Shopping in the Marketplace

Instructions to help Shoppers access the Marketplace, create shopping carts for orders, and assign carts to an Assignee who will complete the purchase.

As of November 2013, Marketplace was officially announced as the PREFERRED method for procurement needs regarding vendors who are cataloged in this system. Staples is still the exception, meaning we are required to use Marketplace to purchase from them, unless you cannot find the item you need or you need an item the same day of order.

Online training and resources are available at: <https://www.cu.edu/psc/traininghelp/learningresources/cu_marketplace/>

Vendor Catalog Guides act as a step-by-step guide for each unique vendor’s site: <https://www.cu.edu/psc/traininghelp/learningresources/cu_marketplace/punchout_hosted_guides.htm>

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| Step | Instructions |
| 1 | To access Marketplace, follow this link and please bookmark it for future access:  <https://portal.prod.cu.edu/MyCUInfoFedAuthLogin.html> |
| 2 | Type in your CU login name and Identikey password. |
| 3 | CLICK the Marketplace button in the lower right hand side of the screen. |
| 4 | Once Marketplace opens and the screen appears showing all the Vendor boxes, CLICK the Vendor box you want and then CLICK the word “Punch-out” that appears below the Vendor’s box. The Vendor’s website will appear and you can shop directly from the website. |
| 5 | Start shopping! The screen that now appears should be familiar and look much like the screen you’ve used in the past to make a purchase from the Vendor you’ve selected. |
| 6 | Proceed to Checkout when your shopping is complete. |
| 7 | Confirm the order. |
| 8 | A new screen will appear as you are brought back into the Marketplace. CLICK in the box next to “Name this Cart”. Here you should name your cart with your Last Name, Vendor Name and Date. Ex: Smith Staples 9/14/11 |
| 9 | CLICK the Update box. |
| 10 | CLICK the Assign Cart box. |
| 11 | CLICK “Search for assignee”. TYPE the name “Bender” or “Mansbach”. SELECT “Marilynn Bender” or “Ruth Mansbach” as the Assignee. You may SELECT the “Add to Profile” box to set up the Assignee as a default for future purchases. |
| 12 | Enter a “Note To Assignee:” in the box provided giving details of the purchase such as lab name, PI, purpose, whether it is a grant related purchase, and speed type (if known). CLICK Assign box. |
| 13 | All shipments will go to the front office to the Shopper’s ATTN unless other directions are indicated in the Note To Assignee or other directions emailed to the Assignee. |
| 14 | The Assignee is notified by the system that a shopping cart has been assigned. If the order is URGENT, please email the Assignee to notify her of the urgency. The Assignee will email the Shopper if there are questions regarding the order. |
| 15 | If the Shopper wants to modify an assigned card, do not try to access the cart to make changes once it is assigned. The Shopper should email the Assignee regarding the needed changes and the Assignee will decide whether the cart can be modified or a new cart created. |