

CU Marketplace Requisition Checkout Quick Guide



The CU Marketplace powered by JAGGAER provides access to negotiated contracts and pricing with Columbia's preferred suppliers. This Quick Guide covers how to proceed to Checkout from a Shopping Cart and submit the Cart as a Requisition for approval. Only Requisition Requesters can submit a Requisition into workflow.



Checking Out a Shopping Cart

After shopping for items from Catalog vendors or completing a Non-Catalog Goods or Service Request, you will be viewing your Shopping Cart. From your Cart, you can Proceed to Checkout.

At checkout you must ensure that the Ship-To/Bill-To Addresses and the ChartString information is complete and correct. If you created default values in your Profile (refer to the [Modifying Profile Settings in the CU Marketplace job aid](#)), those values will be populated. Ensure this information is complete before placing your order.

On the Shopping Cart page, click the **Proceed to Checkout** button.

The screenshot shows the 'Shopping Cart' page in the CU Marketplace. The header includes the Columbia University logo, a search bar, and a total of 209.08 USD. The main content area shows a search bar, a list of items (Staples), and a 'Proceed to Checkout' button highlighted in red. The right sidebar shows details for the cart, including the total amount and a list of items.

The Checkout screen appears.

The screenshot shows the 'Requisition' page in the CU Marketplace. The header includes the Columbia University logo, a search bar, and a total of 209.08 USD. The main content area shows a 'Draft' status, a list of required fields (Billing address, GL Business Unit, Account, Project, Activity, Department, PC Business Unit), and a 'Place Order' button. The right sidebar shows details for the requisition, including the total amount and a list of items.

The **Status** panel on the right indicates all the required information that you must complete. You can click the link to access the field to update it. Fields within the form that require completion will be labeled Required.

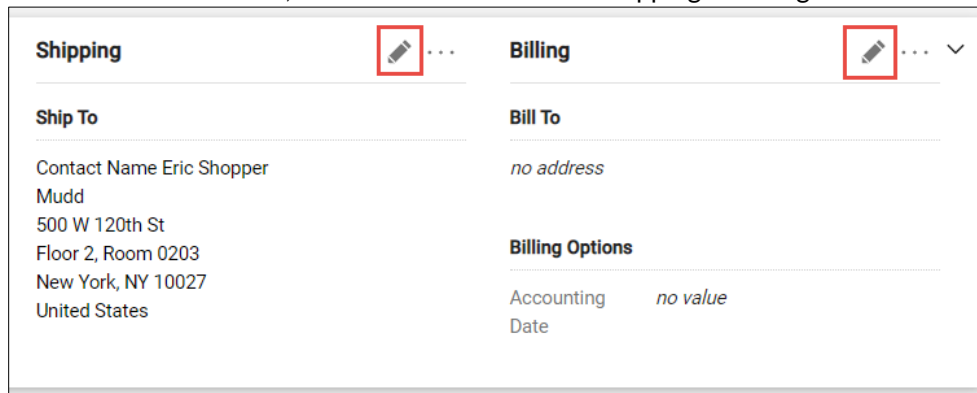
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Completing the Requisition

Updating Shipping and Billing

1. On the Checkout screen, click the **Edit**  icon for Shipping or Billing.



Shipping  ...

Ship To

Contact Name Eric Shopper
Mudd
500 W 120th St
Floor 2, Room 0203
New York, NY 10027
United States

Billing  ...

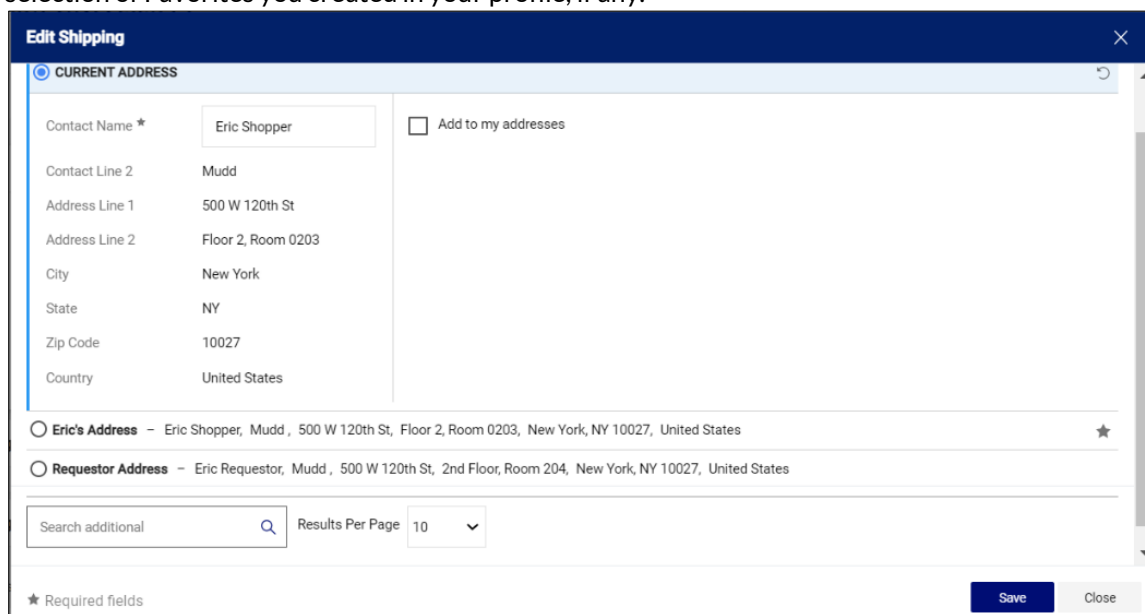
Bill To

no address

Billing Options

Accounting no value
Date

The Edit window will appear for the item you selected. It will display the Current Address populated, if any, and a selection of Favorites you created in your profile, if any.



Edit Shipping [X]

CURRENT ADDRESS

Contact Name * Eric Shopper ☐ Add to my addresses

Contact Line 2 Mudd

Address Line 1 500 W 120th St

Address Line 2 Floor 2, Room 0203

City New York

State NY

Zip Code 10027

Country United States

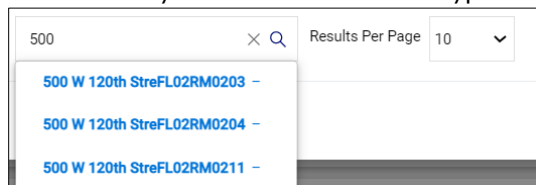
☐ **Eric's Address** - Eric Shopper, Mudd, 500 W 120th St, Floor 2, Room 0203, New York, NY 10027, United States ★

☐ **Requestor Address** - Eric Requestor, Mudd, 500 W 120th St, 2nd Floor, Room 204, New York, NY 10027, United States

Search additional [Q] Results Per Page 10 [v]

★ Required fields [Save] [Close]

2. Select one of your Profile favorites or type in the **Search additional** field to find and select an address.



500 [X] [Q] Results Per Page 10 [v]

500 W 120th StreFL02RM0203 -

500 W 120th StreFL02RM0204 -

500 W 120th StreFL02RM0211 -

3. Click the **Save** button.

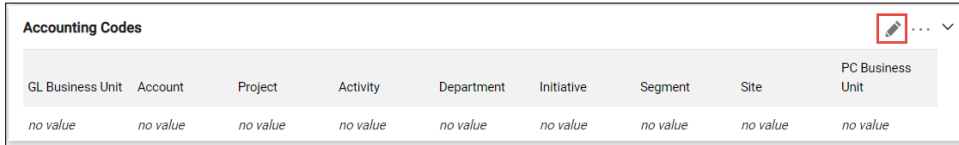
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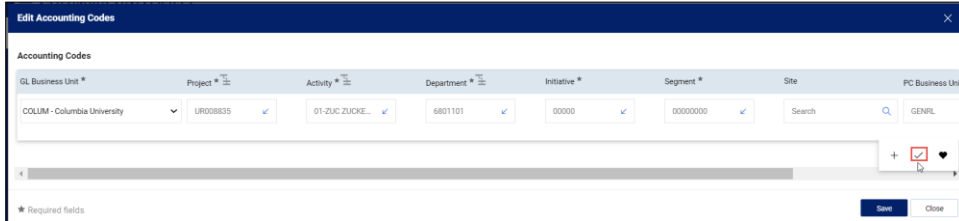
Completing the Requisition

Updating the ChartString (Accounting Codes)

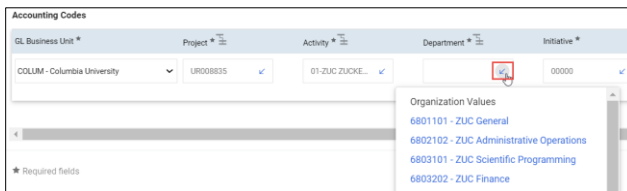
1. On the Checkout screen, click the **Edit**  icon for Accounting Codes.



The Edit window will appear. It will display the default ChartFields from your Profile.



2. Update the ChartFields as needed. They must be entered in order left to right as the available values are dependent on the value in the previous field. You can click the **Dropdown**  arrow in the field you are updating to view the available values.



3. Click the **Validate**  icon to ensure your ChartFields were entered correctly. If you corrected a ChartField and it still appears as Required , click the Validate icon again.

You can click the **Add Split**  icon to add an additional ChartString line and indicate a percent distribution.

You can click the **Code Favorites**  icon to select a favorite ChartString you created in your Profile.

4. Click the **Save** button.

Note: You can assign different ChartStrings to each item in your Cart as needed. Click the Edit icon in the ChartString section for the item. Some product Categories map to multiple Accounts. If that is the case, you will be required to select the appropriate Account number from a dropdown in the Account field.

Inserting an Ad-Hoc Approver

If you need to have additional Approvers view and approve your Requisition, you can insert one into workflow. Refer to the [Inserting an Ad-Hoc Approver into Requisition Approval Workflow](#) tip.

.Placing Your Order

After ensuring that all required fields are populated, the Status pane will not list any further requirements. Click the **Place Order** button.



The Cart has now been entered as a Requisition into approval workflow.