

Shopping Using a Form for Service

Overview

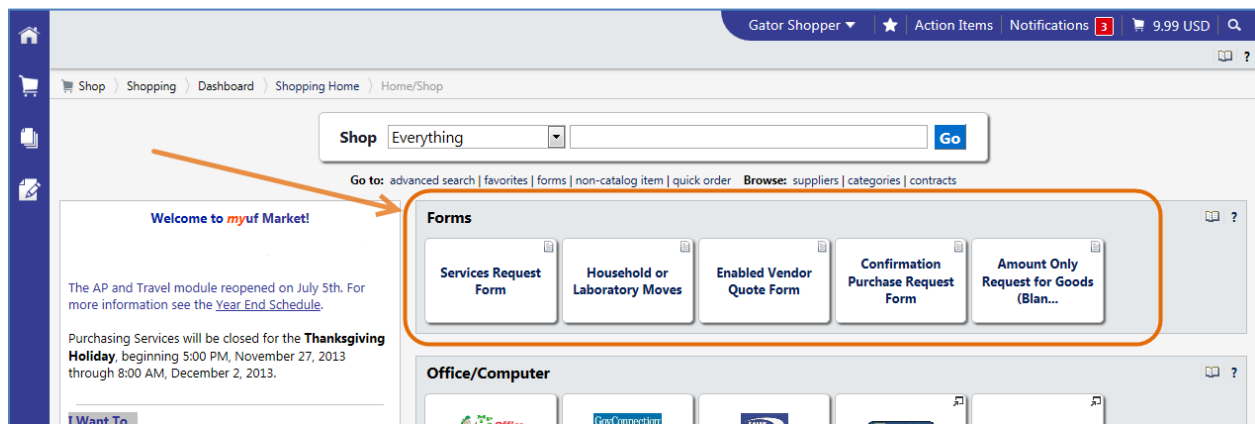
Use this instruction guide to learn how to shop using forms in myUF Marketplace. Use the Standard Service Request Form for any service, examples include: maintenance, repair, printing, catering, consultants, or temporary work. Forms are added to the Active Cart and become a line item in that cart to be processed in the requisition. Refer to the instruction guide, "Shopper's Guide to myUF Marketplace," to create a new cart before shopping. Forms are found in the Forms showcase on the Home/Shop page. Click the link for the form you need, or mouse over the link to read the tooltip with more information. Use the Browse All link for a complete list. You may also find forms in the system by entering a keyword such as "Service" into the Shop at the Top search field and clicking GO. The result set will display the Standard Service Request Form. See the "Using the Product Search" instruction guide for additional information.

Access myUF Marketplace by navigating to <http://my.ufl.edu> and logging in with your Gatorlink username and password, and navigate by:

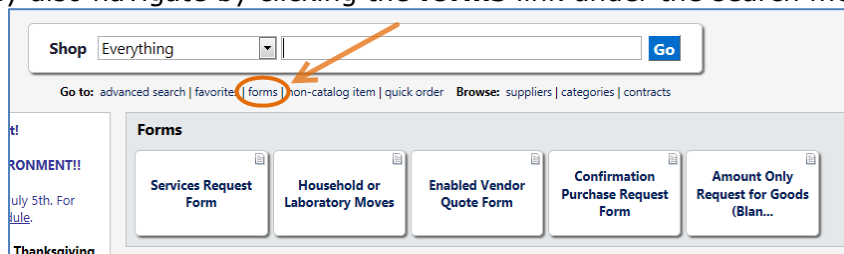
- a. **Clicking Nav bar > Main Menu > My Self Service > myUF Marketplace** for UF_N_MKT_Shopper role.
- b. **Clicking Nav bar > Main Menu > Financials > eProcurement > myUF Marketplace** for UF_N_MKT_Shopper_Req role (to shop only) UF_N_MKT_Reqstor and UF_N_MKT_Financial Approver.

Standard Service Request Form

1. Use the Forms showcase on the Home/Shop page.



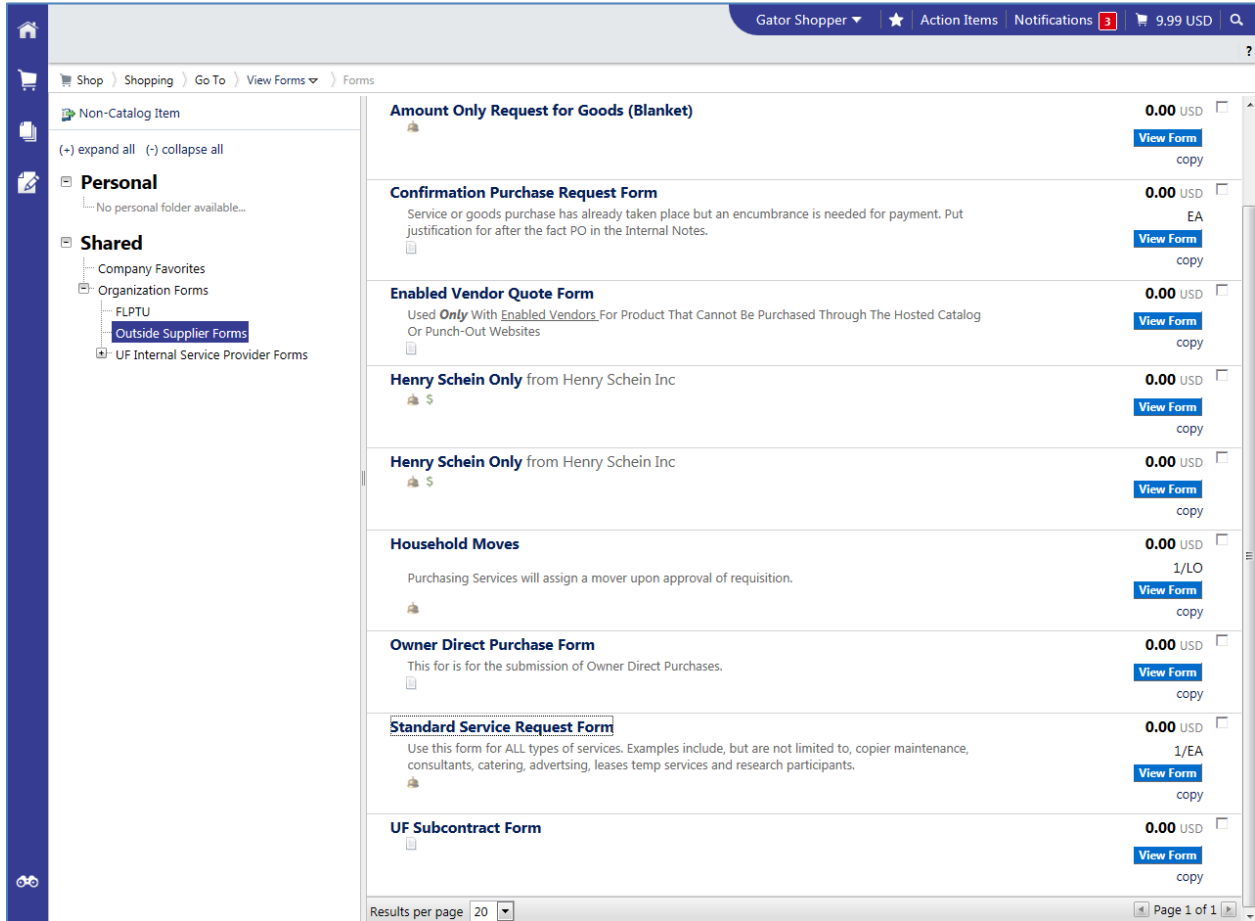
2. Mouse over any Forms link to read more about that form. Click the link for the form you need.
3. You may also navigate by clicking the **forms** link under the search menu.



4. Click the plus (+) sign next to **expand all** to open the menu.

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5. Click on **Organization Forms > Outside Supplier Forms**. Click on the form name **Standard Service Request Form** to open the form.



6. Follow the instructions on the form and complete the following fields:
 - a. Search for and select a supplier--Enter part of the vendor name in the **Enter Supplier** field and click the vendor from the dropdown list displayed.
 - b. If you do not see your vendor, click the option at the bottom of the list--"Click here to view more supplier results." Or click **supplier search** below the Enter Supplier field.
 - c. Enter **Commodity Code** – click the **search...** link.
 - For a complete list of Commodity Codes, refer to the Procurement website <http://www.purchasing.ufl.edu>.
 - d. The first field for **UOM** (Unit of Measure) is always a "1" for service.
 - e. The second field for **UOM** (Unit of Measure) select from the dropdown.
 - f. Enter **Estimated Cost**.
 - g. Enter the **Quantity**.
 - h. Enter **Service Start and End Dates**.
 - i. Enter **Description** – include a thorough description of the service (deliverable) being provided.
7. When the form is completed, click the **Available Actions** dropdown at the top right.
8. Select **"Add and Go to Cart"** if finished.

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9. Select "**Add to Cart and Return**" if adding a second line.
10. Click the **GO** button.

The screenshot shows the 'Standard Service Request Form' interface. At the top right, it says 'Available Actions: Add and go to Cart' with a dropdown arrow, a 'Go' button, and a 'Close' button. The form is divided into three main sections: 'Header Information', 'Supplier Information', and 'Service Request Information'.
1. **Header Information:** Includes the University of Florida logo and 'Service Form Instructions'. The instructions state: 'Use this form to request services from non-UF suppliers. Examples of services include printing, catering, independent contractors and consultants, repairs and maintenance to equipment and buildings, and training. Rate, Date, and Deliverable information is required and corresponds to the not to exceed, begin and end date, and Description fields on this form. Consult the Purchasing website for guidelines in preparing requisitions to independent contractors and consultants (http://purchasing.ufl.edu). Place attachments and comments within the cart.'
2. **Supplier Information:** Has a text input field for 'Enter Supplier' and a link for 'supplier search'.
3. **Service Request Information:** Contains fields for 'Commodity Code' (with a search dropdown), 'UOM' (set to 'EA - Each'), 'Estimated Cost/Fee per unit (not to exceed)', 'Quantity' (set to '1'), 'Service Start Date - Service End Date' (with a date range selector), and 'Description' (with a text area). At the bottom right, it shows 'Total 0.00'.

In the Requisition:

1. Change **Distribute By** to Amount instead of Quantity.
 - a. In the requisition (click the Review button inside the cart), in the **Billing** section, under **Other Information**, look for **Distribute By**.
 - b. Click the **Edit** button by the Distribute By.
 - c. Use the dropdown to select Amount instead of Quantity.

Next Steps

1. As a shopper, assign your cart to a requestor.
 - Refer to the instruction guide, "Shopper's Guide to Using myUF Marketplace".
2. As a requestor, complete the requisition.
 - Refer to the instruction guide, "Completing a Requisition in myUF Marketplace"

For further assistance, e-mail procurement@ufl.edu or contact Procurement Services Help Desk at 392-1335.