

COLGATE UNIVERSITY

Colgate Unimarket Buyer's Guide

This guide will review how to shop, create requisitions and track your requisitions, orders, and invoices.

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Logging In

1. Open your web browser.
2. Log into [Colgate Portal](#)
[OR](#)
3. In the address field, type <https://colgate.unimarket.com/> (PRODUCTION)
4. Feel free to log into the DEMO site at <https://colgate.unimarket-demo.com/> (DEMO for testing only)
5. The Colgate Unimarket login page will appear.
6. Enter your Colgate University SSO (Single Sign On) username and password and login.
7. Your Colgate Unimarket home page will appear.

If you experience any issues logging in, please contact purchasing@colgate.edu

The Roles in Colgate Unimarket

Your individual profile at Colgate University is managed by Office of Human Resources (humres@colgate.edu) which links to your Banner profile (Banner Form called **FOMPROF**).

In Colgate Unimarket, the two (2) primary roles are: **Browser** and **Buyer**.

Access is determined by your Banner Finance assignment to an OrgUnit. For example, Colgate Athletics (ATHL) contains approximately 85 separate department IDs.

The **Browser** Role in Colgate Unimarket

The Browser role allows anyone to create any “shopping carts” (i.e. requisitions) which are assigned to Buyers to process onwards.

The **Buyer** Role in Colgate Unimarket

The Buyer role in Colgate Unimarket is assigned to those users who have the authority to make purchases using the University's funds based on the Banner FOAPs (i.e. Fund Organization Account Project). Buyers in the Colgate Unimarket eProcurement system have the permissions for the following:

- Access suppliers in the online marketplace created specifically for Colgate
- Search and browse the contracted pricing catalogs from the Colgate suppliers
- Request and receive quotes from preferred suppliers
- Fill an individual shopping cart for checkout
- Accept and process requests from other users (Buyers or Browsers) in the department that do not have FOAP authority
- Create requisitions for purchases against the Colgate FOAP's
- View the status and approval path of requisitions
- View and export reports on purchase orders
- Indicate that the goods or services were received and are approved to pay
- View and track invoices against the purchase orders

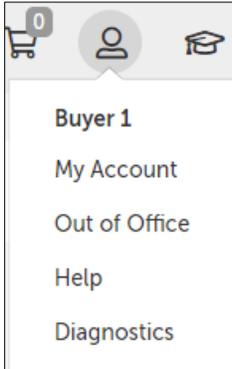
My Account Settings

When you initially log into Colgate Unimarket it is recommended that you check your account details. You can find the My Account page under the silhouette at the top right of the screen. Within the My Account page you can update your preferred first and last name, phone number and email address as well as set your default FOAP. Setting segments of your default FOAP will make the checkout process more efficient if you use the same FOAP segments repeatedly. It is NOT recommended that you set all

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parts of the FOAP as a default, as you may forget to change the Account for different types of purchases. You can also access the online Help provided by Colgate Unimarket in the Help page under the My Account menu.



My Account

User Details Out of Office **Settings**

User Details

Username
ed.maurer33

First Name
Buyer

Last Name
1

Code Phone Ext

Email
ed.maurer@unimarket.com

My Settings

Default Account Code

COAS FUND
C - 100000 - ORGN - ACCT

[Clear Account Code](#) [Load Default Account Code](#)

Key Concepts

- There are two types of suppliers found in Colgate Unimarket:
 - **Catalog (Premium) Supplier** – supplier who has a catalog in the Colgate Unimarket marketplace or provides roundtrip/punchout access to their ecommerce site from Colgate Unimarket.
 - **Non-Catalog Supplier** – supplier who does not have a hosted catalog on Colgate Unimarket or provides roundtrip/punchout access to their site and instead requires products to be manually created in Colgate Unimarket.
- Products to be ordered from a supplier can be accessed in one of two methods:
 -  **Hosted Catalog** – supplier products are “hosted” on the Colgate Unimarket website, meaning you do not leave the Colgate Unimarket website to search and order these products. Hosted Catalogs are identified with the folder icon.
 -  **Roundtrip/Punchout** – supplier products are found on the suppliers’ ecommerce website with a direct link to and from Colgate Unimarket. Roundtrip/Punchout functionality will be identified with the circling arrow icon. A new window or tab will open in your internet browser and you will be signed into the Colgate account on the supplier’s ecommerce site.
 - **Non-Catalog Items** – products requiring information to be entered manually. Even Premium Suppliers could have products that can be entered manually if a product is not found in any of their catalogs.

Searching

Products or Suppliers can be located by searching the loaded catalogs of suppliers using the search options detailed below.

Product Searching

Product searches can be completed using the search function in the title section of Colgate Unimarket. The loaded catalogs, index catalogs (products pointing to a punchout site) or supplier key words can be searched. This search field will also search for supplier names. To search in this method, complete the steps listed below:

1. From the title section, type the product name or key word search term in the search field.



The image shows a search bar with a dropdown menu on the left set to "All" and a search icon on the right. The text inside the search bar is "Search marketplace...".

2. Click **Search**.
3. Any products, supplier names or key words that match the criteria will appear in the search results.

Searching Tips

- Search terms can be combined using the words **AND** and **OR**.
 - **AND** will search for both words/phrases.
 - **OR** will search for one word/phrase or the other.
- Wildcard searches can be performed if the exact search word/phrase is unknown.
 - **?** will replace a single character; i.e. “Te?t” could be Test or Text.
 - ***** will replace multiple characters; i.e. “Test*” could be Tester or Testing.

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Advanced product searching allows the search to be narrowed by Supplier Category, Supplier, or Product Category.

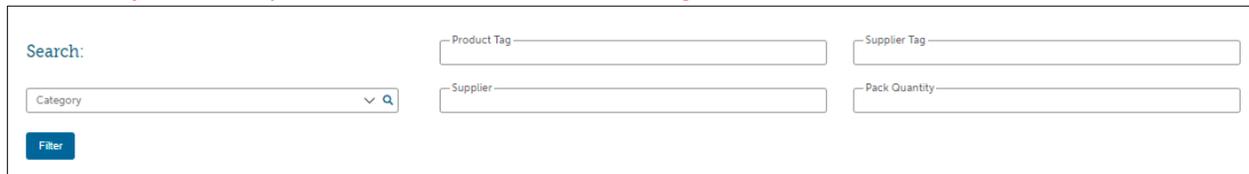
1. Click the magnify glass at the right side of the search bar in the search area. 
2. From the Advanced Product Search window, type the name of the product you are searching for in the Search field.

NOTE: Any field marked with a red asterisk is a required field.

Any time you see a blue question mark, a help bubble will appear when resting your cursor over it.

3. If desired, select a **Tag** or **Supplier** from the drop-down list and/or type in or select a Product Category to narrow your search results.
4. Click **Search**.
5. Any products that match the criteria will appear in the search results.

NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled such as an "Index Catalog".



The image shows a search interface with the following elements:

- A "Search:" label followed by a text input field.
- A "Product Tag" dropdown menu.
- A "Supplier Tag" dropdown menu.
- A "Category" dropdown menu with a magnifying glass icon.
- A "Supplier" dropdown menu.
- A "Pack Quantity" dropdown menu.
- A blue "Filter" button.

Supplier Searching

If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.

- From the Dashboard tab on the menu bar, click on the **Supplier icon** in the Recently Used Suppliers list of the Information Section.
- From the Dashboard, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- Click on the Marketplace drop-down on the menu bar, click **View Suppliers**.

Once you are on the Marketplace page you can search for the supplier by name.

Filling your Shopping Cart

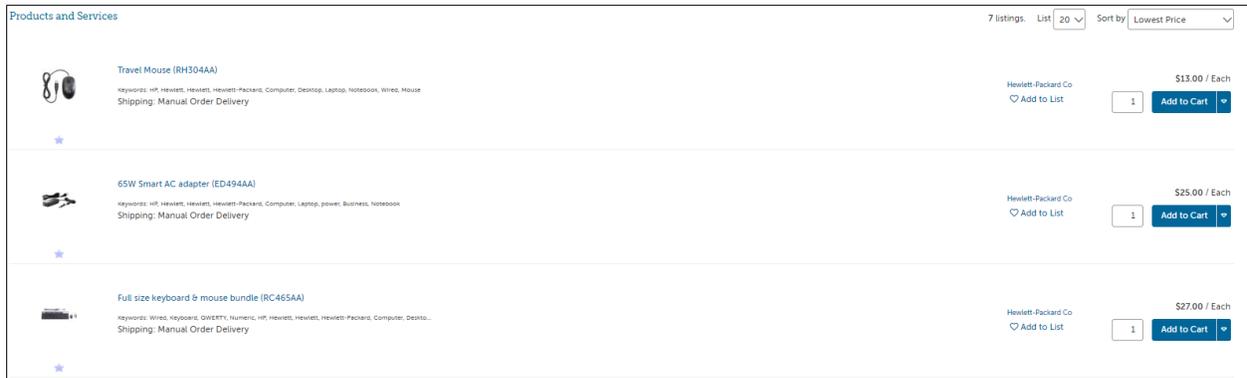
Shopping by Catalog

If a hosted catalog folder icon, appears () after clicking on the supplier name or icon, you will be selecting products from the supplier's hosted catalog on Colgate Unimarket. The supplier may have multiple catalogs that appear.

1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.

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3. Browse items individually or use the search bar to search within the selected catalog.
4. The sort by option defaults to relevant search term Name but can be changed to Code, Lowest Price, or Highest Price.
5. Clicking on the product title or product image will give you more information about the product.
6. When you have decided on a product to order, type the quantity in the Quantity field to the left of the Add to cart button.



7. Click the **Add to cart** button.
8. A confirmation message will appear, and the shopping cart will update to reflect the total number of products.



9. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a circling arrow icon appears (🔄) after clicking on the supplier name or logo, you will be sent to the supplier's website and logged into Colgate's pricing catalog.

1. Click the **supplier** that you wish to shop from the marketplace.



2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.



3. Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.

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4. Add products that you wish to order on the supplier's website by clicking the **Add button**.
NOTE: The terminology of the button to click will vary based on the supplier's website.
5. When finished shopping, click the **Checkout** or **Submit Requisition button** to return to Colgate Unimarket.
NOTE: The terminology of the button to click will vary based on the supplier's website.
6. You will be returned to your shopping cart in Colgate Unimarket with the products you had selected. The additional tab or browser window that opened for the supplier's punchout site should close automatically. If this does not happen, consult your admin or IT support to look at your browser settings.

Shopping with Non-Catalog Items

If a supplier does not provide a catalog, you will need to create a Non-Catalog Item. You will need to enter the product's information in the Non-Catalog form.

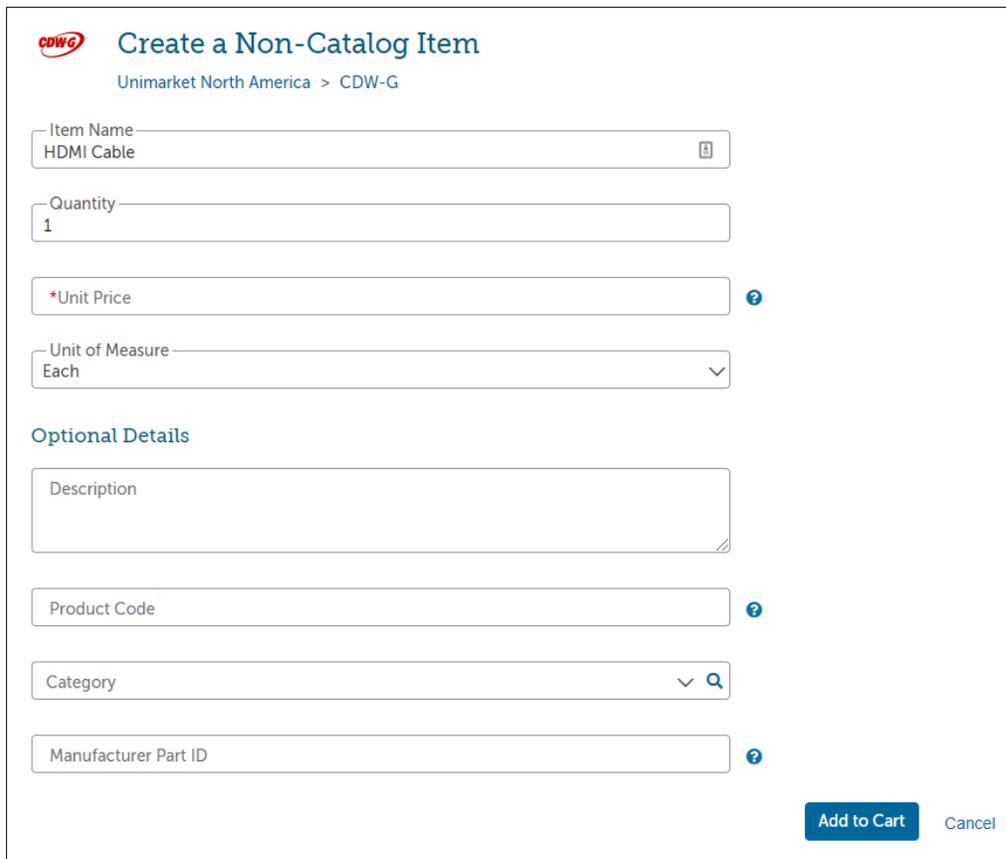
1. Click the **supplier** that you wish to shop.
2. Click the **Create a Non-Catalog Item** link to enter the products details.



3. From the Item Name field, type in the name of the product to be ordered.
4. Click the **Next button**.



5. Any products similar to what you entered that are in a contract pricing catalog will appear on the screen. If one of these products could be ordered instead, type in the quantity and click **Add to Cart**. If the products displayed are not what you need, click **Next** at the bottom of the screen to continue defining the product details.
6. Type in the product information.
NOTE: Fields marked with a red asterisk are required fields
 - a. ***Name** - will be filled in from your previous entry
 - b. ***Unit of Measure** - type in the Unit of Measure or select from the drop-down list. Each (EA) is the most common unit of measure.
 - c. ***Unit Price** – type in the single unit price of the product.
 - d. **Description** – description of product to ensure the supplier knows what you are ordering. The more detail, the better to ensure order accuracy.
 - e. **Product Code** - supplier's product number or SKU.
 - f. **Category** – These are the UNSPSC international standard commodity codes. Type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear.
 - g. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufacture's product.



CDW-G Create a Non-Catalog Item
Unimarket North America > CDW-G

Item Name
HDMI Cable

Quantity
1

*Unit Price

Unit of Measure
Each

Optional Details

Description

Product Code

Category

Manufacturer Part ID

Add to Cart Cancel

7. Next to the Add to cart button, type in the quantity to be ordered.
8. Click the **Add to cart button**.
9. You will be returned to the product screen to enter the next product line and a notification on screen will let you know that the product was added to your cart.

✓ Added item 'HDMI Cable' to your cart.

10. Repeat steps # 3 – 9 for each product line that you wish to order.

Shopping Cart

The shopping cart appears in header bar at the top of the page. The number of products will appear in the cart.

Reviewing the Shopping Cart

1. Click the **shopping cart icon** to view the products that have been added and be taken to your shopping cart.



2. All products in the cart will appear by supplier with an individual supplier total.
3. To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The line item subtotal will update as you go.
4. To remove any product from the cart, click the **red X icon** next to the Quantity field.

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5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right-hand portion of the screen.
6. The **Move** button will allow you to move the product from your cart to a saved or incomplete requisition. From the requisition view, the **Move** button will allow you to move the item to a different requisition or back to your cart.



Product	Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>  Travel Mouse (RH304AA) <small>Keywords: HP, Hewlett, Hewlett-Packard, Computer, Desktop, Laptop, Notebook, Wired, Mouse</small>	1	\$13.00 / Each	\$13.00	Details History
			Supplier Total: \$13.00	Checkout
			Cart Total: \$16.47	Checkout All

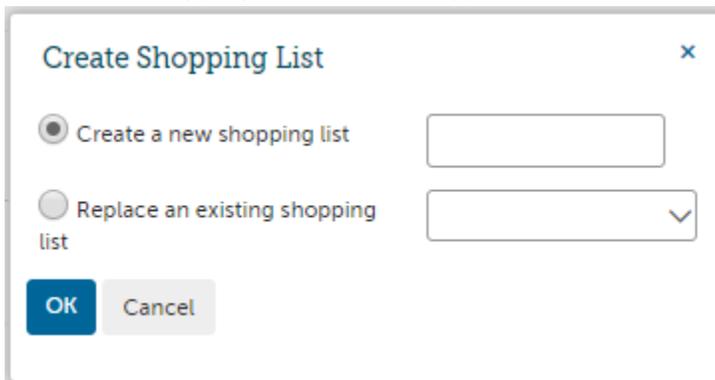
Creating a Shopping List of Frequently Ordered Products

If you have products that you regularly order, you can create a shopping list that can be reused every time you need to order those products. The products to be added to the shopping list need to be in the cart before proceeding. This is a great way to save time when you enter the product(s) manually on a frequent basis.

1. From the cart screen, click the **Create Shopping List**.

[View Shopping Lists](#) [+ Create Shopping List](#) [Clear Shopping Cart](#)

2. The Create Shopping List screen will appear.



3. The radio button for Create a new shopping list will be selected. Type a name for the shopping list in the field to the right.

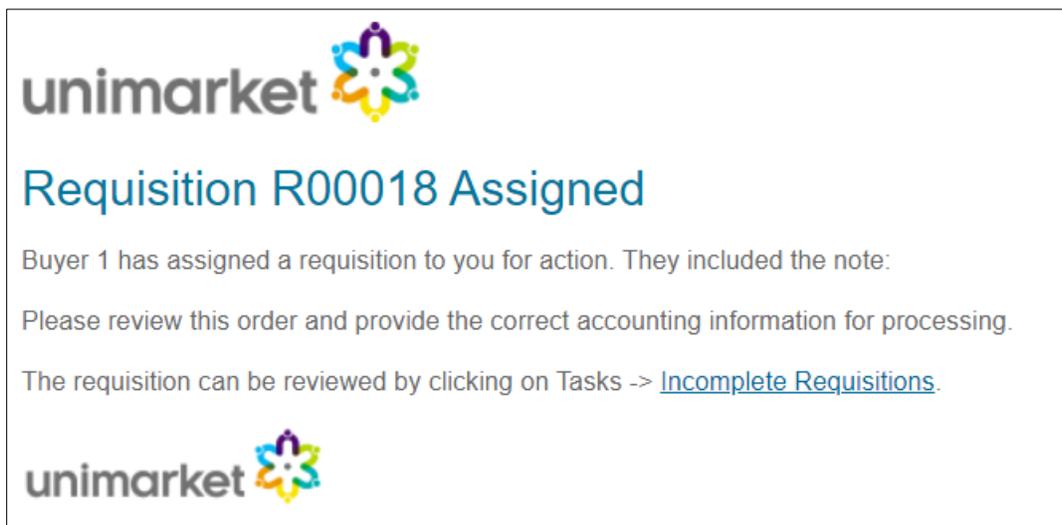
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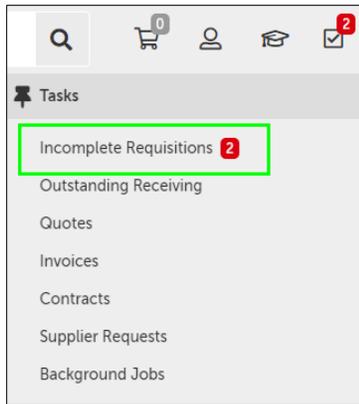
4. If a shopping list has already been created and needs to be changed, select **Replace an existing shopping list** and select the shopping list from the available options.
5. Click **OK**.
6. Once a shopping list has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Shopping Lists**. The following options are available:
 - a. **Add selected to Cart** – select the products you want from the shopping list and click **Add selected to Cart** to add the products to your cart.
NOTE: Doing so will replace anything that is currently in the cart.
 - b. **Share Shopping List** – allows the user to share the shopping list they created with other organization units.
 - c. **Delete Shopping List** – click **Delete Shopping List** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.
NOTE: When you use a Shopping List, the products will replace any current products that you have in your shopping cart.

Incomplete Requisitions from Browsers

The users in your department that do not have FUND/ORGN authority will be able to shop and reassign their incomplete requisitions to you as the Buyer. As the Buyer, you will be alerted by email from purchasing@Colgate.edu when an incomplete requisition has been assigned to you. See example email alert below.



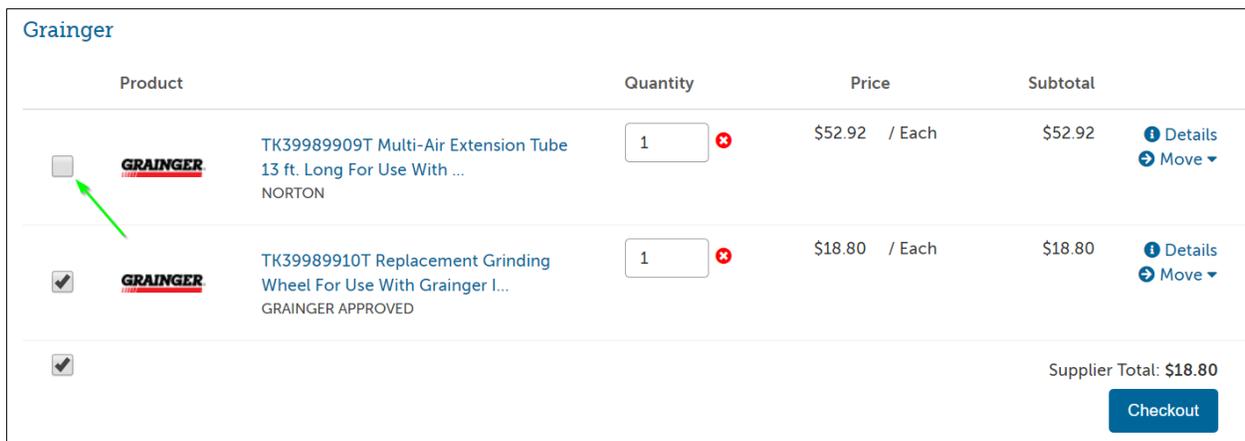
To find and process this incomplete requisition, go to the Tasks menu and Incomplete Requisitions.



In the Incomplete Requisitions page, you will see all requisitions that have been assigned to you for completion. Click the requisition number to open and review the details or click Checkout to begin the checkout for completion of the requisition and routing for approval.

Creating a Requisition

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on to the checkout screen. If you do not wish to order a product yet but don't want to delete it from the shopping cart, click the **checkbox** to remove the check.



2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier.



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Locations

The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in Colgate Unimarket. If you select another location and complete the checkout, your selection will be your new default for your next checkout process. You can type the first letter of the location to navigate the dropdown list easily. **Due to COVID-19**, Colgate restricted “desktop” delivery and did not disable the ability to manually change the address to a work remote location. As such, it is advised that you select from the twelve (12) primary ship-to locations and then alter the Attention To: field with specific End User name, Building name, mailing address, and Room number so deliveries may occur seamlessly.

Attn Field:

The Attention To field (Attn) is very important in your checkout process to ensure the accuracy of the delivery by the supplier. The most pertinent information for delivery should be first (left to right) in the "Attention To" field - i.e. lab or room # / Recipient last name / phone extension.

NOTE: The Attention To field (Attn) has a 35-character limit. As such, the building, room number, and name (first initial, last name) needs to be filled in as follows: **E.G. “Ho Science 331 J Smith”**

Example:

Ship To	Annapolis Office	▼
Attn	Buyer 1	
Unimarket NA Inc. [UM] 111 Cathedral St Suite 203 Annapolis, MD 21401 United States		

Bill To	Accounts	▼	Ship To	Annapolis Office	▼
Attn:Accounts Payable	Unimarket NA Inc. [UMAP] 111 Cathedral St Suite 203 Annapolis, MD 21401 United States		Attn	Buyer 1	
			Unimarket NA Inc. [UM] 111 Cathedral St Suite 203 Annapolis, MD 21401 United States		

Checkout Items

The products or services that you selected from the shopping cart will be listed as separate lines in your checkout items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may remove the line items from the checkout screen using the buttons to the right of the products.

3. Use the Account fields to enter the value of the required FOAP fields.
 - a. If you have set any segment of your FOAP string in your "My Profile Settings" page, these fields will auto populate in every checkout instance. It is not recommended that you default the Account field as that should change for each type of purchase that you are processing.
 - b. You can begin typing the number or description of the FOAP element value and a dynamic list will appear to be chosen from.
 - c. Use the magnifying glass to open a search window if you have trouble finding the FOAP element that you are trying to allocate for the line item.
 - d. You can use the Copy Down button to repeat your selected accounts to each line below.



4. Delivery Date
 - a. Delivery Date is an optional field on the line item that can be filled in as a suggested or preferred delivery date to the vendor. For critical deliveries, please follow up with the supplier directly to confirm the delivery date.

Product	Delivery date
 HDMI Cable	<input type="text" value="Pick a date"/> <input type="text" value="12:00 PM"/> 
COAS C	FUND 100000
ORGN	ACCT
	...

Notes and Attachments

5. Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.
 - a. The Justification Notes and Attachment are for internal justification use and will not be sent to the supplier. The Justification Notes will always be on the requisition and not carried over to the Purchase Order.
 - b. The Delivery Notes and Order Attachments are for sending information to the supplier and will be sent to the supplier with the final PO.

NOTE: If a different address is needed for delivery, alert the system administrators in Purchasing so they can add the new location to the prepopulated list. Adding a different address in the delivery notes will not guarantee that the order is delivered to that address.
 - c. You can attach as many documents as needed with a single file size limit of 50 megabytes
 - d. You can also attach a file in the Order Attachments and **chose not** to send it to the supplier.

The screenshot shows a checkout form with several sections:

- Delivery notes:** A text input field.
- Blanket order:** A dropdown menu.
- Financial year:** A dropdown menu with "FY20" selected.
- Justification:** A text input field.
- Justification Type:** A dropdown menu.
- Requisition Type:** A dropdown menu with an asterisk indicating it is required.
- Order attachments:** A section with a "Drop files to attach, or browse" button and a "Size limit 50MB" note.
- Justification Attachments:** A section with a "Drop files to attach, or browse" button and a "Size limit 50MB" note.

A blue banner message states: "The justification and attachments are for review by the approver. They will not be sent to the supplier."

Organization Selection

Under the Justification Notes section of the checkout screen will be an Organization section. This section is for visibility and receiving capabilities across your organization to the supervisors and other users.

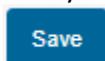
The screenshot shows the Organization Selection section with the following details:

- Organization:** Financial Administration
- Organization Unit:** Financial Administration (with a close 'x' and dropdown arrow icon)
- Description:** This is the organization unit you are making the purchase for. It is used to group transactions by organization unit.

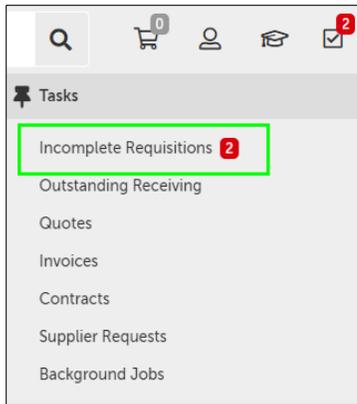
6. Select the Organization that is appropriate for your purchase. This will most likely match the FOAP selected for your line items. Selecting the correct Organization unit will allow others in your organization to view and perform any necessary receiving actions for this purchase order. You may only have one selection available to you, or you may have many depending on your organizations structure.

Saving a Checkout

7. If you need to enter more information and must come back to the checkout screen, you can Save your checkout progress.



This will create an Incomplete Requisition that can be seen in the Task Menu.



1. Once your checkout screen is complete with all the needed information, click Checkout.

Checkout

Reassigning your cart

1. If you need to send this requisition to another buyer for more information or to complete the requisition and process for approval routing, click **Reassign**.

Reassign

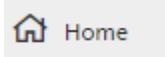
2. A popup will prompt you to reassign your requisition to a Buyer. You can also include any important notes to the Buyer here.

A confirmation message will appear stating that the items have been forwarded to the designated individual. The Buyer will receive an email notification and the Incomplete Requisition will appear in the Tasks Menu for the Buyer to complete the requisition and route for approval. You can see the incomplete requisition status if you look at the View Requisitions page.

Tracking Requisitions

After you successfully create a requisition you will be able to monitor the progress from your Dashboard on Colgate Unimarket or from the Requisitions page under the Orders menu.

1. Click the Home button.



2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

Requisitions in Progress			
CDW-G	R00016	6/5/2020 4:34 PM	\$1.00
View requisitions			

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all your requisition.
 - a. The View Requisitions screen will appear.
 - b. You can see the header level requisition information as well as the current approver(s).
 - c. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and then click the **Search button**.
 - i. **Requisition Number**
 - ii. **Supplier**
 - iii. **Created Date**
 - iv. **State**
 - v. **Buyer**
 - vi. **Organization Unit**
 - d. To select a requisition, click on the **Requisition number** from the list.
5. To view the approval status of the requisition, click on the Approvals tab. You will see the approvals that have happened, who the requisition is with now for approval and the next approval steps needed before the order is created.

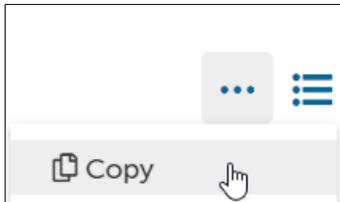
Items	Approvals	Comments (1)	History
Approval Process Instance: 2. Current			
Delegated Approval: US Operations (US Operations)			In Progress
Approver	Created Date	Completed Date	Level
Approver 1	6/5/2020 4:38 PM		Clearing Authority (\$999,999.00)
			In Progress

6. The various approval statuses include:
 - a. **Approved** - approved and advanced to the next level to an order
 - b. **Declined** – was not approved and sent back to buyer
 - i. Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition
 - c. **Escalated** – skipped an individual to advance to next level
 - d. **In Progress** - current level of approval
7. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email with the purchase order number and details of the purchase order will be sent to the buyer and the originator of the requisition confirming that the order was sent to the supplier.

Reprocessing a Declined Requisition

If your requisition is declined for any reason you will receive an email notification with the requisition number and details along with any notes that the declining approver provided. Reprocessing a declined requisition is easy. Follow the below steps to **Copy and resubmit the requisition with changes**.

1. Click the link to view the declined requisition from declined email notification or go to View Requisitions and search by Declined in the state search filter.
2. At the top right of the requisition view page, under the Actions menu, you will see the option to Copy the requisition.



3. When you copy the requisition, all information including the notes and attachments will be copied into a new Incomplete Requisition for you to edit and resubmit.
4. When you Copy, you will be taken directly to the Incomplete Requisition. Make any needed edits to the copied requisition and click Checkout to create the new requisition and route it for approval.
5. The new requisition will have a new number but will have a link and reference to the old requisition for historical information.

Viewing Order

1. Orders that have been created can be viewed in the Orders area of the information section of the Dashboard or from the Order menu and View Orders page.

Orders			
CDW-G	EP00018	6/5/2020 4:35 PM	\$1.00

[View orders](#)

2. If the order is visible, click on the **order** from the list.
3. If the order is not visible, click **View all orders** to see all your orders.
 - a. The View Orders screen will appear.
 - b. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and then click the **Search button**.
 - i. **Order Number**
 - ii. **Supplier**
 - iii. **Created Date**
 - iv. **Order Type**
 - v. **Buyer**
 - vi. **Receiving Status**
 - vii. **If the Order has been invoiced or not**
 - viii. **Organization Unit**

Colgate Unimarket Buyer's Guide

Colgate University

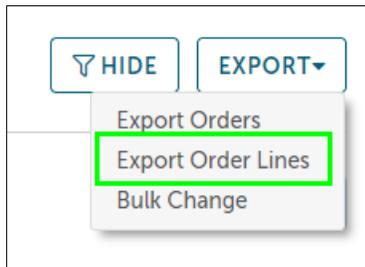
- c. To select an order, click on the **Order number** from the list.

The screenshot shows the 'Orders' page with various filters and a table of order data. The filters include Order Number, Created Date (Last 90 Days), Supplier, Order Type, Buyer, Receiving, Has Accepted Invoice, Organization Unit, Order State, Payment Method, and Views. An 'APPLY FILTER' button is present. The table below shows a single order entry.

Order	Receiving	Type	Buyer	Requisition	Supplier	Order Date	Total
EP00018	Open	Standard	Buyer 1	15	CDW-G	6/5/2020 4:35 PM	\$1.00

Exporting Order Reports

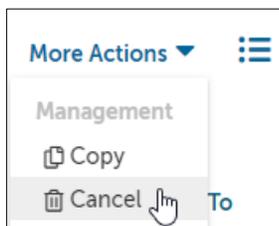
1. From the View Orders page, you can use the down arrow on the search button to Export the current search results into an excel spread sheet with the header level report or an export of the line item detail.



OrderNumber	OrderType	PaymentMethod	PaymentStatus	RetrofitOrder	CreatedDate	OrderDate	OrderState	ReceivingState	HasAcceptedInvoice	RequisitionNumber	BlanketOrder	Organisation
XU000042	Standard	On Account		FALSE	4/2/2020 15:51	4/2/2020 15:51	Open	Open	FALSE	R0000046		Xavier University
XU000042	Standard	On Account		FALSE	4/2/2020 15:51	4/2/2020 15:51	Open	Open	FALSE	R0000046		Xavier University
XU000041	Standard	On Account		FALSE	4/2/2020 15:50	4/2/2020 15:50	Open	Open	FALSE	R0000045		Xavier University
XU000040	Standard	On Account		FALSE	4/2/2020 15:48	4/2/2020 15:48	Open	Open	FALSE	R0000027		Xavier University
XU000039	Standard	On Account		FALSE	4/2/2020 9:47	4/2/2020 9:47	Open	Open	FALSE	R0000044		Xavier University
XU000039	Standard	On Account		FALSE	4/2/2020 9:47	4/2/2020 9:47	Open	Open	FALSE	R0000044		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University
XU000038	Standard	On Account		FALSE	4/2/2020 9:16	4/2/2020 9:16	Open	Open	FALSE	R0000043		Xavier University

Canceling an Order

An order can only be canceled if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration (🔒) can disable the ability to have a canceled order since they are processing the orders as quickly as possible. If an order needs to be canceled, contact the supplier to cancel the order or return the order once received. This would be the supplier's preferred process if they have disabled the ability to cancel an order in Colgate Unimarket.



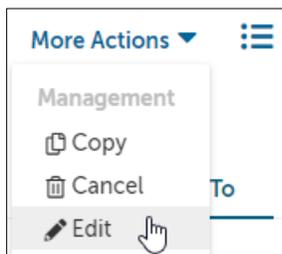
To cancel an order that has not been received against or invoiced:

1. Locate and view the order from the View Orders screen
2. Select Cancel from the Action options in the top right
3. Confirm that you want to cancel the order

The supplier will be notified via email that the order has been cancelled and you as the buyer will be CC'd for any added discussion through a reply all email. The order will also be canceled in Banner and the encumbered funds released.

Changing an Order

An order can only be changed if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration (🔗) can disable the ability to have change orders done since they are processing the orders as quickly as they can. If an order needs to be changed, contact the supplier to cancel the order and/or create a new order and return the initial order once received. This would be the supplier's preferred process if they have disabled the ability to change an order in Colgate Unimarket.



To change an existing order that **has not been received against or invoiced**:

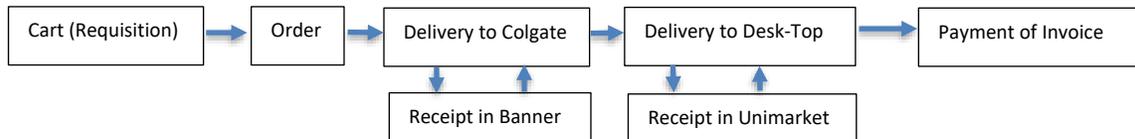
1. Locate and view the order from the View Orders page and select Edit in the Action items at the top right of the page.
2. A new incomplete requisition will be created with the original order details and will be placed into the checkout.
3. The original order details will be copied and can be modified as required from within the checkout screen. This includes Quantity, FOAP, Billing and Shipping addresses as well as other related information like notes and attachments.
4. Once you have the desired changes made, click Checkout.

The modified order will be routed for approval again IF the FOAP codes changed or the total value of the order is higher than the original. If the modifications to the order do not change the FOAP or increase the value, the changed order will be created with a new order number referencing the original order as a Change Of Order.

Once approved, a new order will be generated and sent to the supplier with a reference to the changed order. The Change Of Order link will provide an audit trail for the previous order. The original order will be canceled with a notification to the supplier and cancellation in Banner to release the funds.

Receiving

Once an order is placed, the supplier fulfills the order, with an order acknowledgement (optional). Once the item arrives in the pre-determined Colgate Ship-To Locations (IE – primarily C/R = Central Receiving [134 Broad Street], HoSci – Ho Science Center (EHS), or COOP – O'Connor Student Center Mail Room) with specific Building and Room numbers in the ATTN to field, the Buyer must “receive” each line item or all line items within Colgate Unimarket. See below:



An order can only be changed if the order has not been invoiced or marked as having any receiving history. Some suppliers with Order Integration (🔗) can disable the ability to have change orders done since they are processing the orders

Colgate Unimarket Phase 1: Early Adopter Training

Logging in:

- Feel free to log into the DEMO site at <https://colgate.unimarket-demo.com/>
- Feel free to log into the live PROD site at <https://colgate.unimarket.com/>
Once Colgate Unimarket has launched campus-wide, this PROD link will be found on the Colgate Portal, just as Staples and Grainger are currently located.
- Colgate Unimarket is single sign-on (SSO), so your Colgate credentials allow you to log on to both the demo and live Unimarket sites.

Placing an order:

- When you log in to Colgate Unimarket, a dashboard with available suppliers (such as Staples, Amazon, and Grainger) will be shown (as "Catalog" suppliers).
- Click on the supplier that you wish to make a purchase with (i.e. called "punching out")
- This brings you to the page where you decide the type of purchase you want to make. In general, you will click "'Vendor' for Colgate University." Clicking on this will bring you to the integrated web site storefront.
- Once you click on "'Vendor' for Colgate University," you can shop and add items to your cart as you normally would. All products are available and you are automatically logged into Colgate's account.
- Once you have added all necessary products to your cart, click **checkout**.
- Verify that you have what you want/need in the cart and checkout. This will redirect you back into Colgate Unimarket.
- Verify that all items and quantities came over and click **checkout**.
- Here you will fill in the following fields:
 - Shipping destination
 - Staples - Desktop delivery
 - In the ATTN: field you must enter your name, building, and room number.
 - Chemicals/HazMat - EHS
 - General items - Central Receiving
 - In the ATTN: field you must enter your name, building, and room number.
 - Organization
 - Many buyers can purchase on behalf of others (i.e. Molly Ogden in Purchasing ordering on behalf of Lora Valentine in Accounting)
 - Accounting
 - Under each item there is an area that is entitled COAS in small letters. Here you enter the budget code in the following format: Fund-Org-Acct. If your budget code is unrestricted, you must put 100000 in the fund (i.e. 100000-54030-299).
 - If you're ordering from a fund or grant, enter the 6 digit fund number and tab over, the org will default in for you or you can click on the magnifying glass which will show the valid org for that fund.
 - You can either copy the budget code down to all items with the button that has a down arrow and three horizontal lines or you can split the accounting for the item using the 'y' shaped button.
 - Delivery notes
 - This is where you would put your room number for Staples and Spring Valley (desktop delivery)
 - Justification
 - Here you add in justification for larger purchases or if you have any supporting documentation (i.e. quotes).
 - Checkout
 - Click checkout to complete the order
 - Click reassign to send to another staff member
 - Click save if you need to come back to the order at a later time.
- Approvals
 - Unless otherwise requested by the department, all orders will auto approve under \$500. Anything over \$500 will go to the department chair.
- Receiving
 - When you receive the item(s), you will need to go into Unimarket and receive the item.
 - Access the receiving page by clicking Receiving in the menu found when clicking on the three horizontal lines in the upper left corner.
 - From here click on the purchase order that has arrived. You can receive either the whole PO by clicking More Actions in the top right of the page or click receive on each item.