SJSU | FINANCE AND BUSINESS SERVICES

User Guide for CSUBUY

Table of Contents

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 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**.
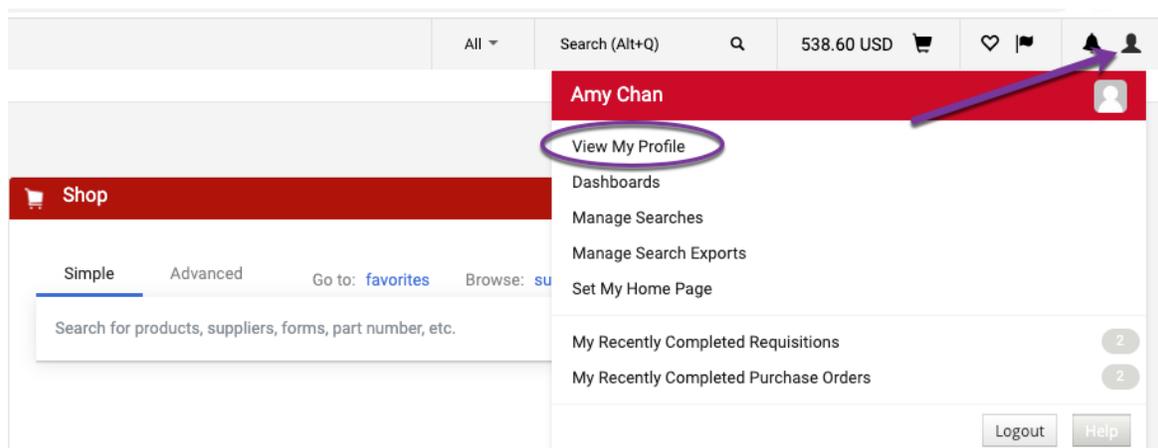
3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Payment Options**.
5. Click **Add a New Card**.
6. The **Card Details** section displays, enter your ProCard information. Though the card is saved in you profile, you will be prompted to enter the 3-digit Card Security Code 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.
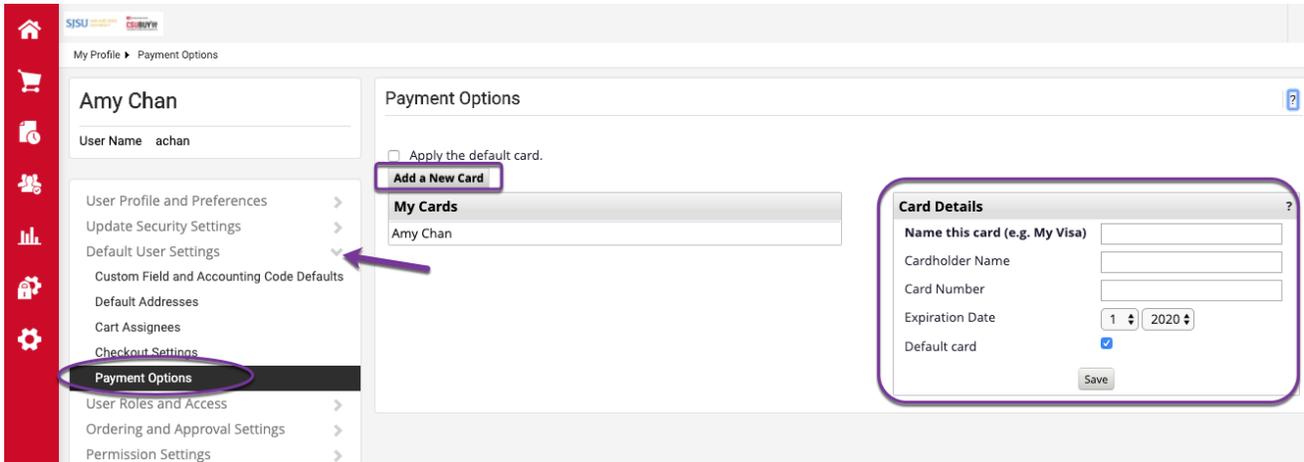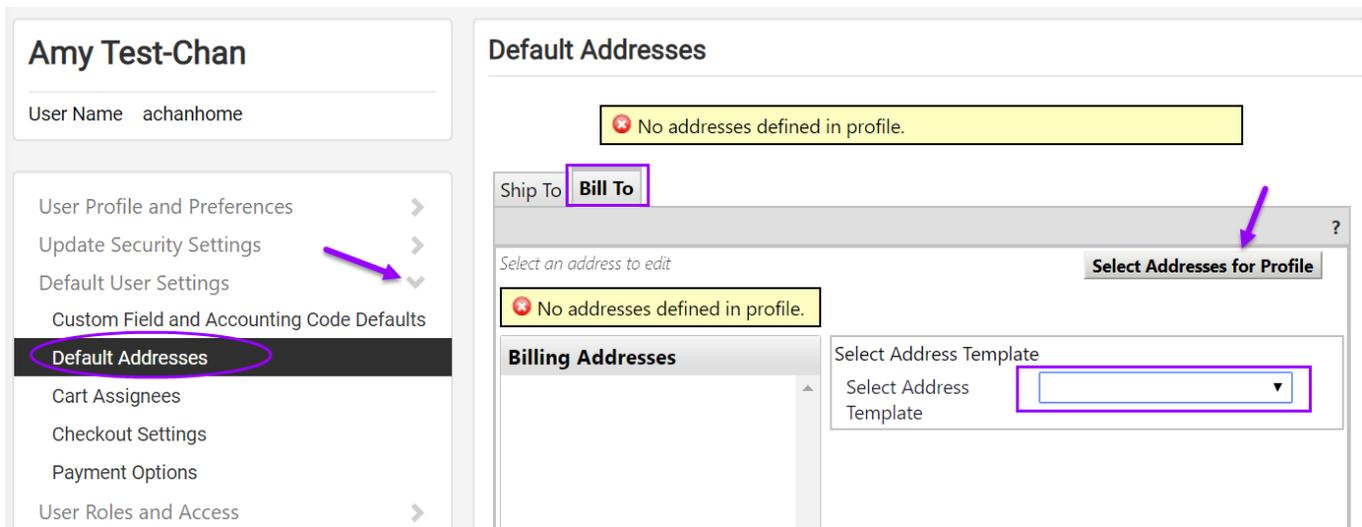

2: Add Ship To

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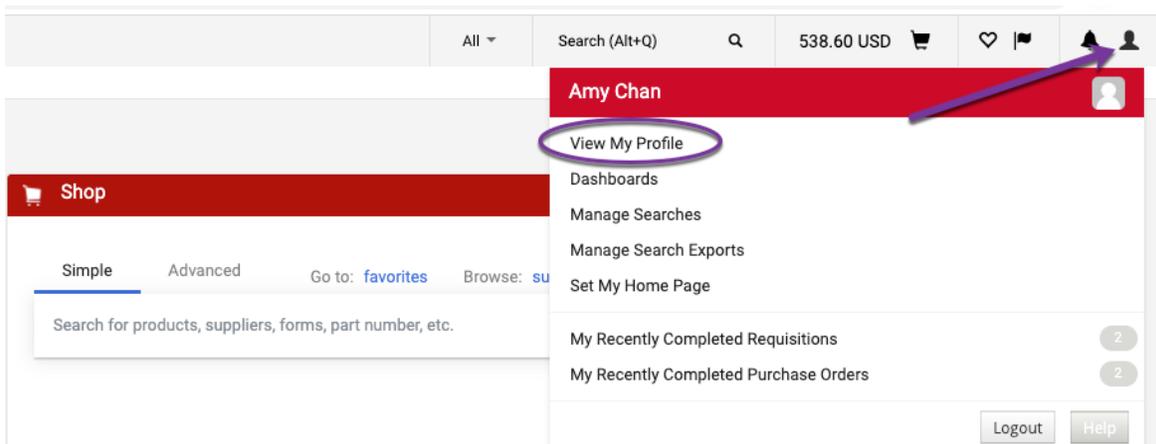
3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Default Addresses**.
5. Click **Ship To** tab.
6. **Select Addresses for Profile**.
7. The **Select Address Template** section displays. Select SJSU location from the dropdown menu in field. **SJSU Distribution Services**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

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**.

3: Add Bill To

1. Click on **Profile** icon.
2. Go to **View My Profile**.
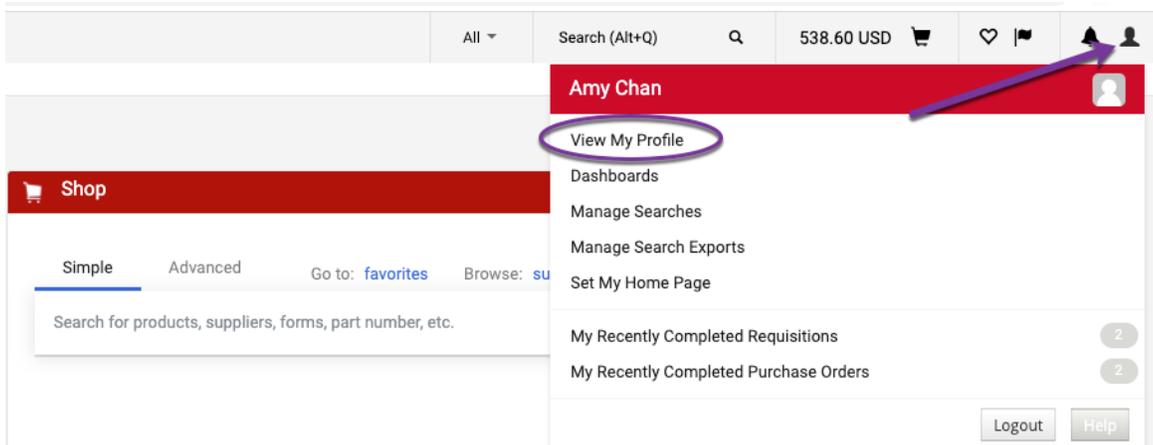
3. **Default User Settings** click the arrow to uncollapse section.
4. Select **Default Addresses**.
5. Click the **Bill To** tab.
6. Click **Select Addresses for Profile**.
7. The **Select Address Template** section displays. Select the appropriate SJSU location for your department from the dropdown 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**.

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.

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.

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

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

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

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

3: Checkout of Supplier's Punch-Out Catalog

6. To checkout of the supplier's catalog, click on the **Cart**.
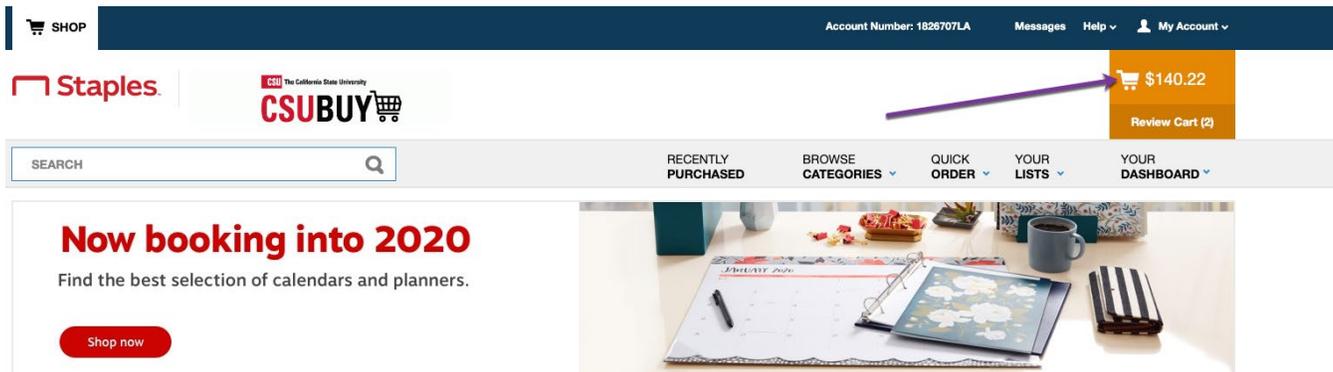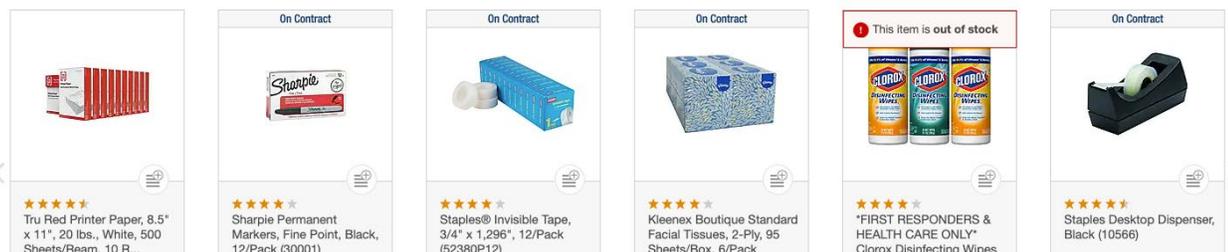
7. Review items in the **Cart** to:

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

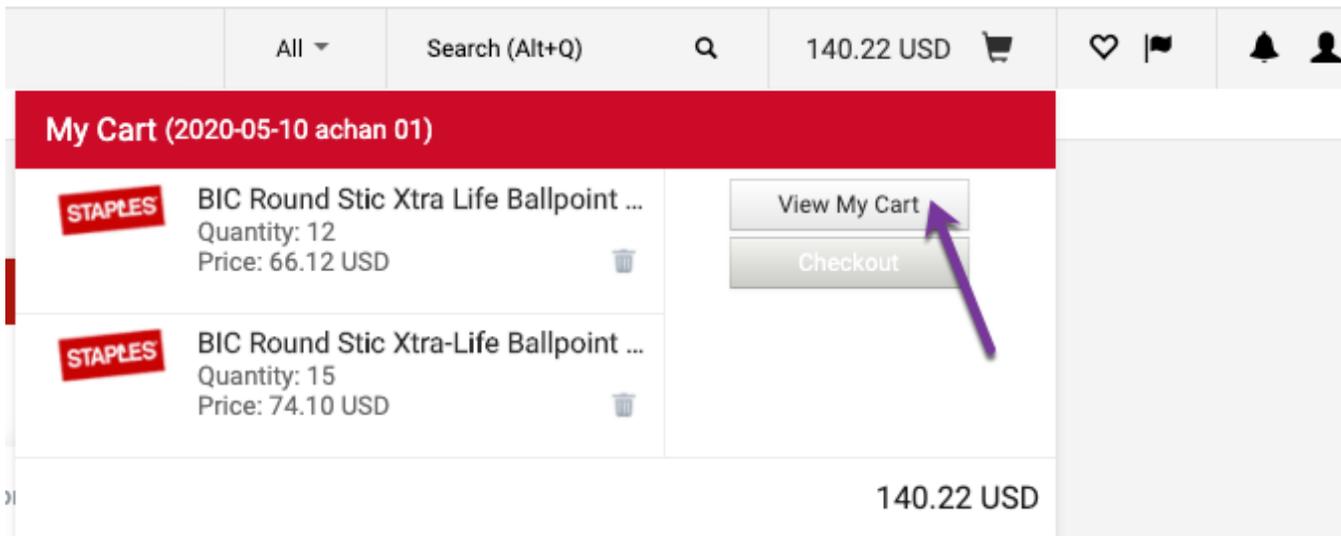8. When ready, click **Submit Order** to send cart to CSUBuy.

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.
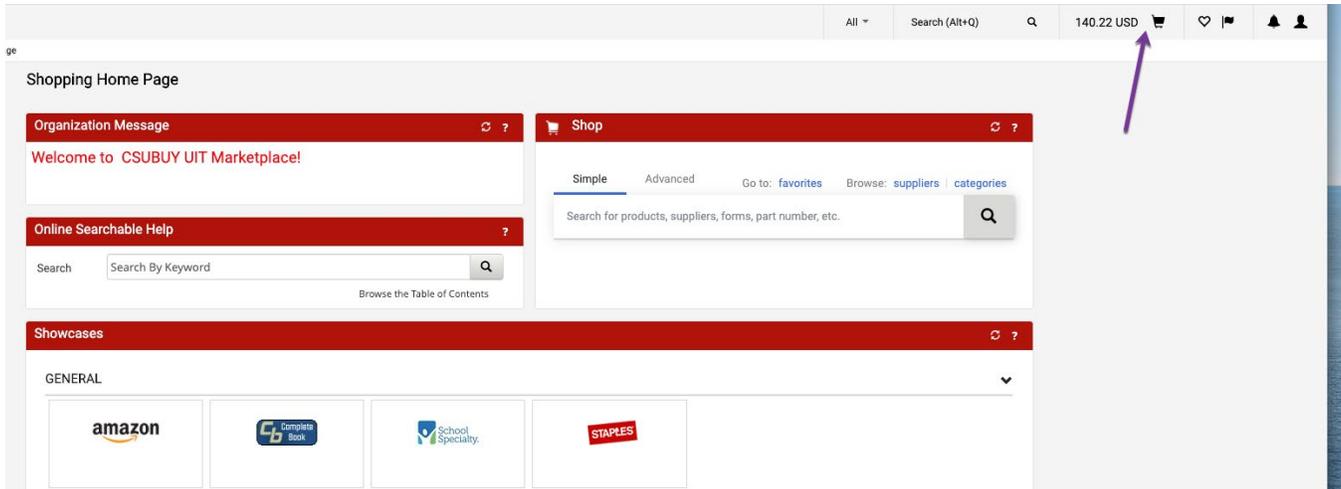
My Cart panel displays.

11. Click **View My Cart**.

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

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

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.
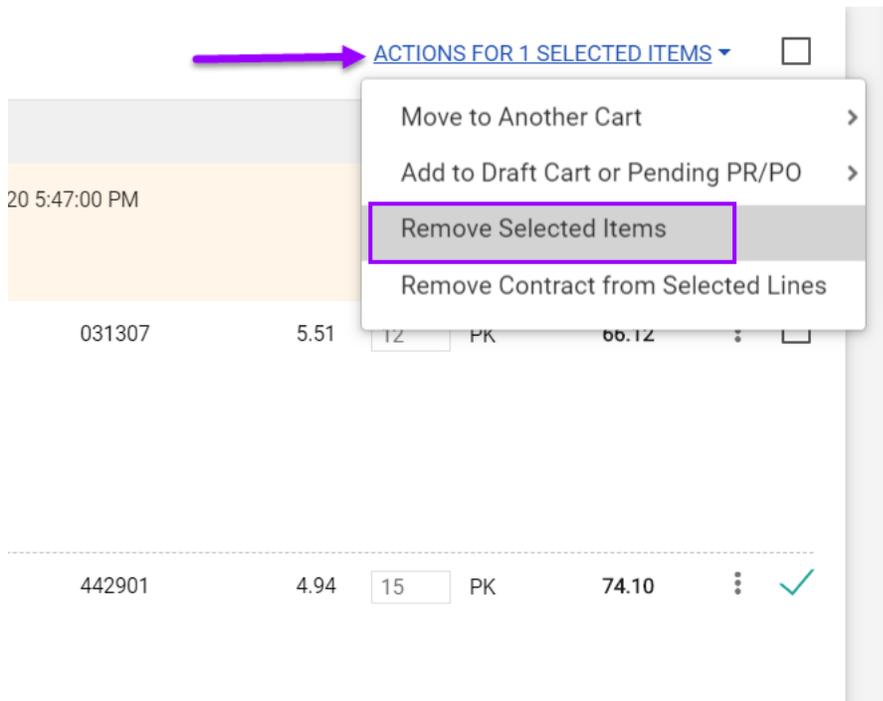
15. When ready, select **Proceed to Checkout** to continue.
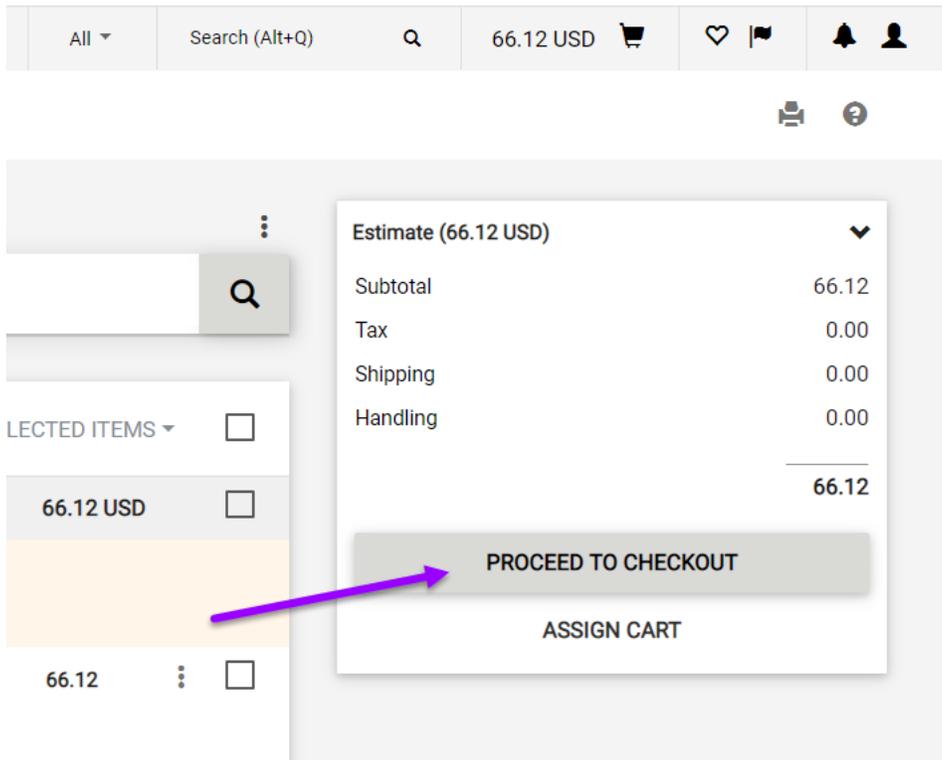
a: Select a Shipping Address

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.

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

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.

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**.

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.
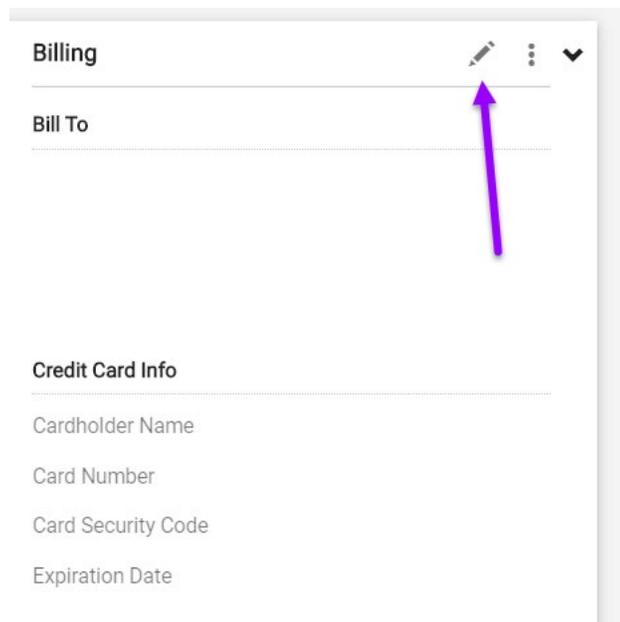
25. Search and select **Bill To** location **SJSU Distribution Services**. There will only be one location displayed in dropdown menu.
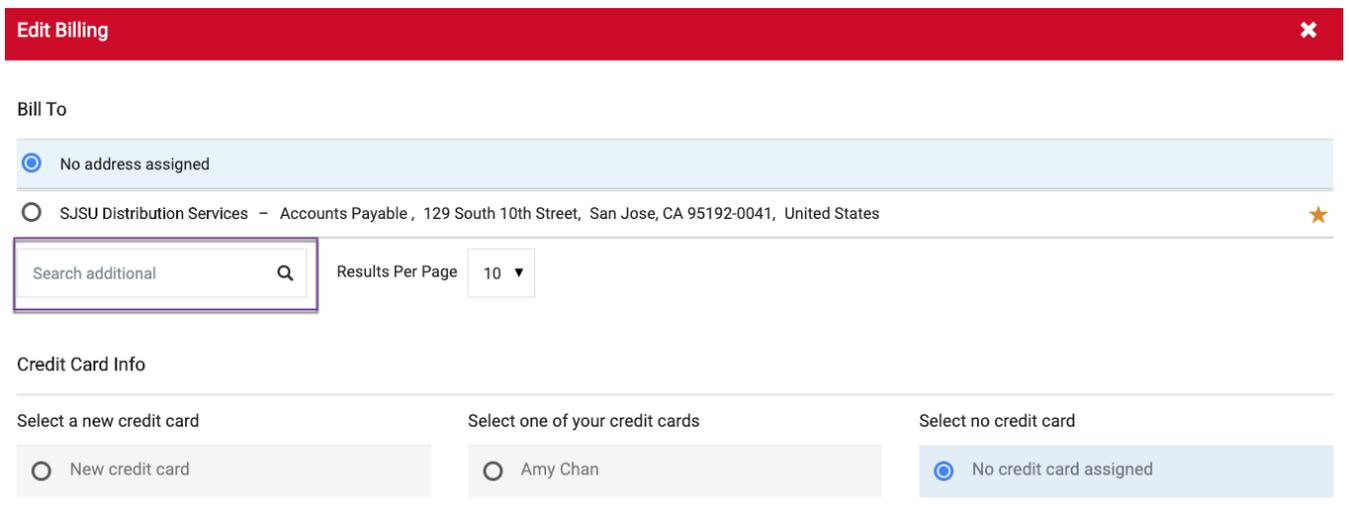
26. Once you've selected the location, check box for **Make default**.
27. Assign a nickname for location
28. Click **Save Changes**.

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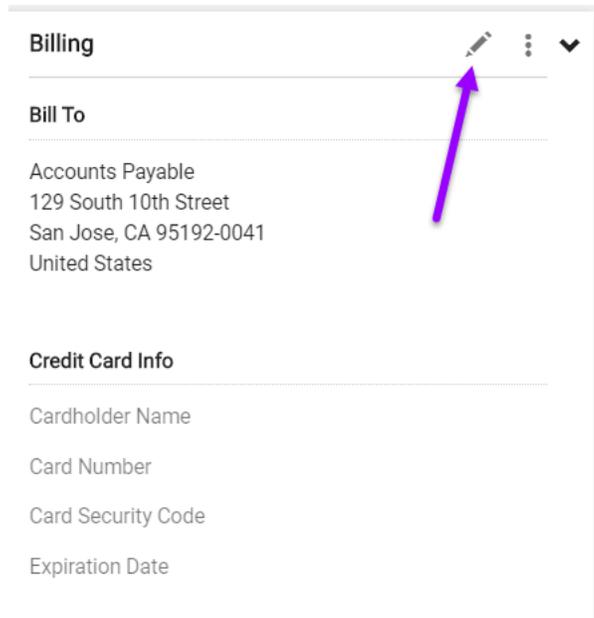
30. Click the radio button for **New Credit Card** or select an existing card under the **Select one of your credit cards** section.

To add new card to the order:

31. Enter card information. Though the card will be saved in you 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**.

Shipping, Billing, and Credit Card Information is completed.

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.

Internal Notes and Attachments		✏ ⋮ ⌄
Internal Note	*no value*	
Internal Attachments	ADD	
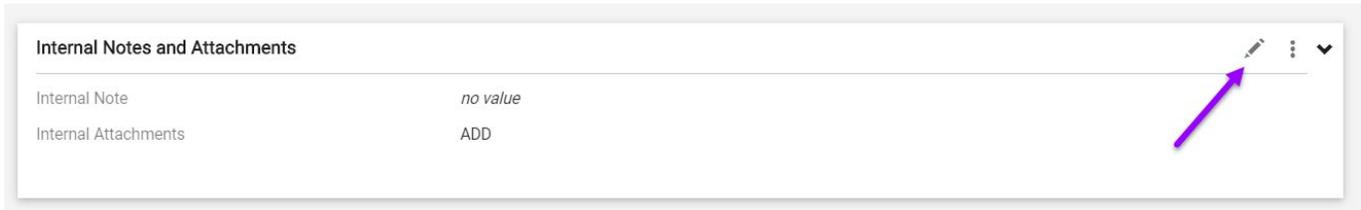
Edit Internal Notes and Attachments display.

36. Enter comments.
37. Click **Save Changes**.

Edit Internal Notes And Attachments ✖

Internal Note

Internal Note	Order is for Professor Jane Smith.

966 characters remaining   expand | clear

SAVE CHANGES   CLOSE

Comment displays.

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.

f: Place Order to Supplier

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

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

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.

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.

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

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.

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**.

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

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

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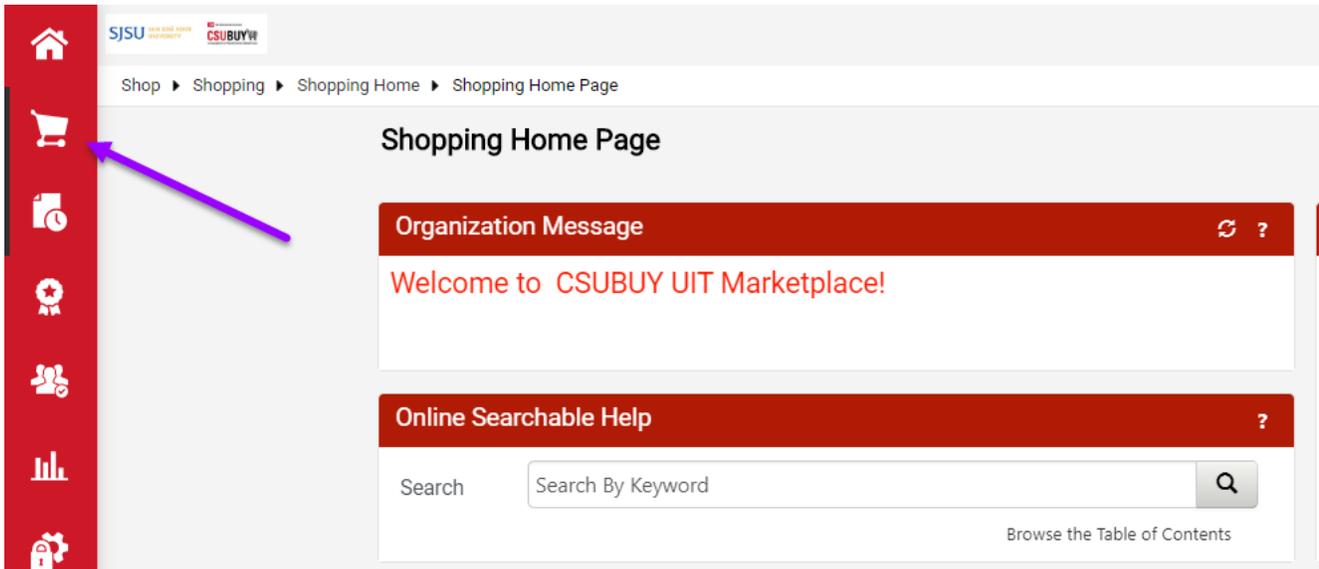
2. Navigate to **My Carts and Orders** > **View Carts**.

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.
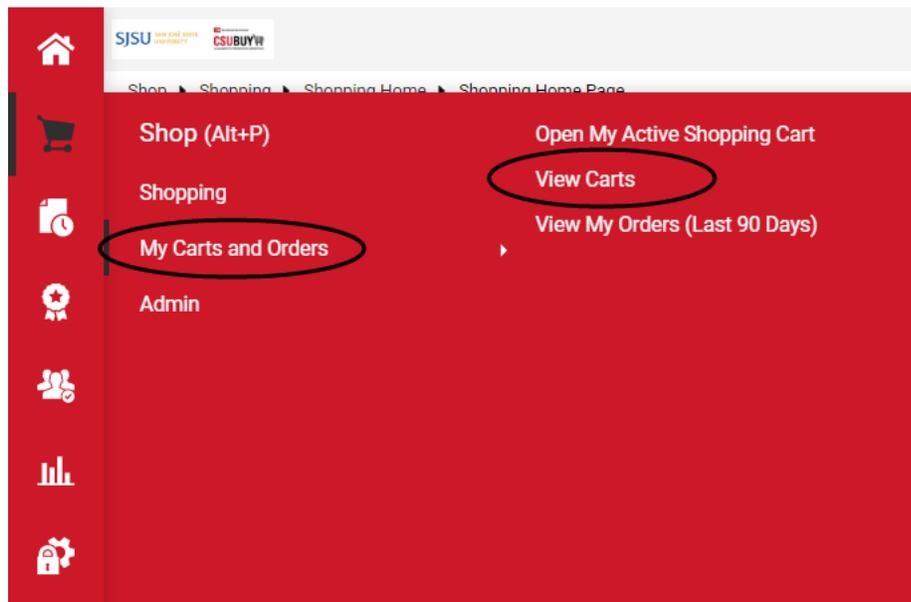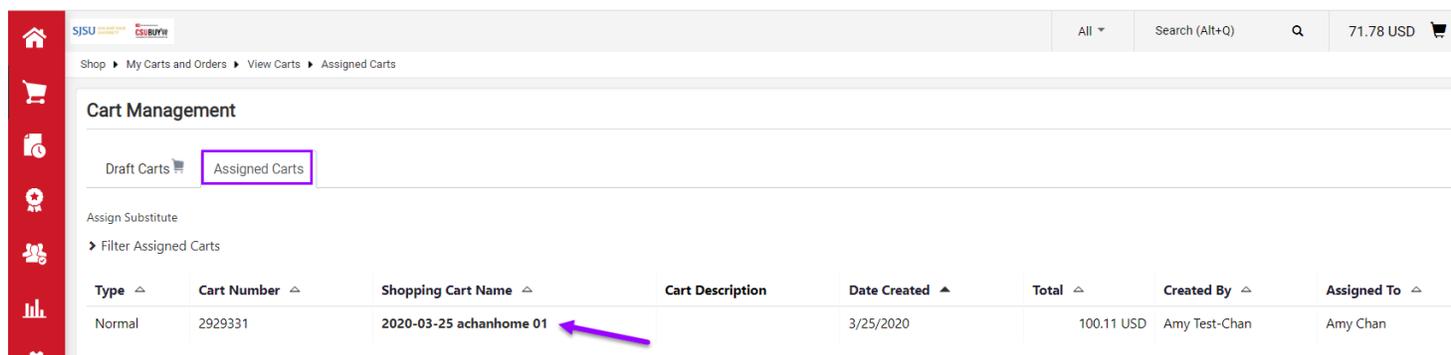
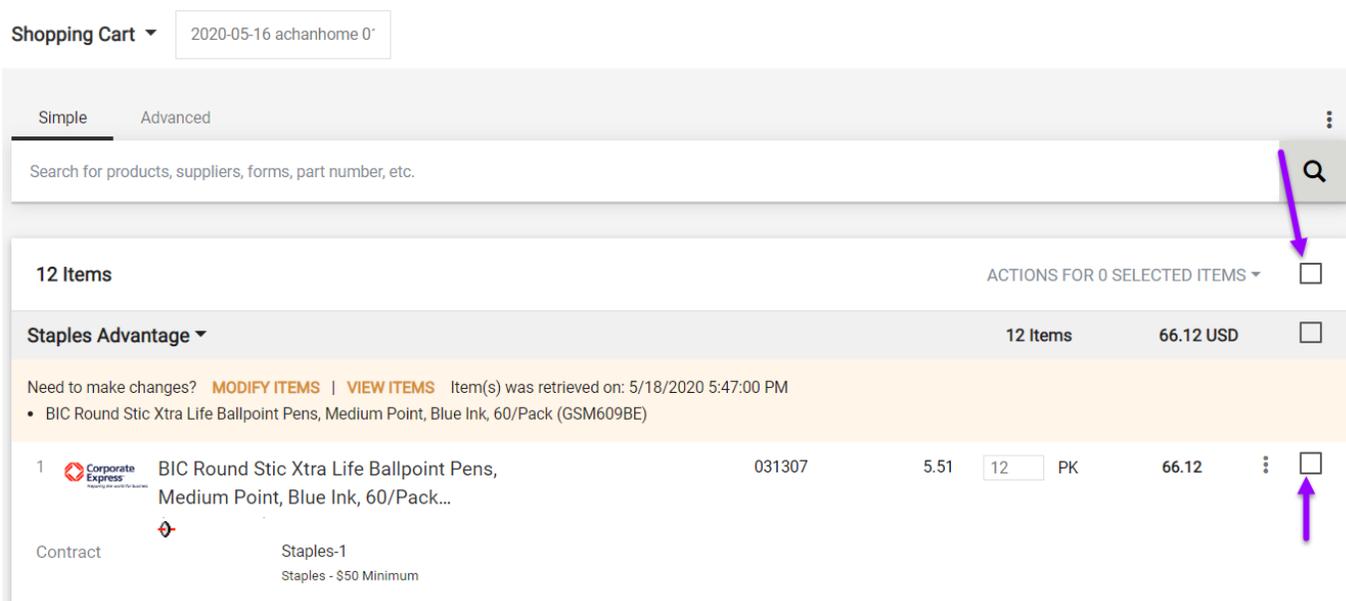

Draft Cart
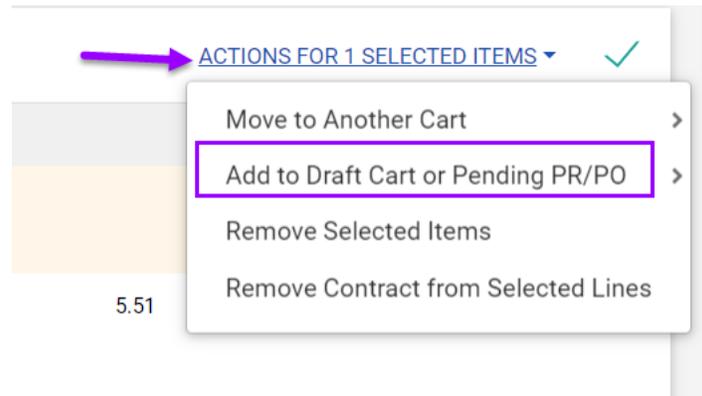
1: Move an Active Cart to Draft Cart

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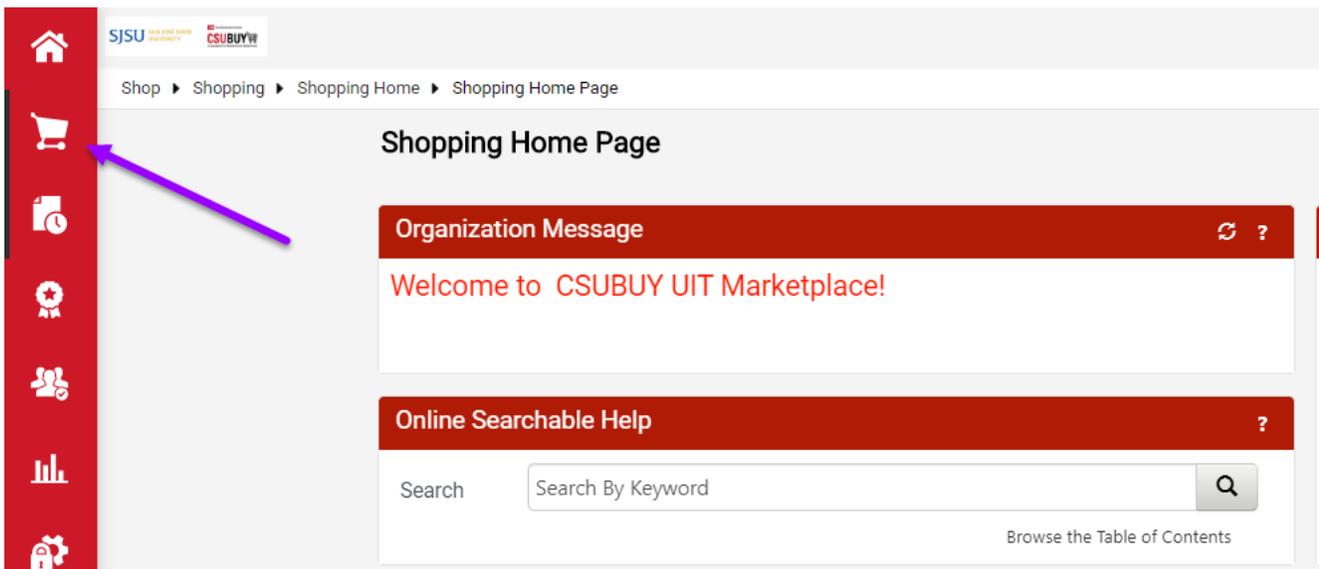
3. Go to Actions for Selected Items.
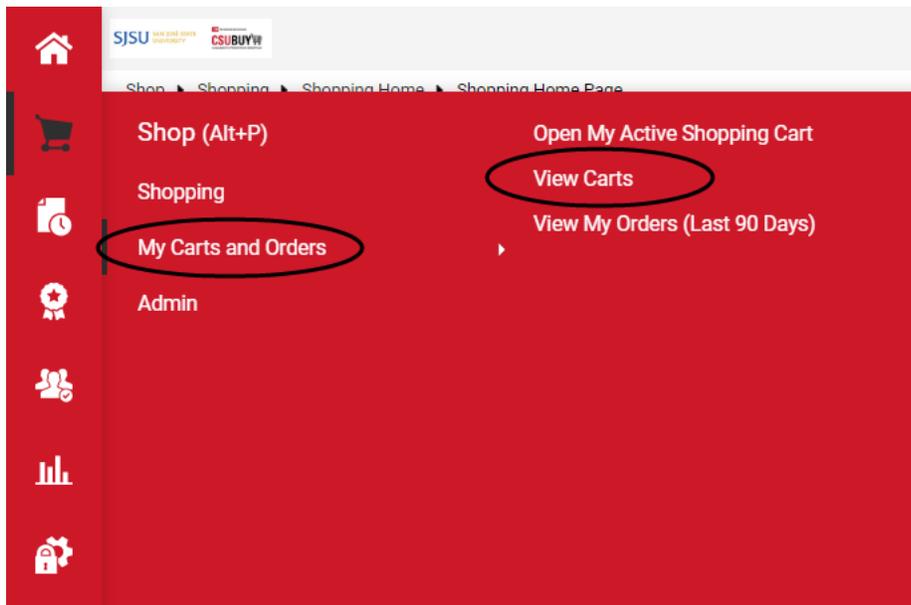4. From dropdown menu, select **Add to Draft Cart or Pending PR/PO**.

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. .

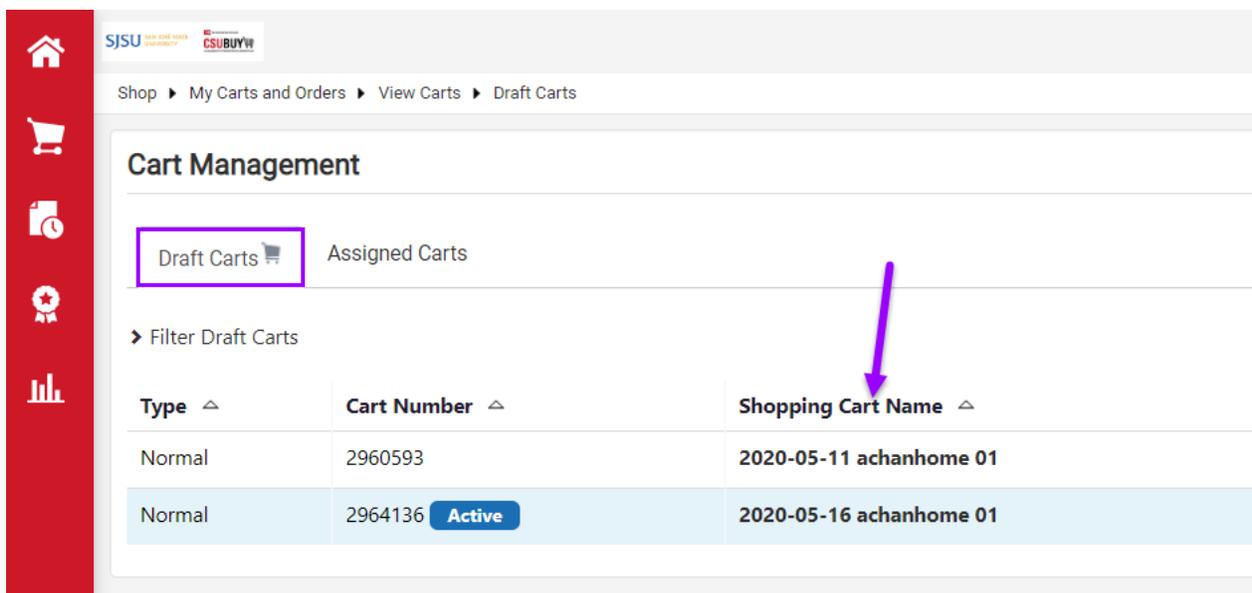1. From CSUBUY homepage, click the Shopping Cart icon.

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".
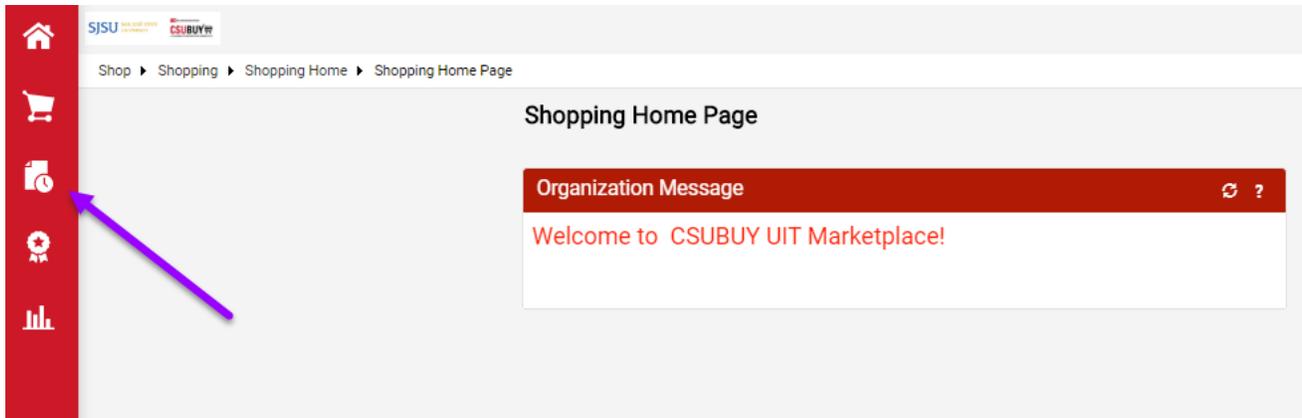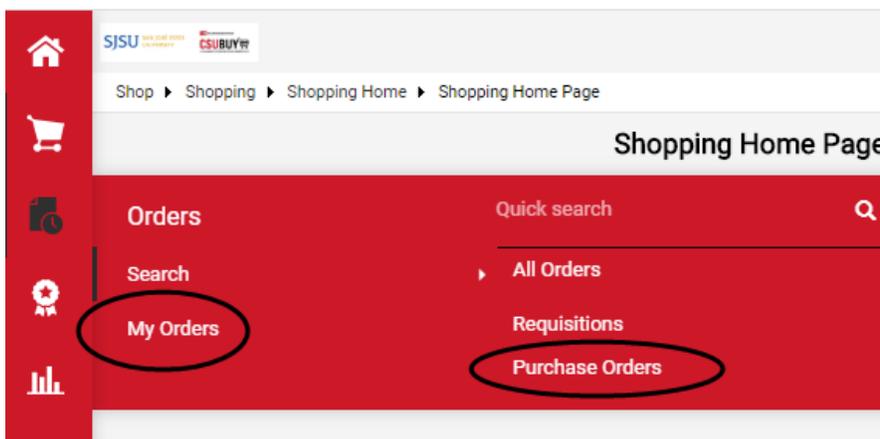4. Follow the steps in Prepare and Submit Order in CSUBUY to complete the purchase.

Purchasing History

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

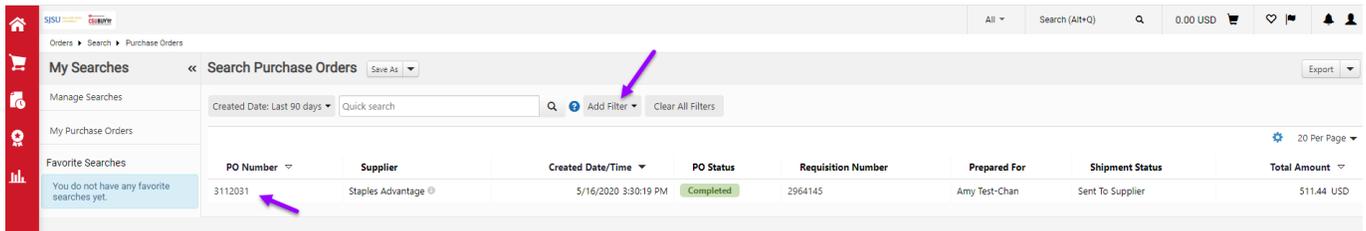1. To locate the assigned cart, from CSUBUY homepage, click the Orders icon.

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.