace

Shortcut: Some ChartFields may be completed with default values from the User Profile. Please use the instruction guide, “Setting up Your User Profile” to set up not only ChartField strings, but Ship To, Bill To and other defaults or saved options for requisitions.

To Use Saved ChartFields Strings

When you mouse over the ChartFields open string, look for options on the bottom right corner. A heart will indicate you have saved ChartFields strings in your User Profile, or Code Favorites.

Accounting Codes 1

Dept Id *	Fund *	Program *	Account *	Budget Reference *	Source Of Funds	Dept Flex	UFID	PC Business Unit
Search [v]	Search [v]	Search [v]	Search [v]	[v]	Search [q]	Search [q]	Search [q]	[v]
Required	Required	Required	Required	Required				

★ Required fields

Save Close

Click the heart to see these:

Accounting Codes 1

Dept Id *	Fund *	Program *	Account *	Budget Reference *	Source Of Funds	Dept Flex	UFID	PC Business Unit
Search [v]	Search [v]	Search [v]	Search [v]	[v]	Search [q]	Search [q]	Search [q]	[v]
Required	Required	Required	Required	Required				

★ Required fields

Save Close

mwp Project MP05317

Code Favorites

Click on the saved options to complete the ChartField string, or enter each ChartField by hand, then click save.

To Enter a Customer Number

To enter a Customer Number (Patterson Vet requires it), scroll down to Supplier Details and click **the pencil icon** on the right to open the box:

3 Items

Publix Super Markets Inc · 3 Items · 54.00 USD

^ SUPPLIER DETAILS

Contract	no value	PO Number	To Be Assigned
Customer Number	no value	Quote number	no value

...

3 Items □ ▾

Publix Super Markets Inc · 3 Items · 54.00 USD ... □

EDIT SUPPLIER DETAILS ✓ ✕

Contract	<i>no value</i>	PO Number	To Be Assigned
Customer Number	<input type="text" value="000232323"/>	Quote number	<input type="text"/>

To Preview Requisition Workflow Approval Steps

Look at the sidebar at What's Next for my Order? Then click the Approval Step link to see the approvers:

The screenshot displays a requisition in 'Draft' status. At the top, a purple bar indicates the status. Below it, a summary table shows a total of 54.00 USD. A section titled 'What's next for my order?' lists the next step as 'Combo Edit Validation' and lists three approvers: Fahy, Evelyn; Hendel, Jeffrey; and Preisler, Marianne. A workflow diagram shows the current step 'Draft' (Active, Gator Requestor) and subsequent steps: 'Combo Edit Validation' (Future), 'Financial Approval' (Future), 'Budget Validation' (Future), and 'Buyer Sourcing 4' (Future). The 'Buyer Sourcing 4' step is highlighted with a yellow circle, and its details, including the name 'Elisabeth Eubanks', email 'eeubanks@uf.edu', and phone number '+1 352-294-1165', are also circled in yellow.

Draft	
Total (54.00 USD)	▼
Subtotal	54.00
	54.00

What's next for my order? ▼

Next Step: Combo Edit Validation

Approvers: Fahy, Evelyn; Hendel, Jeffrey; Johnson, Chantal; Preisler, Marianne

Workflow: [Workflow Diagram]

Draft (Active, Gator Requestor)

Combo Edit Validation (Future)

Financial Approval (Future)

Budget Validation (Future)

Buyer Sourcing 4 (Future)

Meeting Event and Food

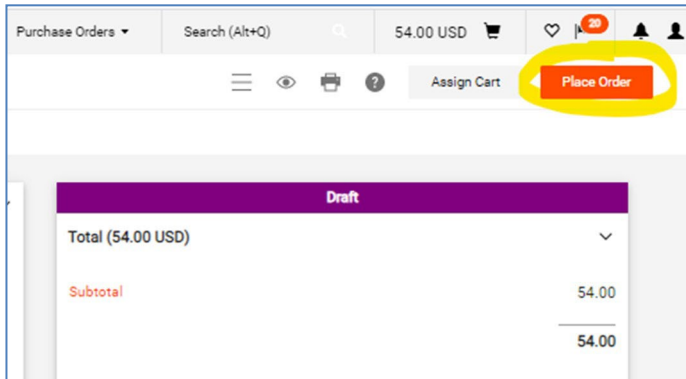
Elisabeth Eubanks
eeubanks@uf.edu
+1 352-294-1165

Final Review:

Placing the Order:

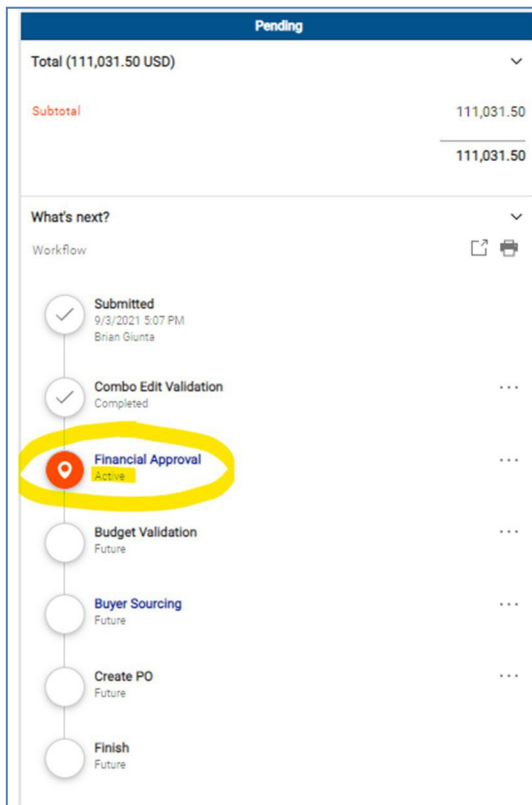
To Submit the Order

Click the **Place Order** button to place the order:



To Find the Status of Your Requisition

The system will show as **Pending**, with a red dot near the Approver Step and the word Active:



Once it gets to Finish, it will be a purchase order.

To Find the Status of Your Purchase Order

In the PO, view the sidebar as well for workflow and associated requisitions, change orders, and invoices.

Completing a Requisition in myUF Marketplace

Pending

Details >

Total (41,000.00 USD) >

Related Documents v

- Requisitions: 145888980
- Change Requests: 148292507
- Change Requests: 148045067
- Invoices: V0589618
- Invoices: V0602062
- Invoices: V0615961
- Invoices: V0629906
- Invoices: V0627851

What's next? v

Workflow Status ● Pending

Workflow

Submitted
7/2/2021 11:03 AM
Brittany Powell

Flag for Declining Balance
Completed

Asset Management Approval
Active
Deborah Strickland

Revise PO
Future

PO Dispatch
Future

PO Export
Future

Finish
9/2/2021 3:07 PM