Instruction Guide – New Experience

Completing a Requisition in myUF Marketplace

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 Navbar > Main Menu > My Self Service > myUF Marketplace

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

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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.
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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:

![Shopping Cart](Image)

**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
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!
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.
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:

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:
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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:
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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.

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

![Image of ChartFields](image)

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:

![Image of Plus Sign](image)
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.

Click the heart to see these:

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:
To view the approval steps, once all items are completed in the requisition, after no more items on the list on the right, click on What's Next for my Order? On the right sidebar:

- **Customer Number**: 000233233
- **PO Number**: Quote number
- **To Be Assigned**:
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:
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.
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<table>
<thead>
<tr>
<th>Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total (41,000.00 USD)</td>
<td></td>
</tr>
</tbody>
</table>

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

**What's next?**

- **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