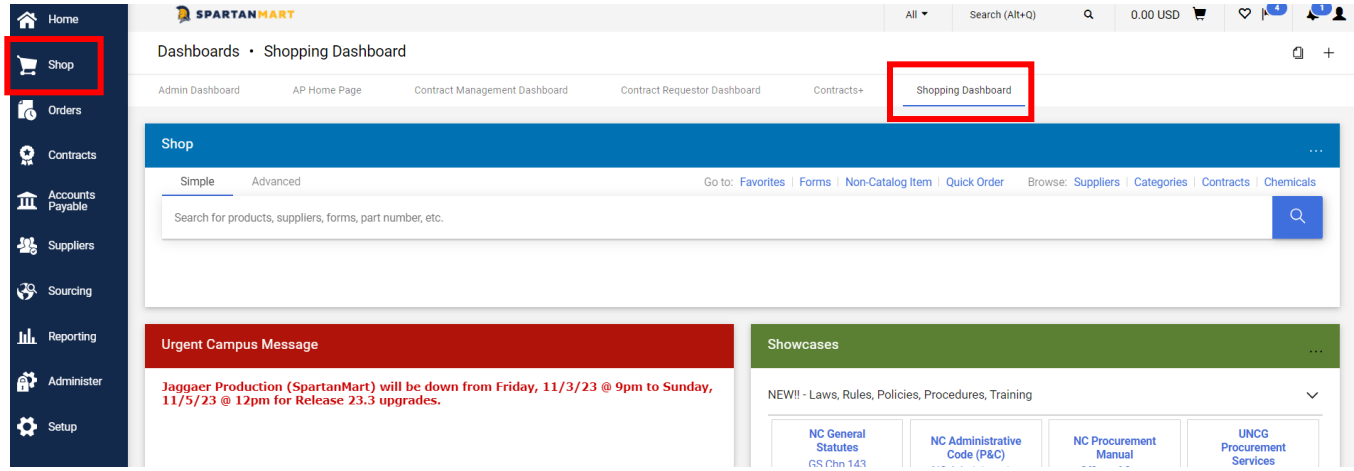
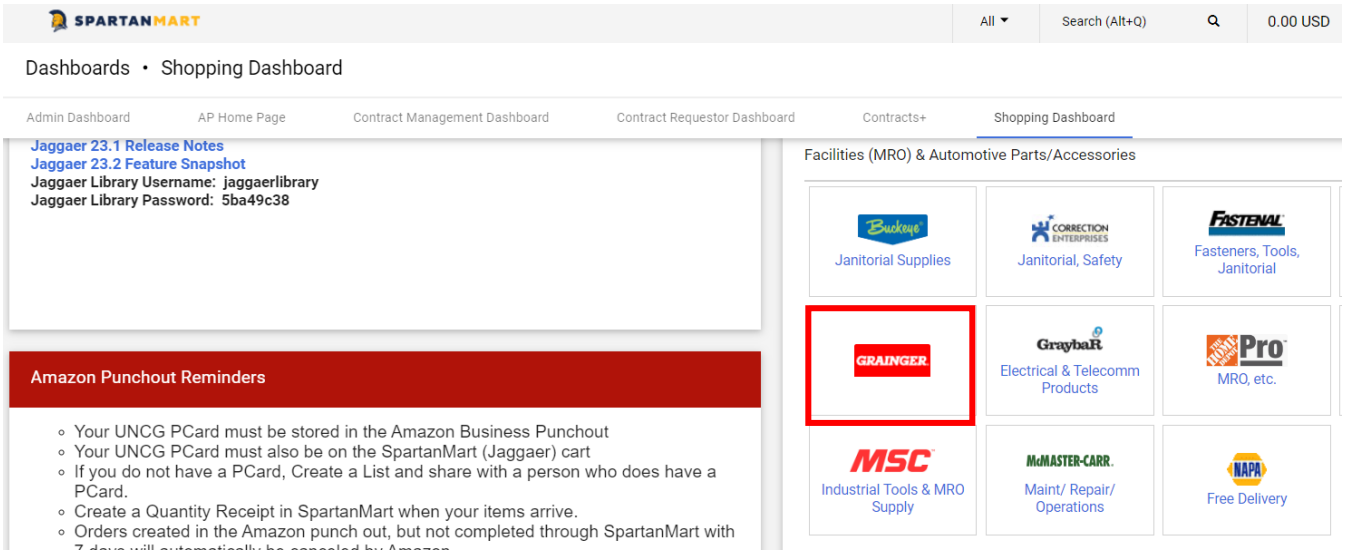
Creating a Punchout Order

1. You can create a Punchout Order from the Shopping Dashboard. This is what the Shopping Dashboard looks like. Most SpartanMart Users, the Shopping Dashboard is the Home page. If for some reason your screen doesn't look like this, Click the Shop Cart Icon

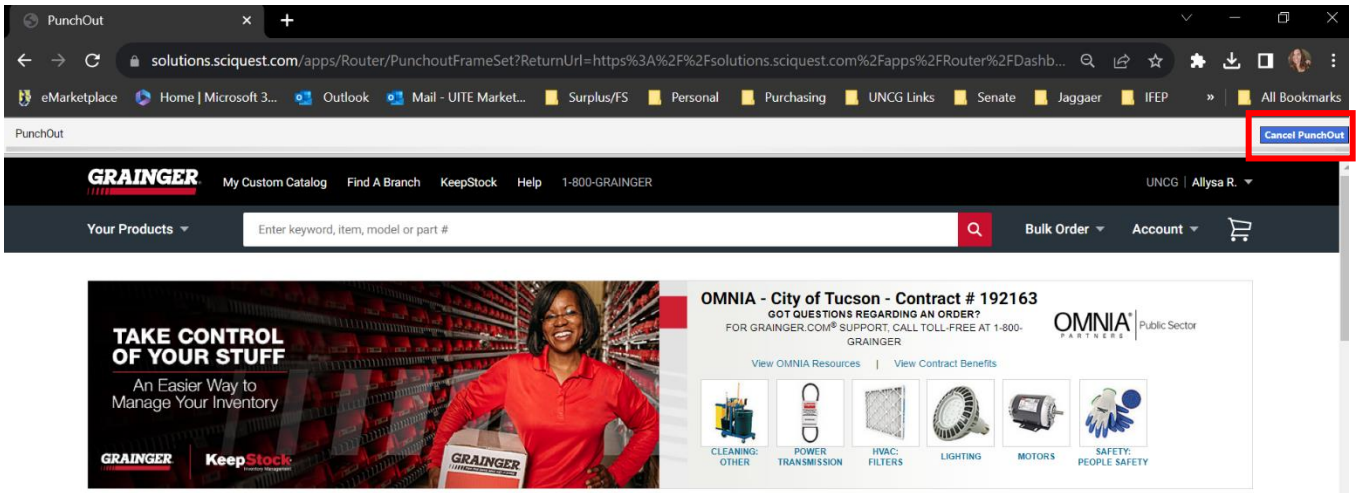
on the Left side.



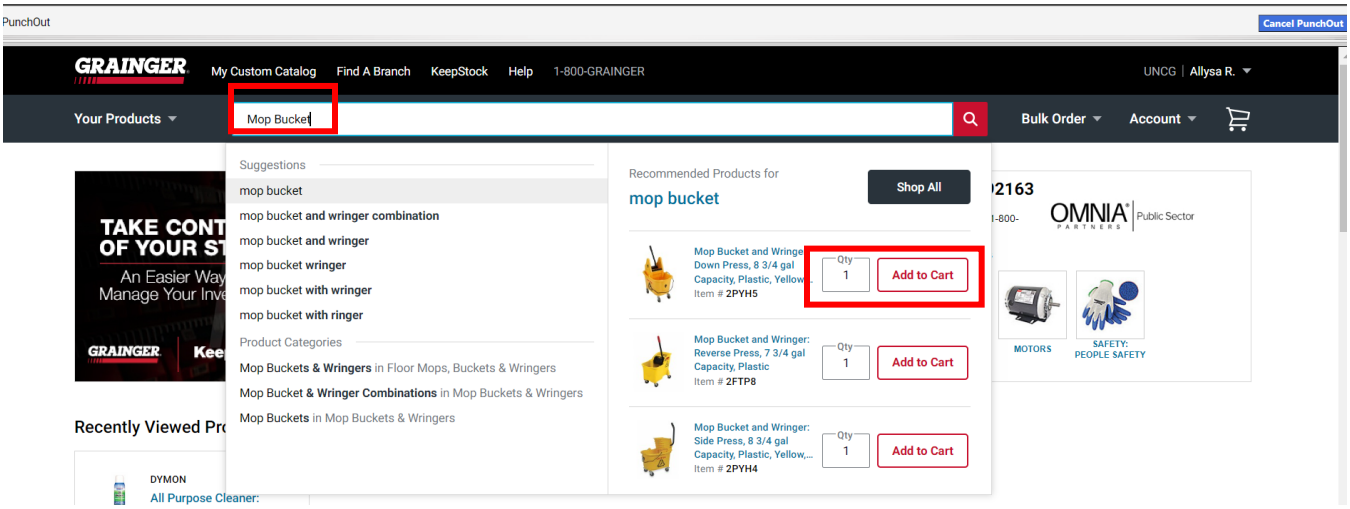
2. Click on the Supplier's Punchout that you would like to purchase from.



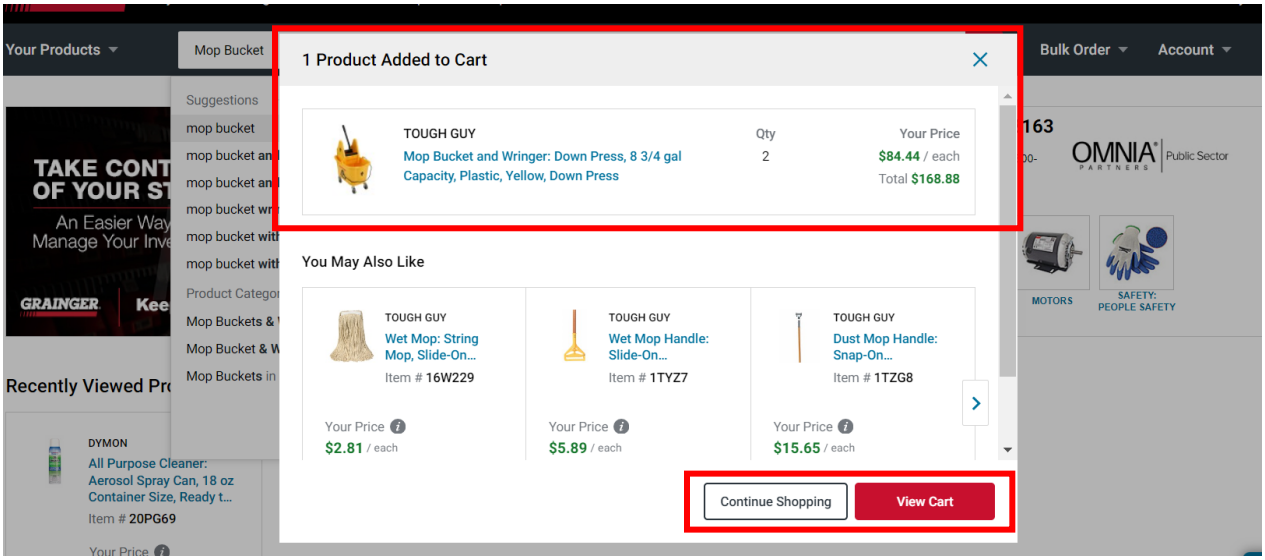
3. The Punchout will open. If for some reason this isn't the Store you wanted to shop at Click the Cancel Punchout button in the Top Right of the screen.



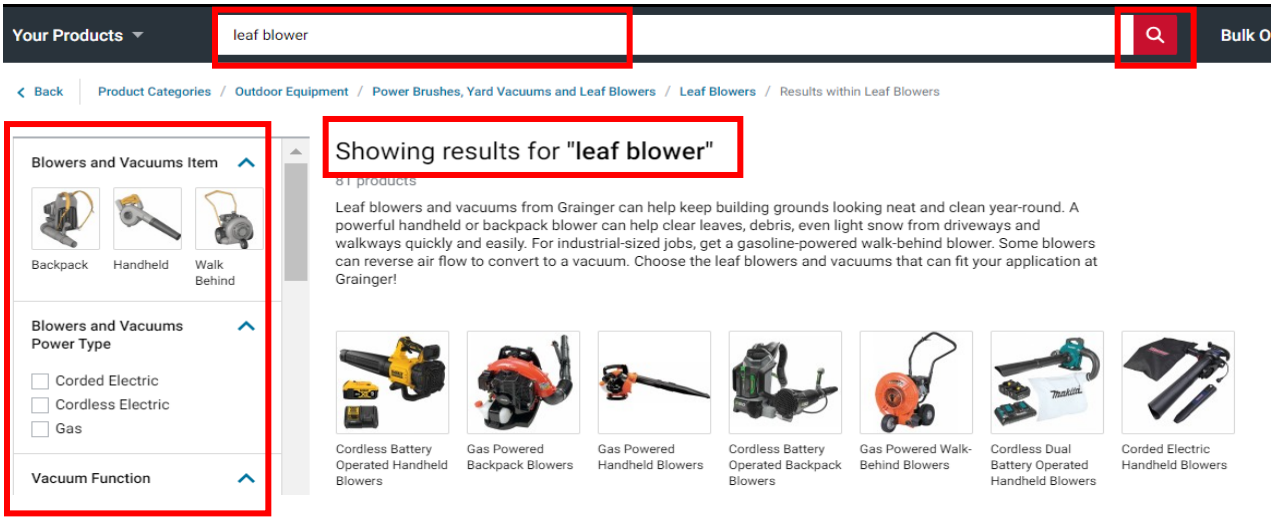
4. Search the items you are looking for using the search bar. Add the items to you cart. Increase the QTY if you would like more than 1 added to your cart. Recommended products could pop up.



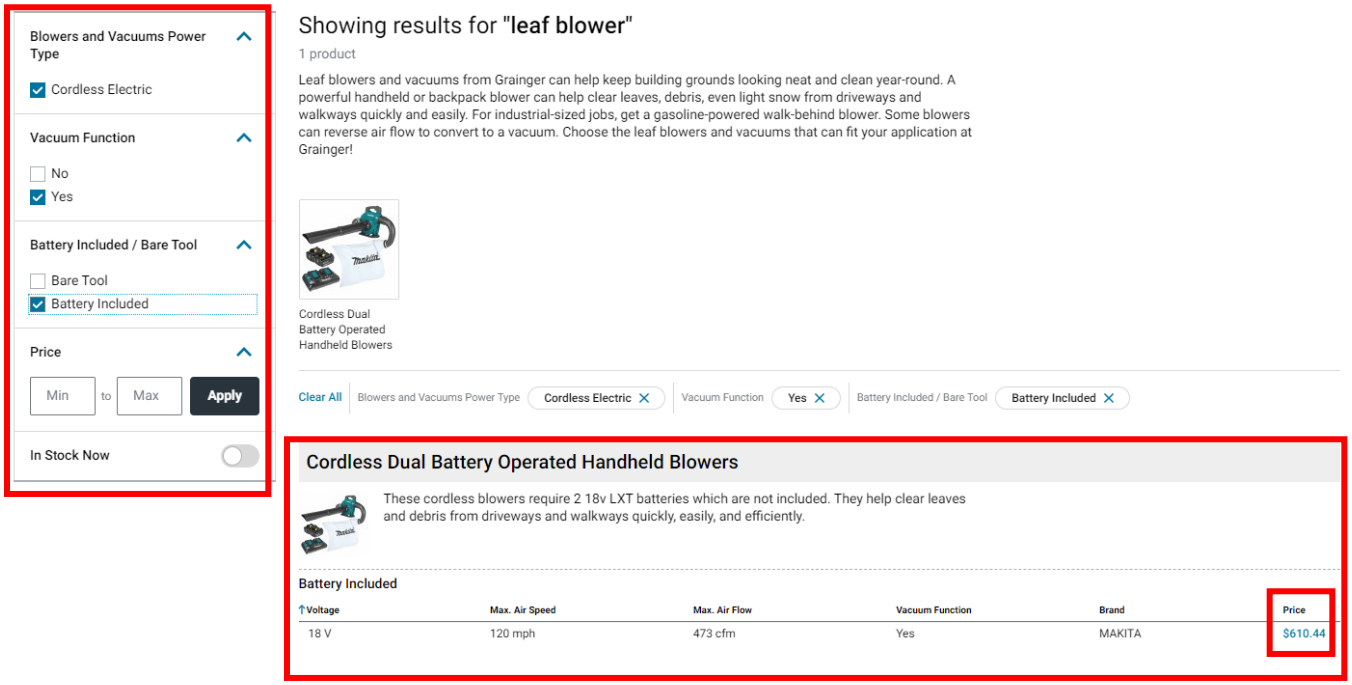
5. You will see a confirmation of what you added to your cart in the Pop-up. You can click 'Continue Shopping' or click 'View Cart'.



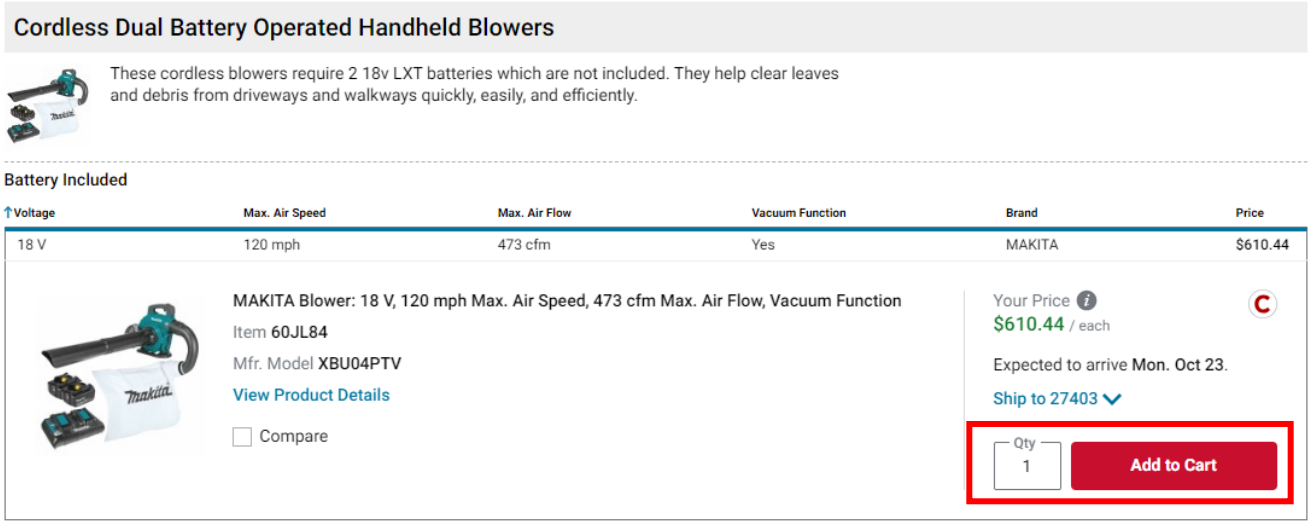
6. For this example, we will click 'Continue Shopping'. Search for your next item using the search bar. Click the magnify glass if the option you want is not displayed in the recommended items that pop up.



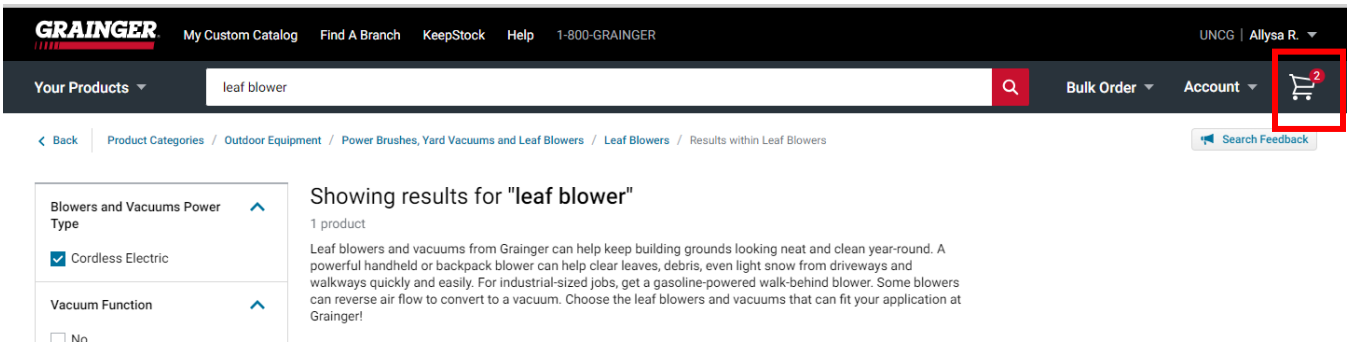
7. You can filter these options to find the item you want. Click the price that is blue to expand the information about that item.



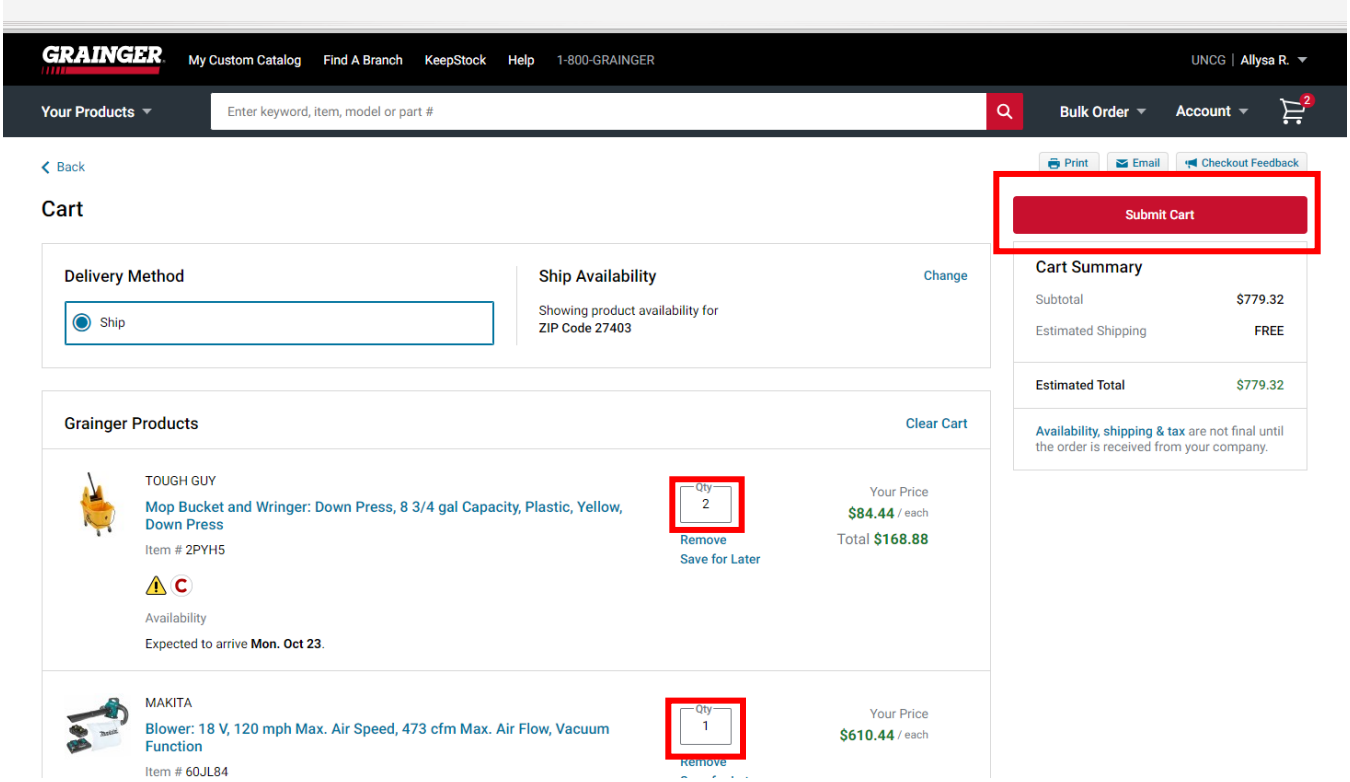
8. Now it should look like this. Click 'Add to Cart' if you want to purchase this item.



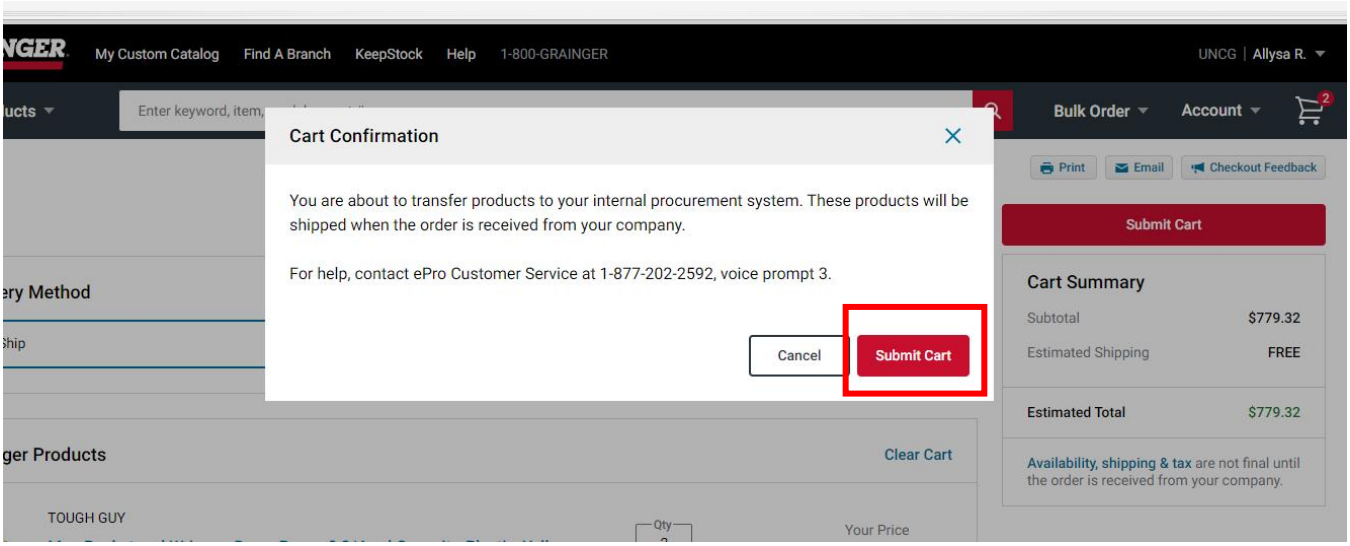
9. If you are done adding items to your cart, you can 'Click View cart' or if that pop up was closed, you can 'Click the shopping cart' Located in top right corner.



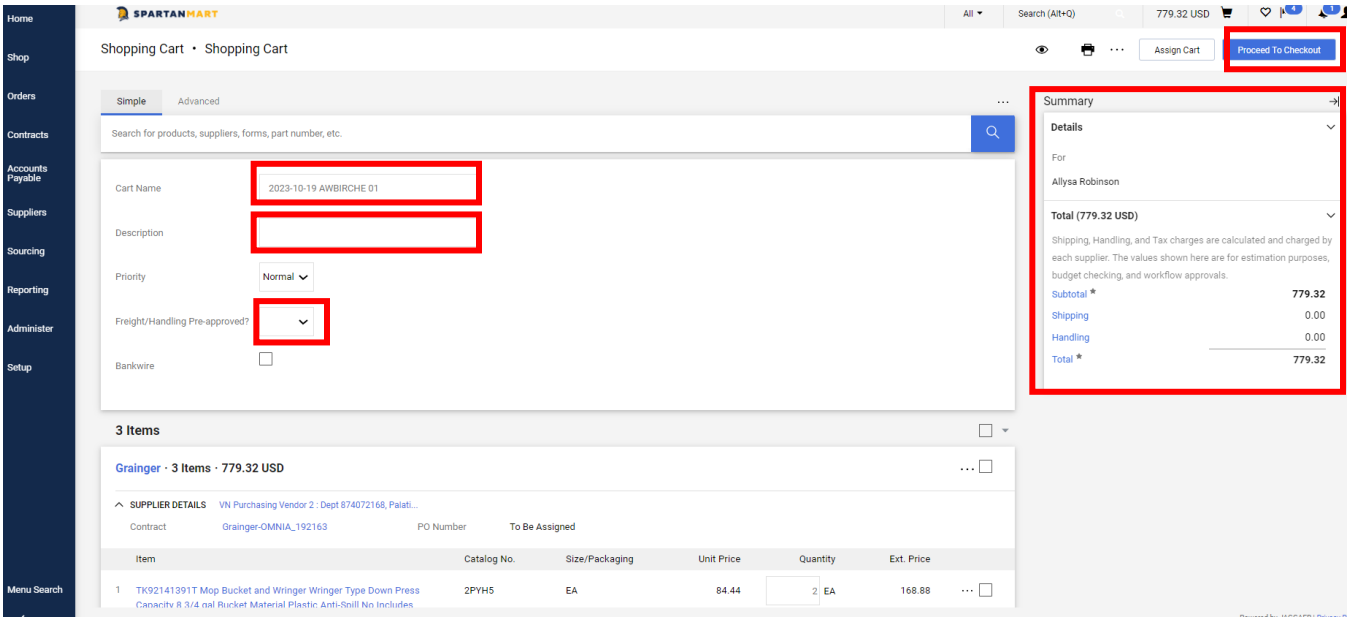
10. You will see a summary of the items in your cart, verify the items and QTYs to make sure they are correct. Then Click 'Submit Cart'.



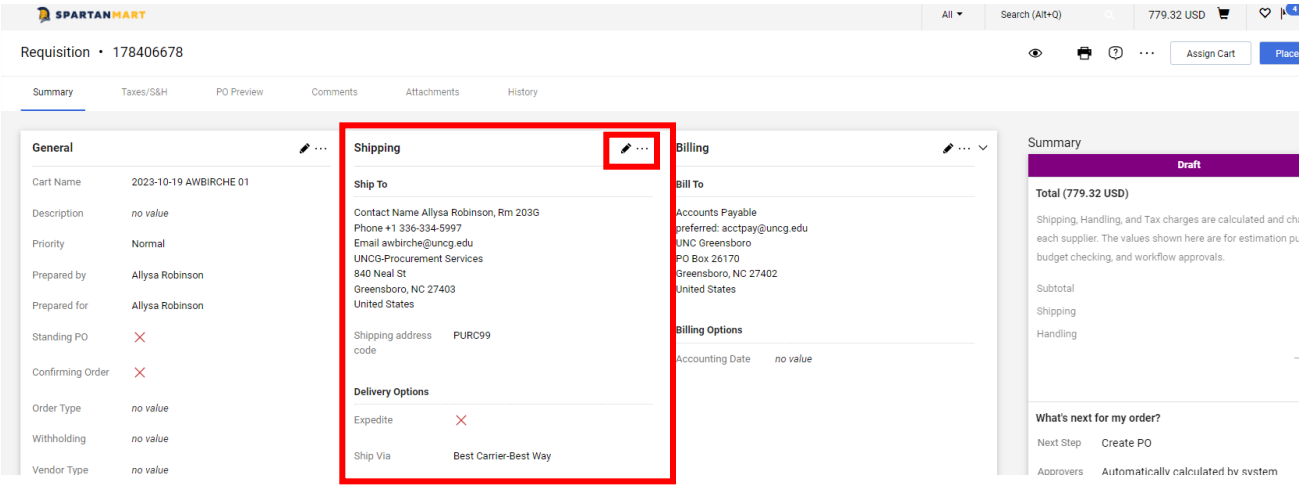
11. A pop up will appear, Click 'Submit Cart'. You will now be redirected to SpartanMart Cart as you just submitted your Punchout Cart.



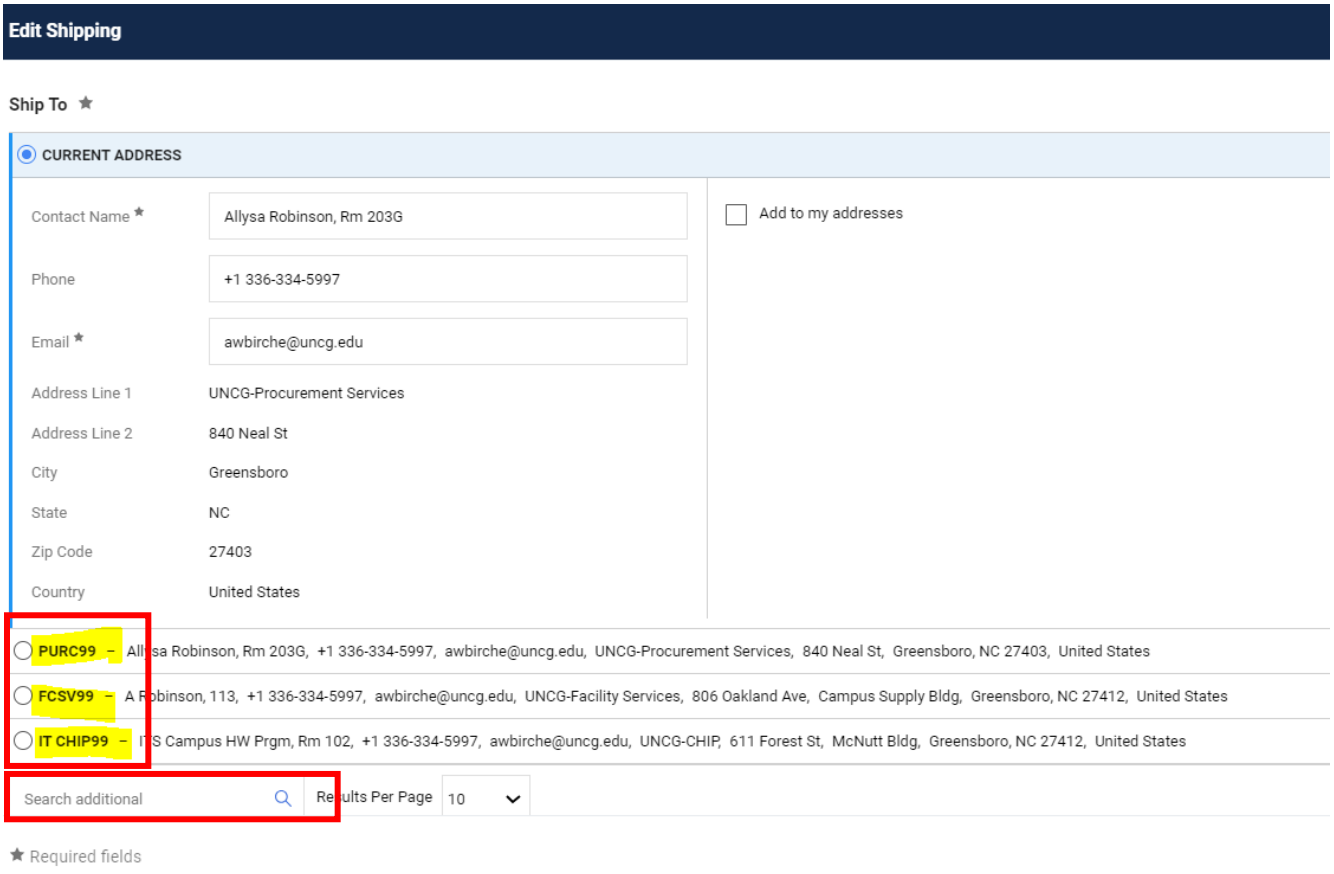
12. Your total should be the same as what it was in the punchout.
    a. Your can Name your cart for easy information to reorder the same items (Optional)
    b. You can create a description if you need to (Optional)
    c. You can pre-approve Freight charges (Optional)
    d. You can not change the QTY's from a punchout order once it becomes a SpartanMart Cart. You would need to delete this cart and start over.
    e. Click Proceed to Checkout
    f. Do not click Assign cart at this step as you will lose the ability to enter accounting code and index(fund) information.



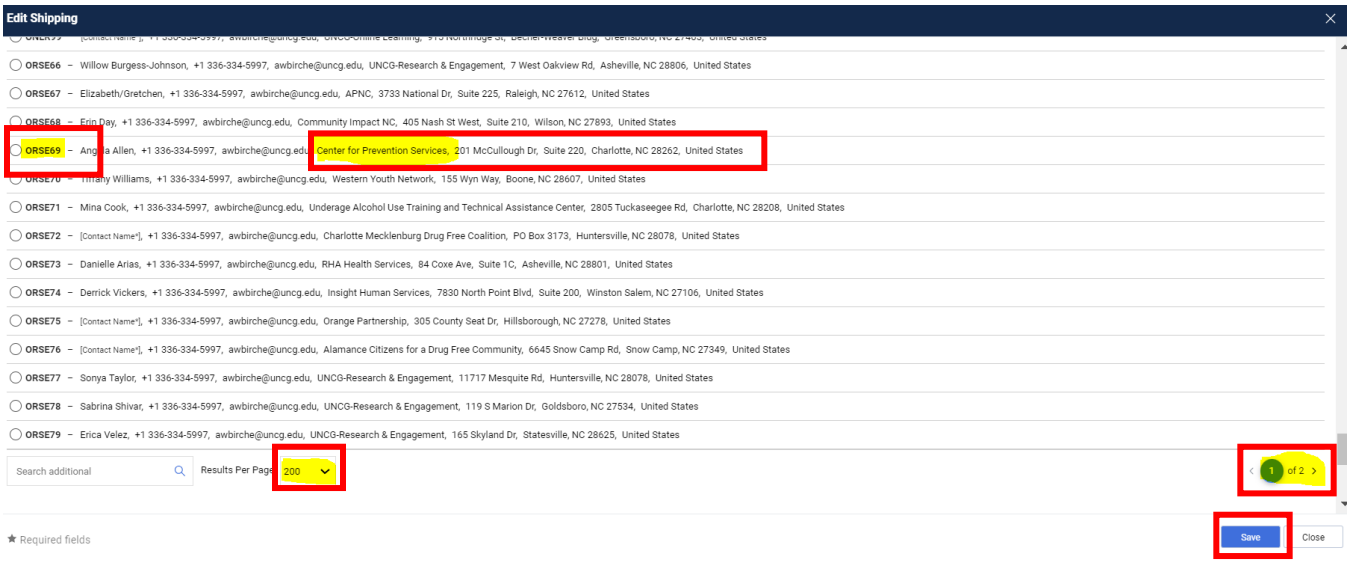
13. Make sure your shipping information is listed here. If not you may need to set up default shipping address on your user Profile. If you need to change this or select a different address Click the Pencil.



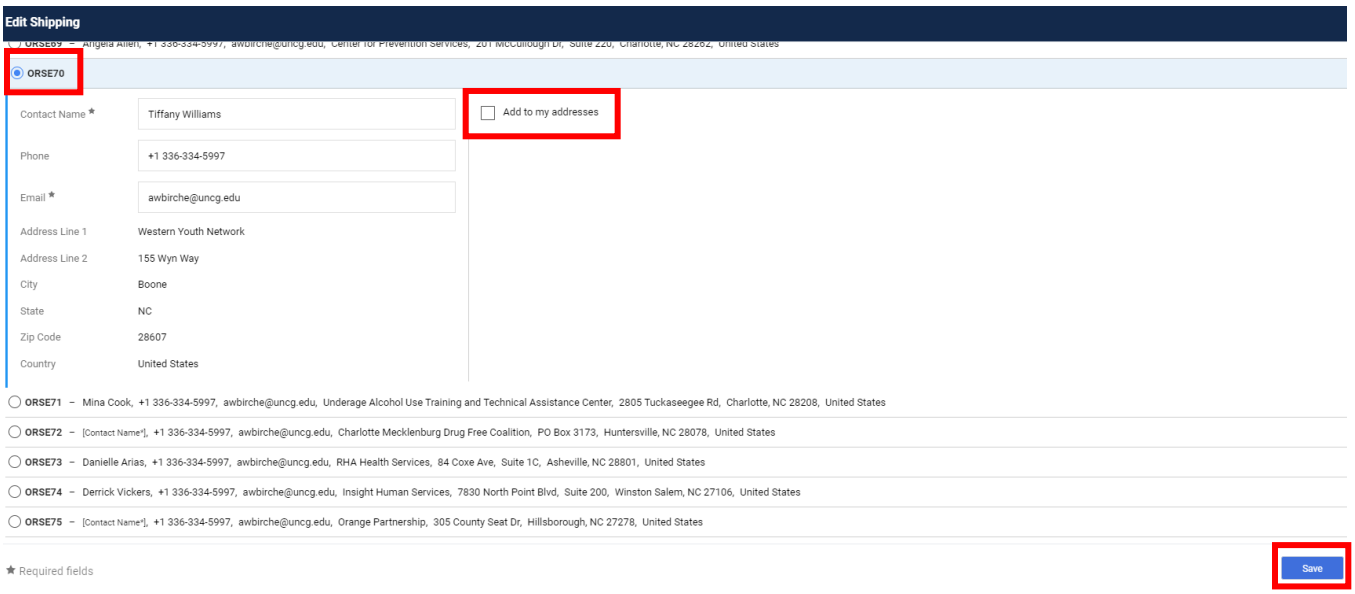
14. Default Shipping information for your profile is available to be selected from here. Or you can search for an address if it is not listed here.



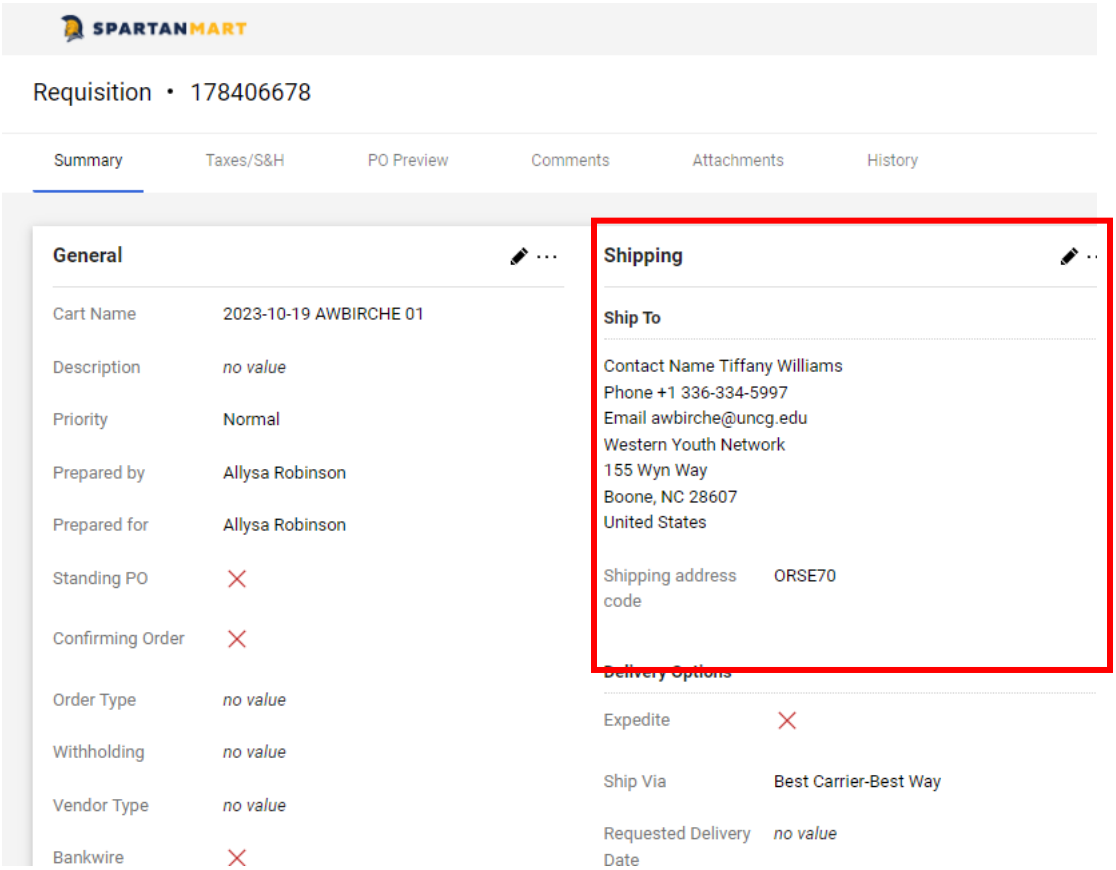
15. If you need to search click the 'magnify glass'. Increase the results per page to see more results. There could be more than 1 page. Type in the department name or building name if you know it to help narrow the search results. Select the one you want by Clicking the circle and then Click 'Save'.



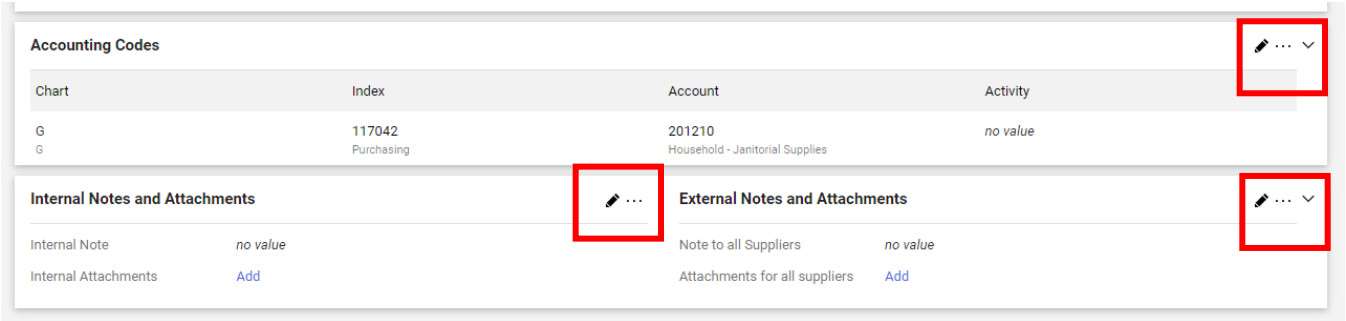
16. You can click' Add to my Addresses' if you want to add this to your profile of shipping address.



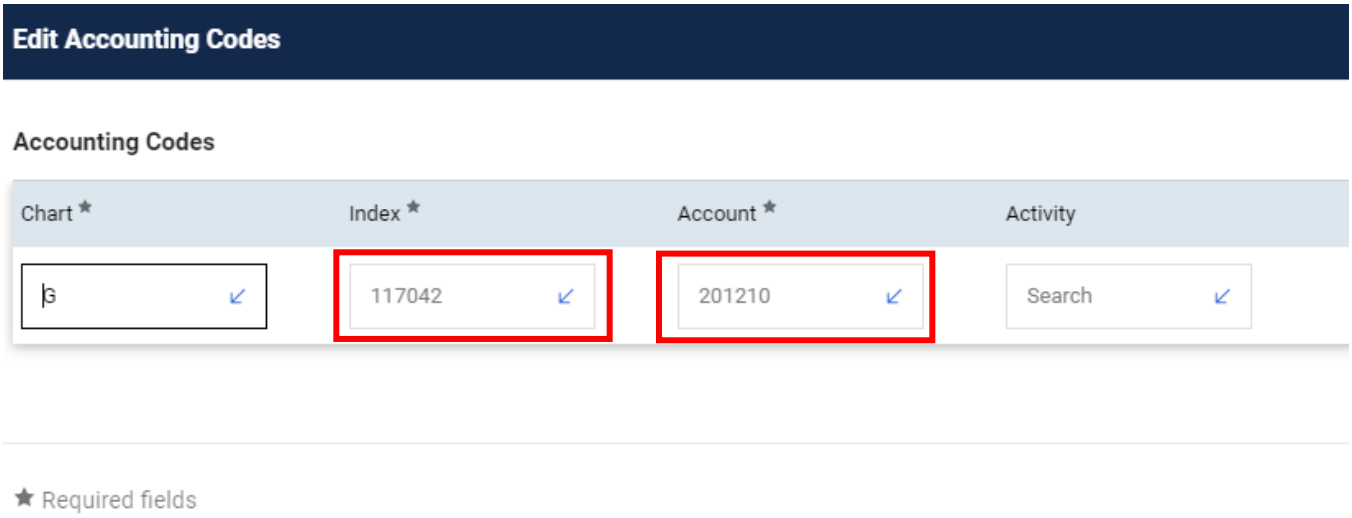
17. The Address should be updated now.



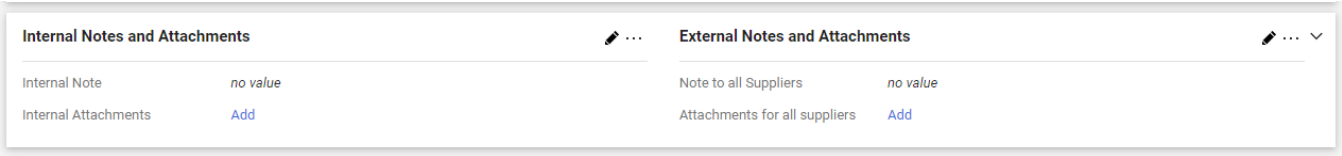
18. Update the Accounting Codes and the Internal/ External Document sections by clicking on the pencils at each area.



19. Accounting Codes Section: the Index # is also known as your Fund#. Click 'Save' when you are done. Use the arrow keys to search for the account #s if needed.

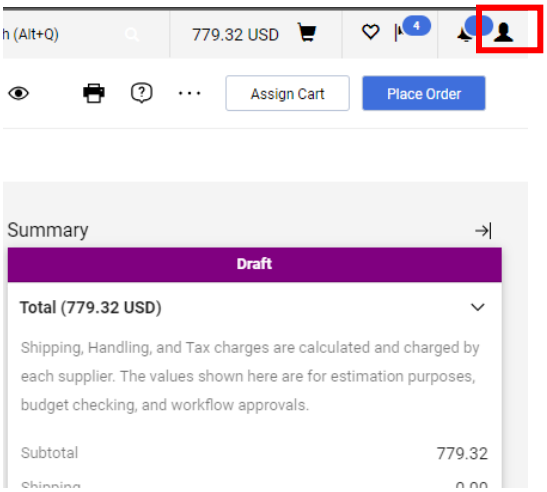


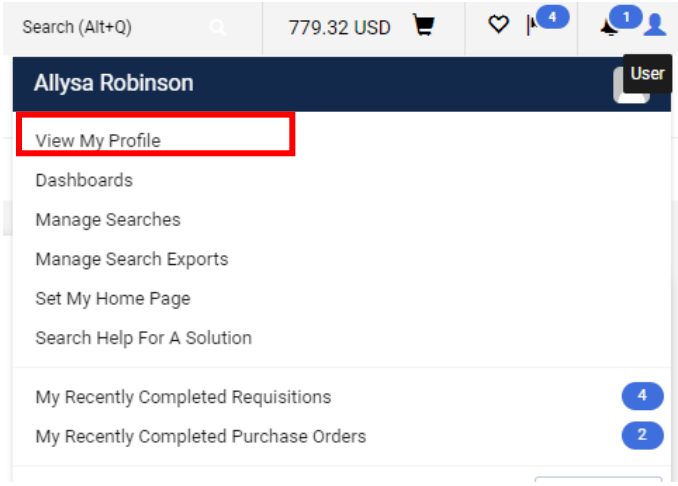
20. Internal Notes and Attachments only UNCG people who have access to this PO in SpartanMart can see this. External Notes can also be seen by the Suppliers. Usually people use the External Notes for additional shipping instructions or to attach a quote.



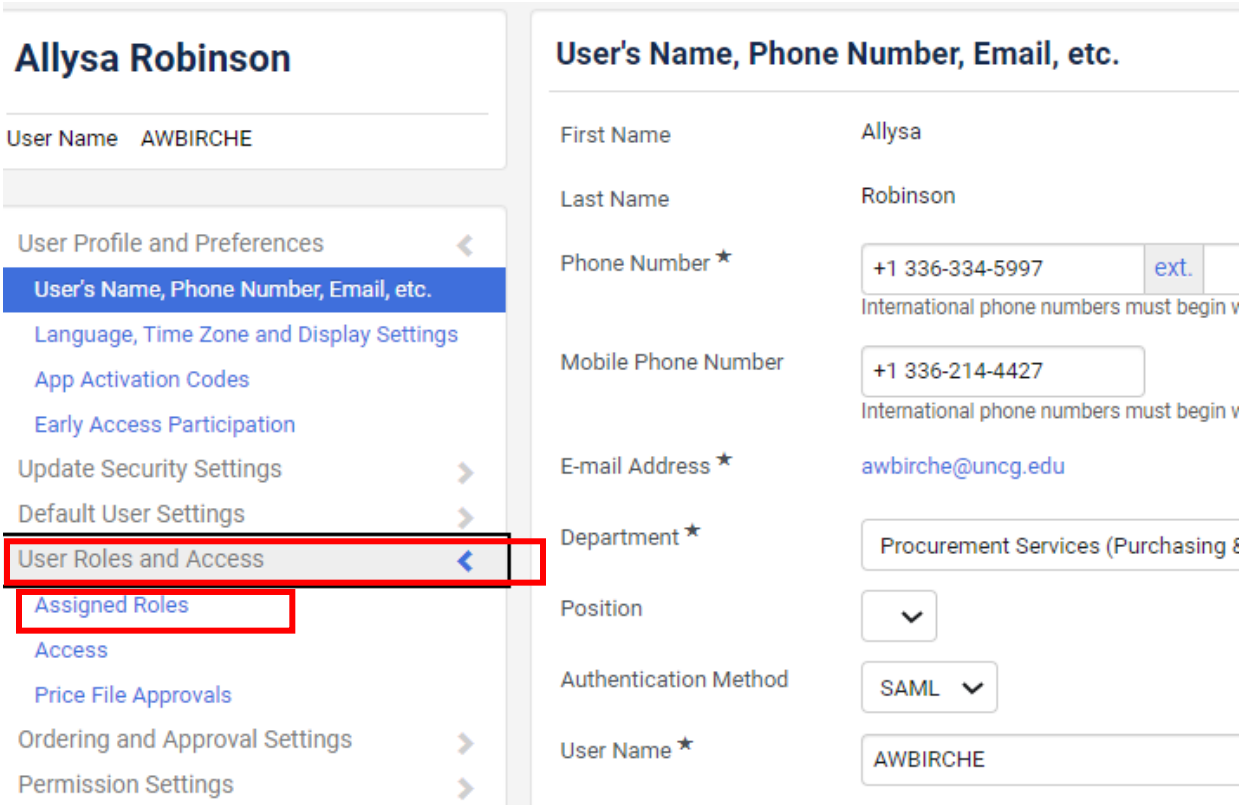
21. If you are done with adding the Shipping info, Accounting Info, Internal & External Notes you are now ready to either Assign Cart or Place order.
    a. All Spartanmart users have the ability to assign the cart to someone with Banner Budget Authority for the Fund#(Index) you listed on the Requisition.
    b. To 'Place the Order' you must be listed as a requestor on your user profile and have Banner Budget Authority for the Fund#(Index) you listed on the Requisition.
    c. **If you are unsure, check before you click Place the order. Your cart will be Automatically rejected/returned if you do not have the permissions to place the order. You will have to start all over if this happens, as Punchout orders can not use the "Copy to new cart" feature.**

22. You can check this by going to your profile. Click the person in the top right corner, then Click ‘View My Profile’.

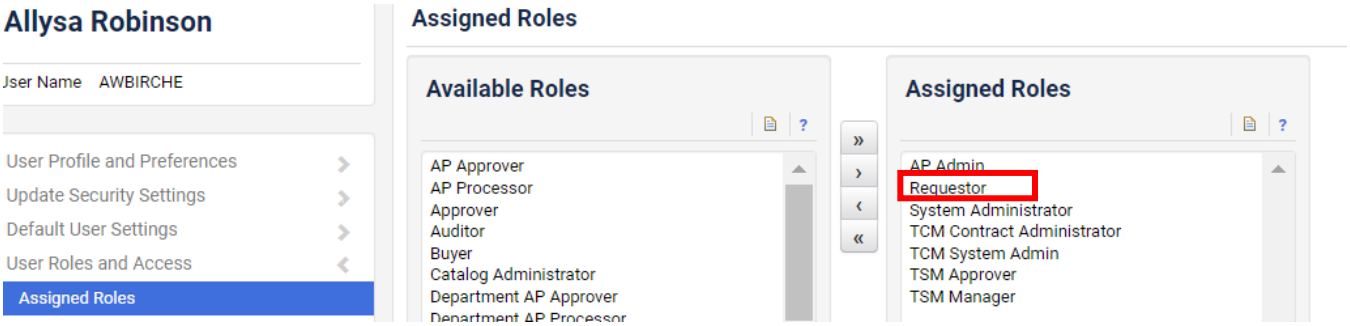




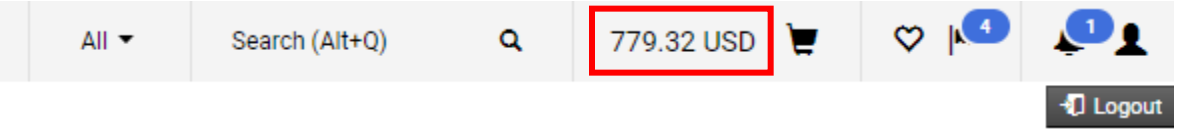
23. Click ‘User Roles and Access’. Click ‘Assigned Roles’.



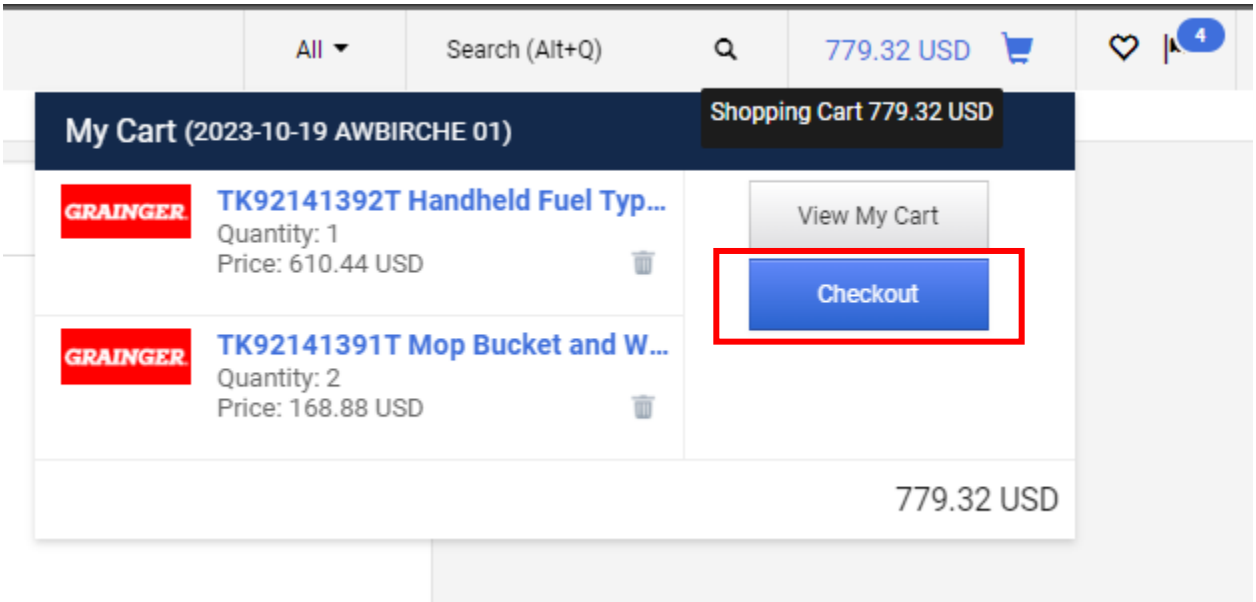
24. You must have the **Requestor** role to Click ‘Place Order’ button. If you do not have this role, then you must Click ‘Assign Cart’.



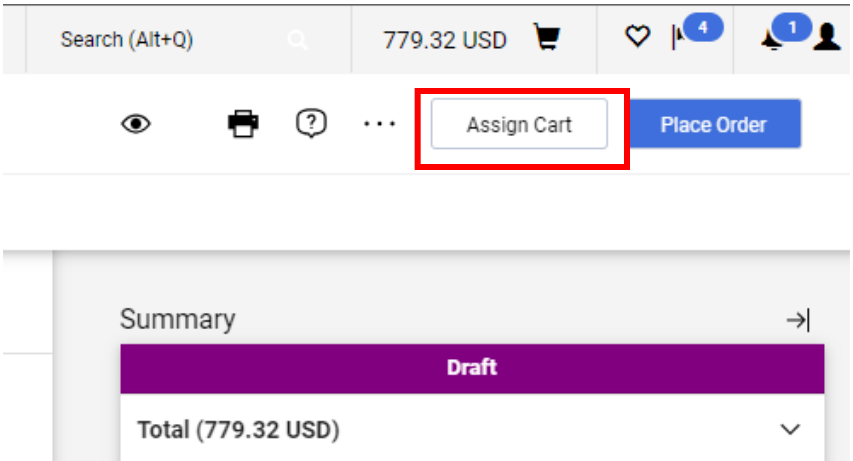
25. To get back to your cart, simply Click the dollar amount on the Top bar.



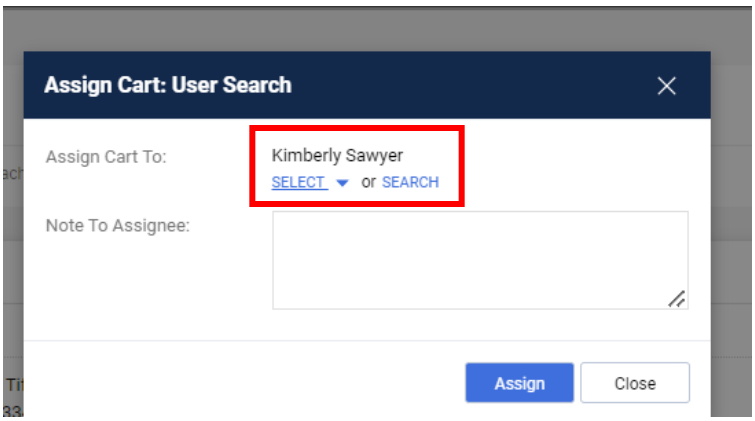
26. Click ' Checkout'.



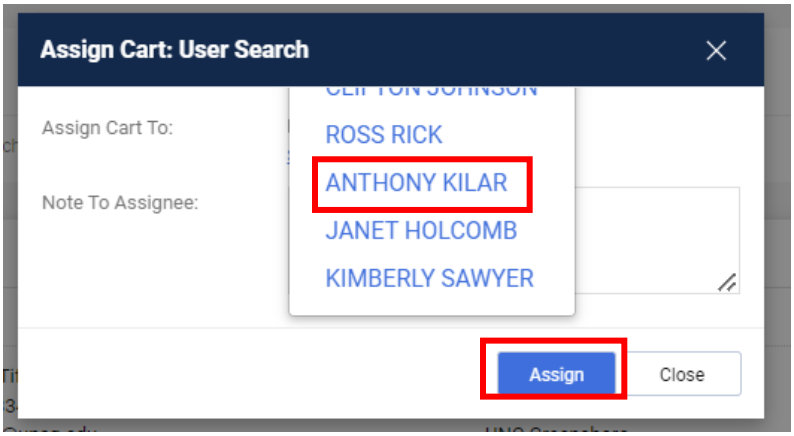
27. Click 'Assign Cart'.



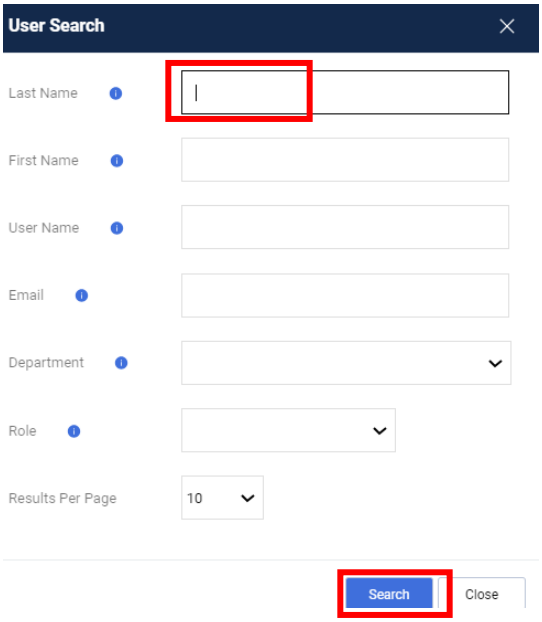
28. Pop up will appear, Click 'Search' or Select if you already have assigned cart people on your profile.

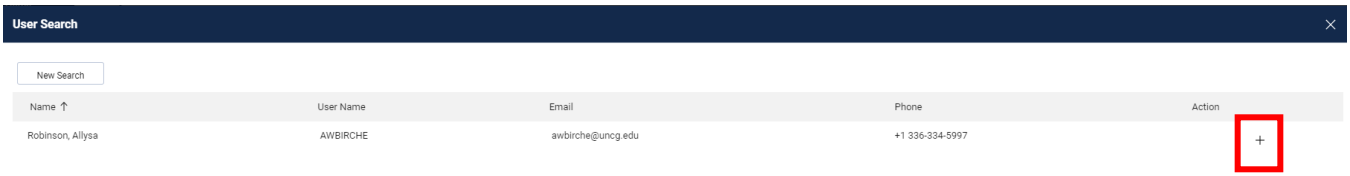


29. If you have people on your profile to assign your cart to Click' Select' Then click that person's name then click 'Assign'. Optional Note section if you need to use it.

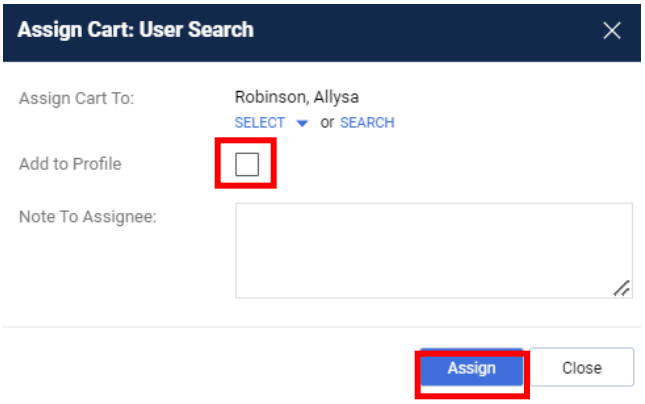


30. This is what the Search box looks like. Its pretty easy to search by last name or email address. You have to click the + sign to select them

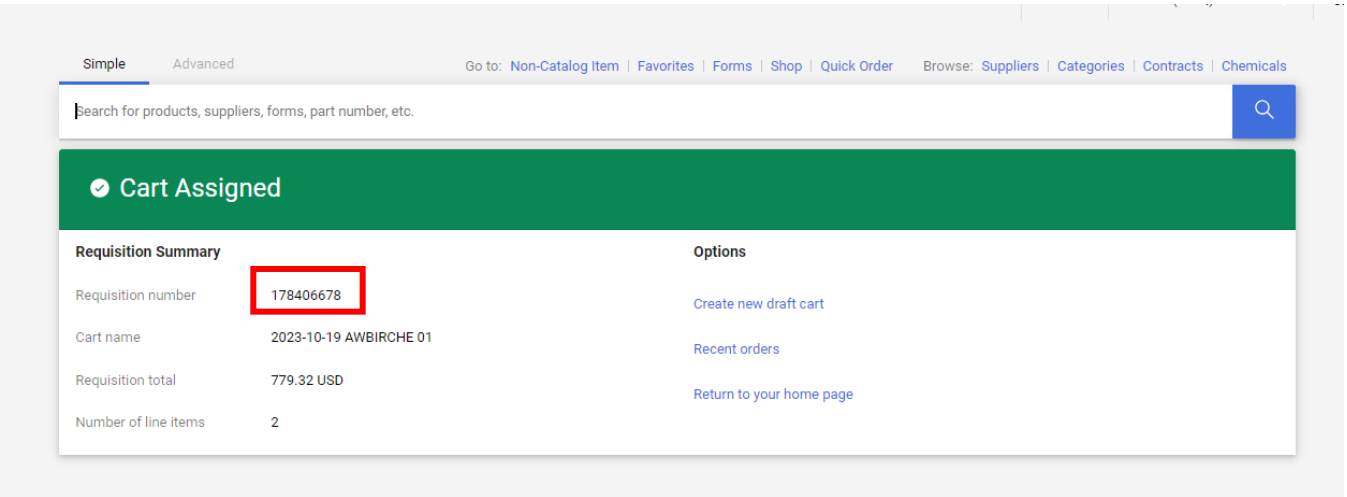




Click box 'Add to Profile' to use that person in the future. Then Click 'Assign'.

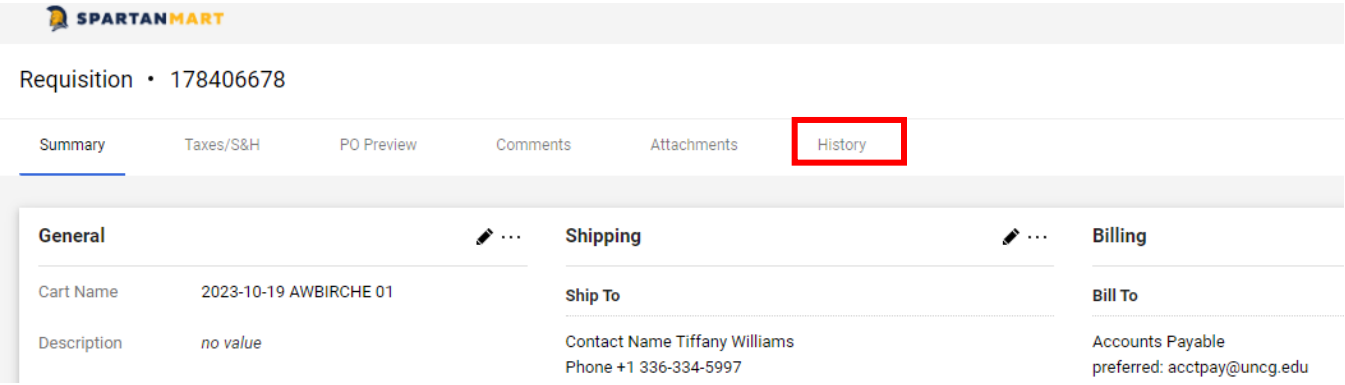


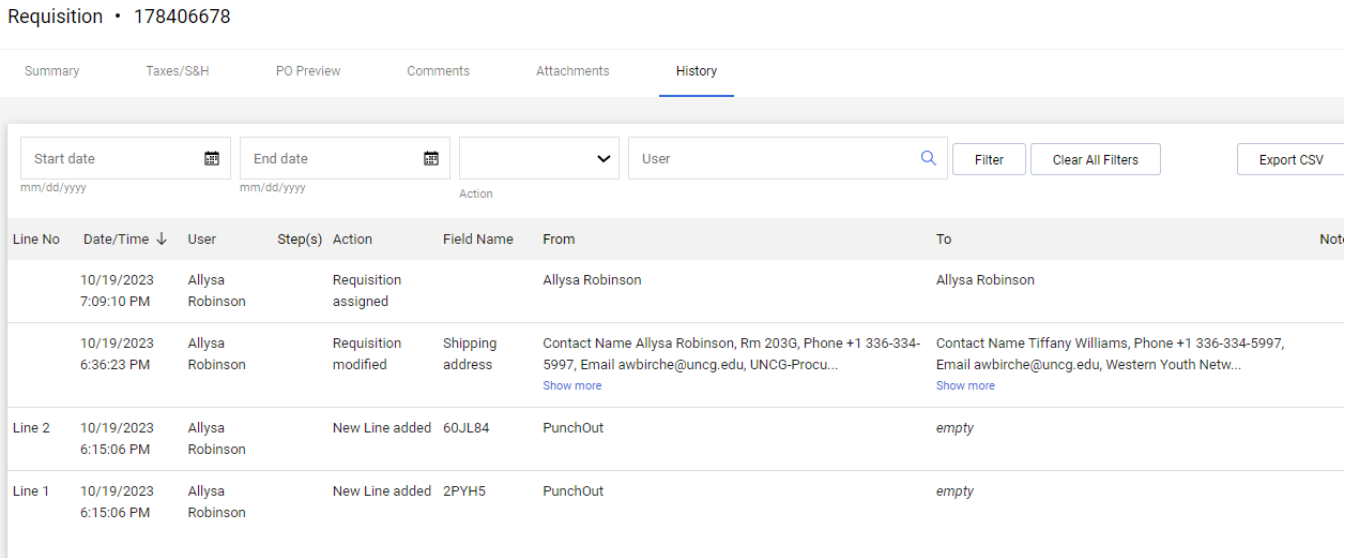
31. You will get a confirmation that your cart was Assigned to someone to process.



As long as that person has notifications turned on for assigned carts they should get a notification or an email from SpartanMart letting them know that they have a cart that has been Assigned to them. They will be person to Click 'Place Order' Once they Click Place Order, the requestion will begin the process into turning into a Purchase order.

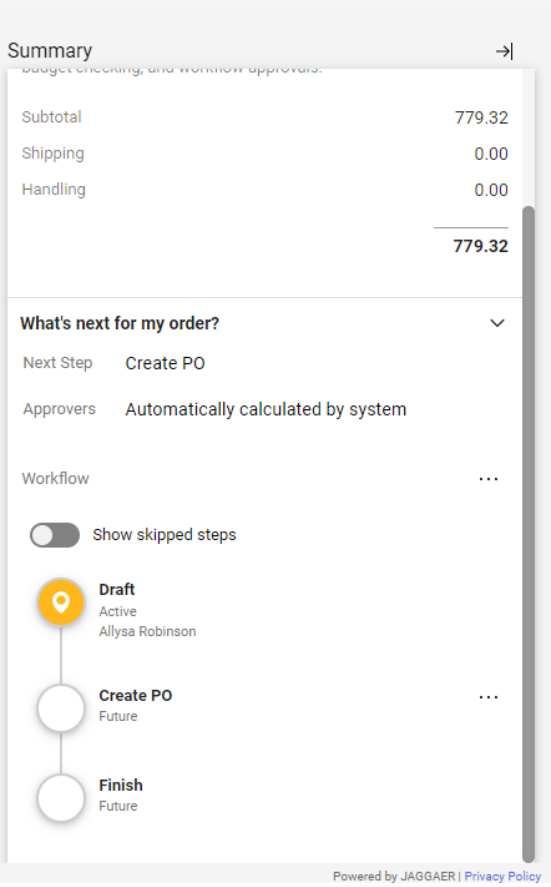
32. You can review this process by going to the requisition and looking in the History to the Workflow areas:
    a. History Tab is very useful if there is an error or something preventing the requisition from becoming a Purchase order.

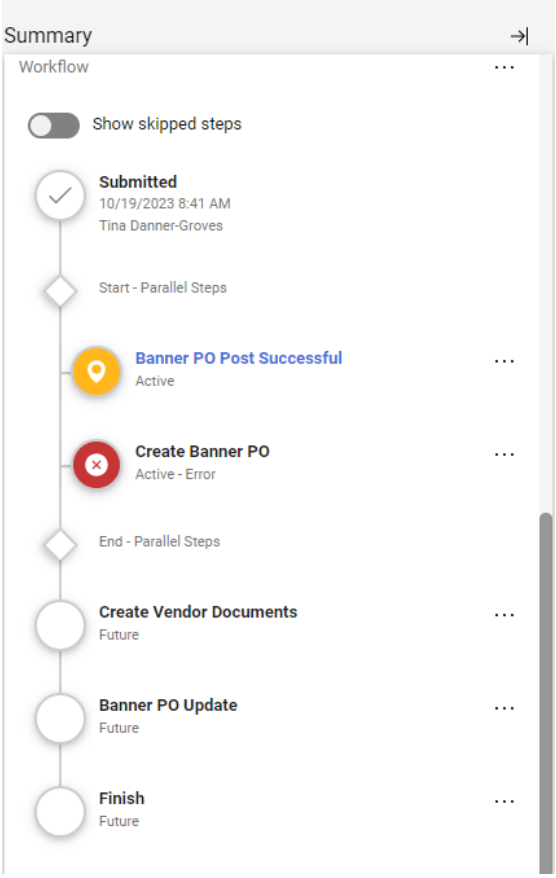




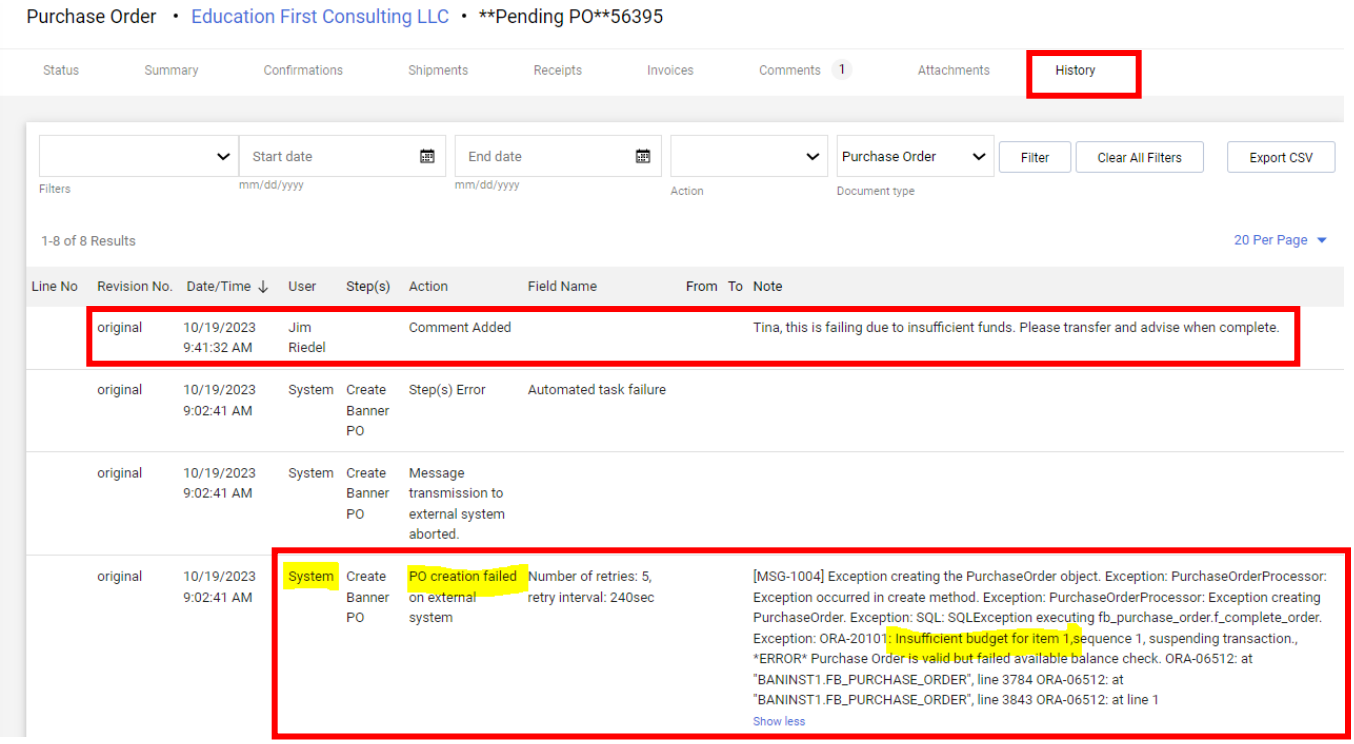
b. The Summary Workflow area will also let you know where the requisition is still at or what approval que it is in. It can also let you know if there is an error or issue.

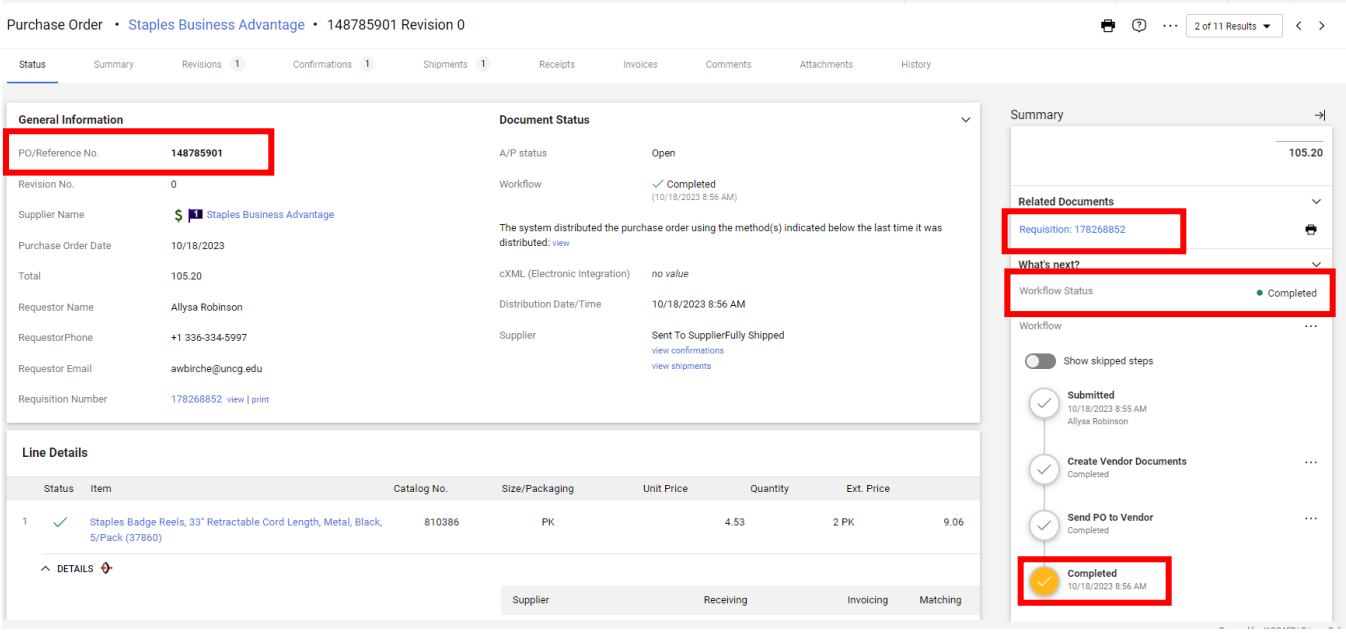
c. Place a comment on the PO if you have a requisition that **has not moved or completed and 24 hours have passed. PO Comment should be sent to the Buyer listed on the PO or purchase@uncg.edu**





Example from the History Tab: PO Failing due to Insufficient budget.



33. If you requisition is successful in becoming a Purchase order this is what it will look like:

a. You will have a PO#, Requisition#, and see a completed status for the workflow Status.