



How-To Guide for End Users

CSUBuy is a Web-based sourcing solution for office supplies, electronics, laboratory products, and other commodities. CSUBuy provides a unified procurement and shopping environment. Members can enjoy powerful savings opportunities in grouping their spend that goes beyond any single organization's ability.

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Login URL Production Environment:

<https://csyou.calstate.edu/Projects-Initiatives/csubuy/Pages/default.aspx>

CSUBUY Marketplace roles of Shopper and Requester perform several actions related to searching for supplier goods and services, creating shopping carts, placing orders and tracking order status

Shopper

Users with Shopping-only permissions can add items and requests to a cart, then assign the cart to another individual (requester) for review, completion, validation and submission.

- Shoppers are allowed to shop, but cannot place an order
- A shopper “assigns” a cart to a requester.
- Prepare Requisition for another user
- Shoppers simply add items to their cart but are not able to make payments

Requester

The term requester is used to identify individuals who are responsible for reviewing and submitting shopping carts:

- Requesters can submit their own orders or orders assigned to them by a system shopper.
- Requesters can return a shopping cart from a Shopper if they have identified any discrepancies or have concerns.

Resource Definitions

Filters: filters are available to help you narrow down the list of documents that are available.

Requisition: once the cart enters the checkout process it is assigned a requisition ID number

Permissions: permissions are granted through role assignment granted by a system administrator.

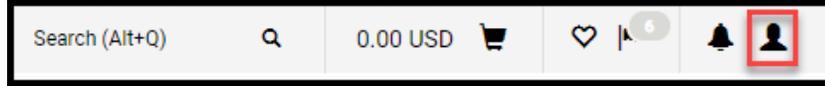
Procard: a University issued Procurement Card.

Purchase Order: once the purchase requisition workflow is complete, a purchase order number is created.

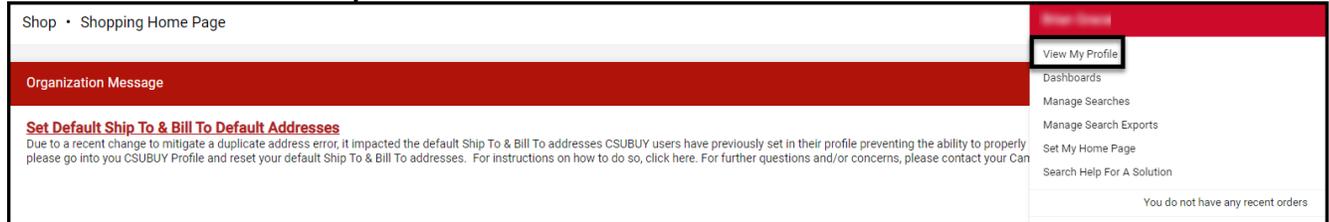
Updating your User Profile

How to add/update your User Preferences

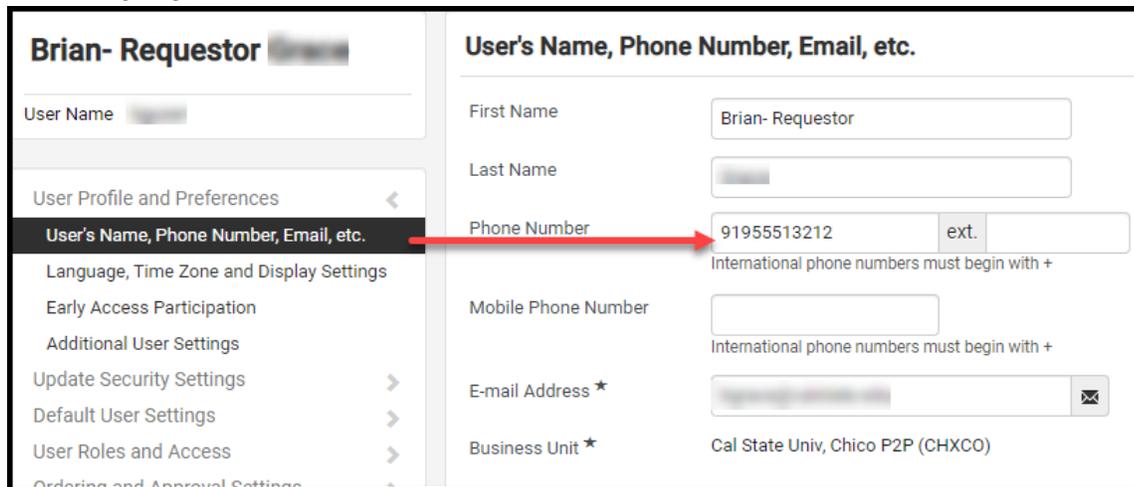
In the upper right side of the Shopping Home page, click the icon of a head



1. Click on View My Profile

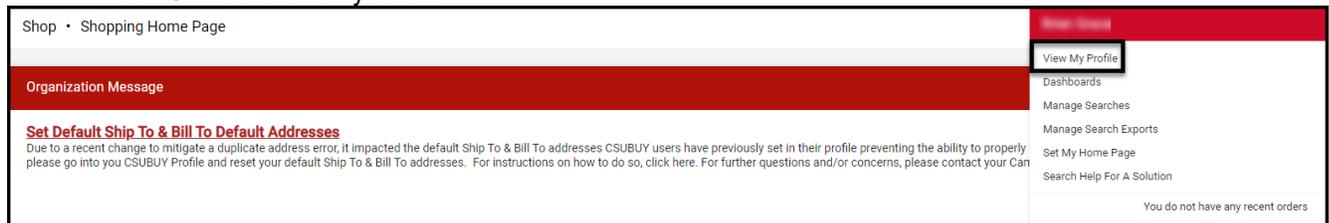


2. Navigate to User Profile and Preferences
3. User's Name, Phone Number, Email, etc. section
4. Add/Verify your phone number
5. Click Save

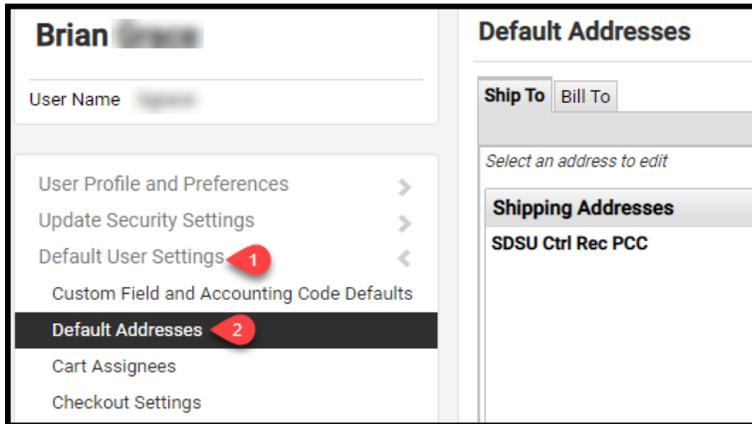


How to add your ship to addresses to your profile

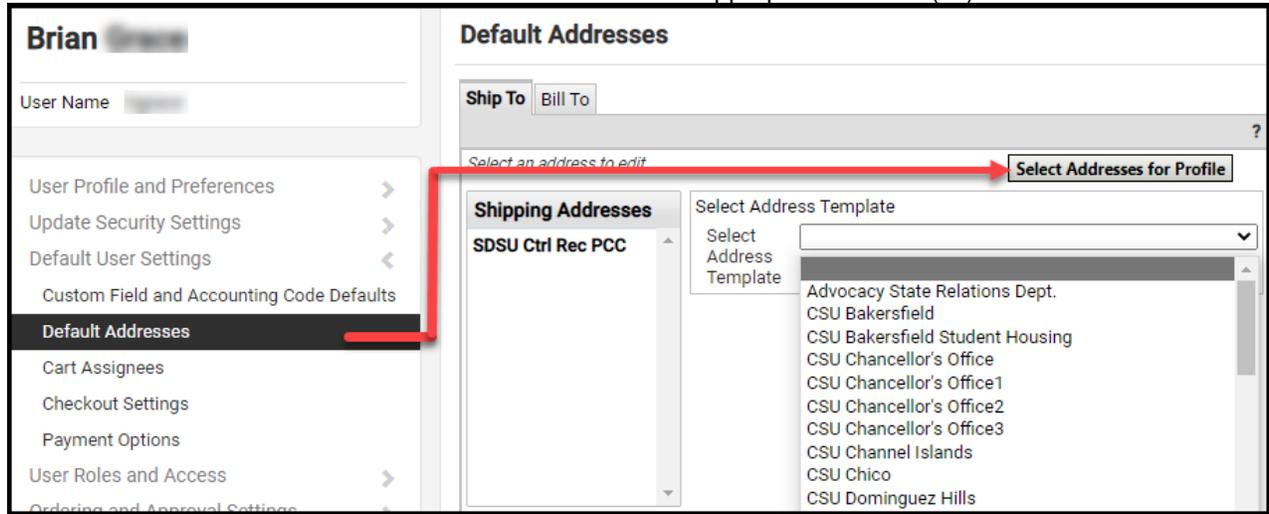
1. Click on View My Profile



2. Navigate to Default User Settings
3. Default Addresses



4. Click Select Addresses for Profile and choose appropriate address(es)



5. Choose the default box for the address you would like to default when checking out
6. Complete the Deliver To: portion with your Building and Room Number
7. Click Save

Default Addresses

Ship To
Bill To
?

Select an address to edit

Select Addresses for Profile
Delete Address

Shipping Addresses

SDSU Ctrl Rec PCC

Edit Selected Address ?

Nickname

Default

Current Default Address SDSU Ctrl Rec PCC

ADDRESS

Attn: *

Deliver To: *

Address Line 1

City

State

Zip Code

Country

Save

How to add a Procard to your profile (Requesters only)

1. Click on View My Profile

Shop • Shopping Home Page

Organization Message

[Set Default Ship To & Bill To Default Addresses](#)

Due to a recent change to mitigate a duplicate address error, it impacted the default Ship To & Bill To addresses CSUBUY users have previously set in their profile preventing the ability to properly please go into your CSUBUY Profile and reset your default Ship To & Bill To addresses. For instructions on how to do so, click here. For further questions and/or concerns, please contact your Car

View My Profile

Dashboards

Manage Searches

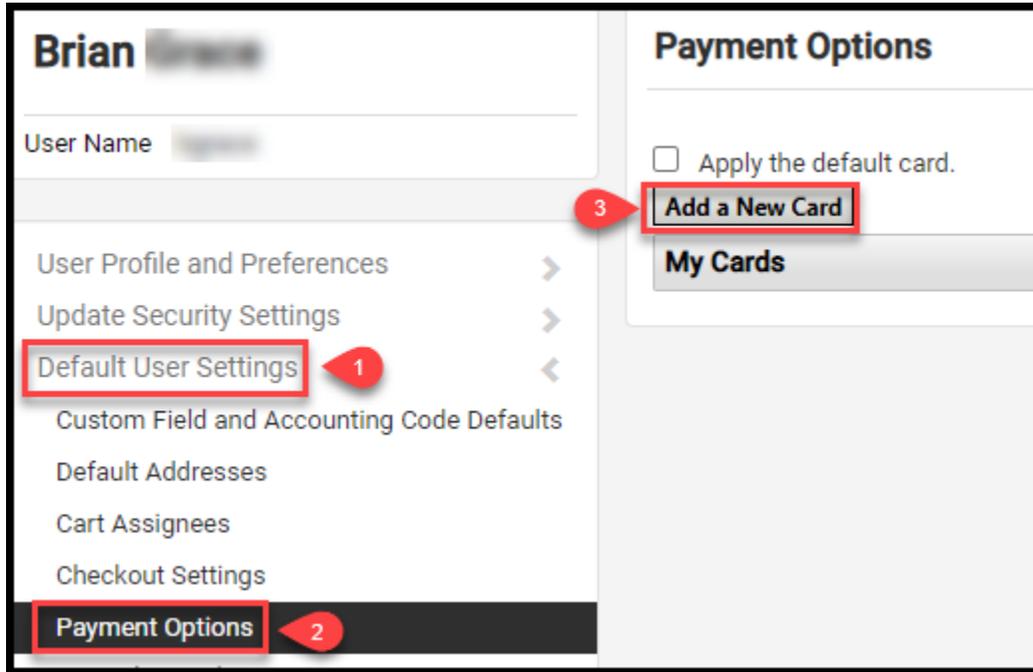
Manage Search Exports

Set My Home Page

Search Help For A Solution

You do not have any recent orders

2. Navigate to Default User Settings
3. Payment Options
4. Click Add a New Card and enter in the Procard details



5. Complete the Card Details Section
6. To have your Procard default in your shopping cart, select **Default Card**

Card Details

Name this card (e.g. My Visa)

Cardholder Name

Card Number

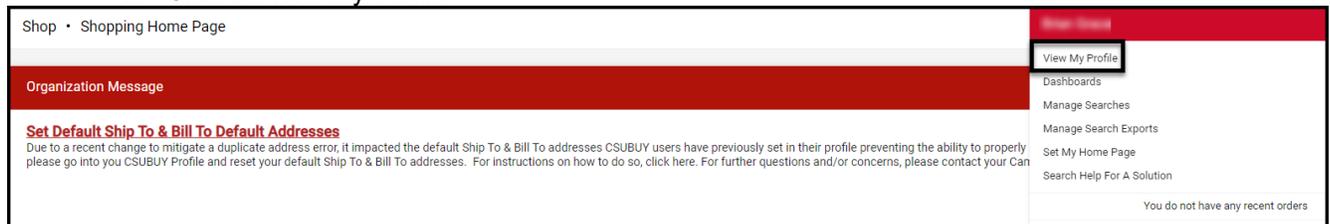
Expiration Date

Default card

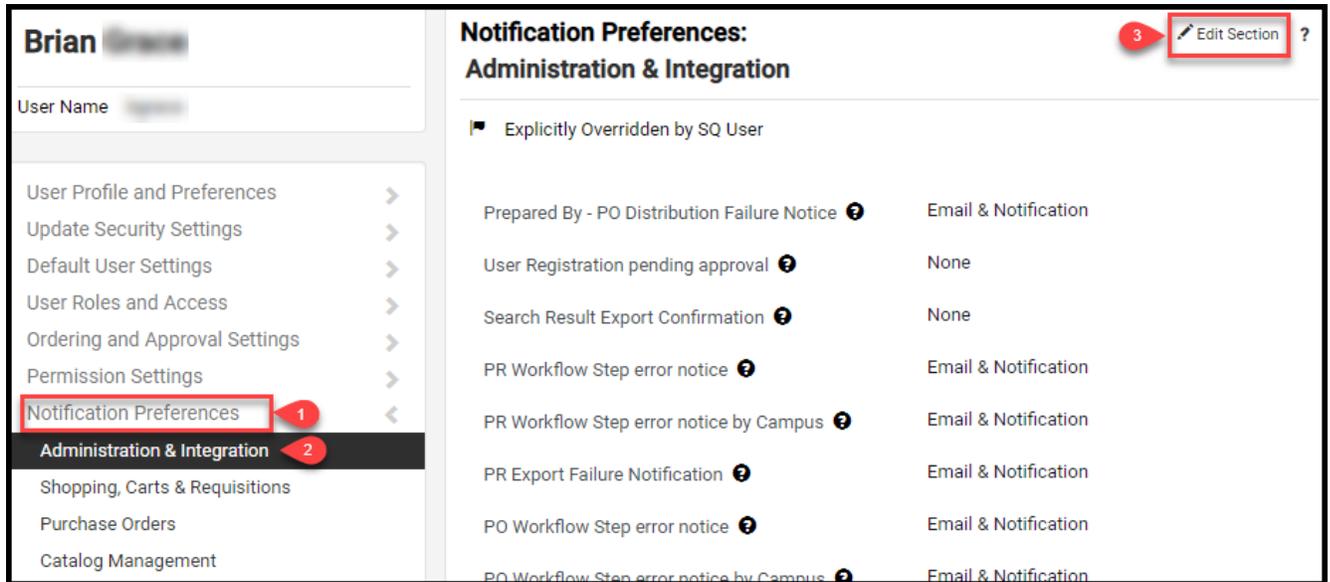
7. Click **Save**

How to update your system notifications

1. Click on View My Profile



2. Navigate to Notification Preference



Brian [Last Name]

User Name [Name]

- User Profile and Preferences >
- Update Security Settings >
- Default User Settings >
- User Roles and Access >
- Ordering and Approval Settings >
- Permission Settings >
- Notification Preferences** 1 <
- Administration & Integration** 2 <
- Shopping, Carts & Requisitions
- Purchase Orders
- Catalog Management

Notification Preferences: Administration & Integration 3 Edit Section ?

Explicitly Overridden by SQ User

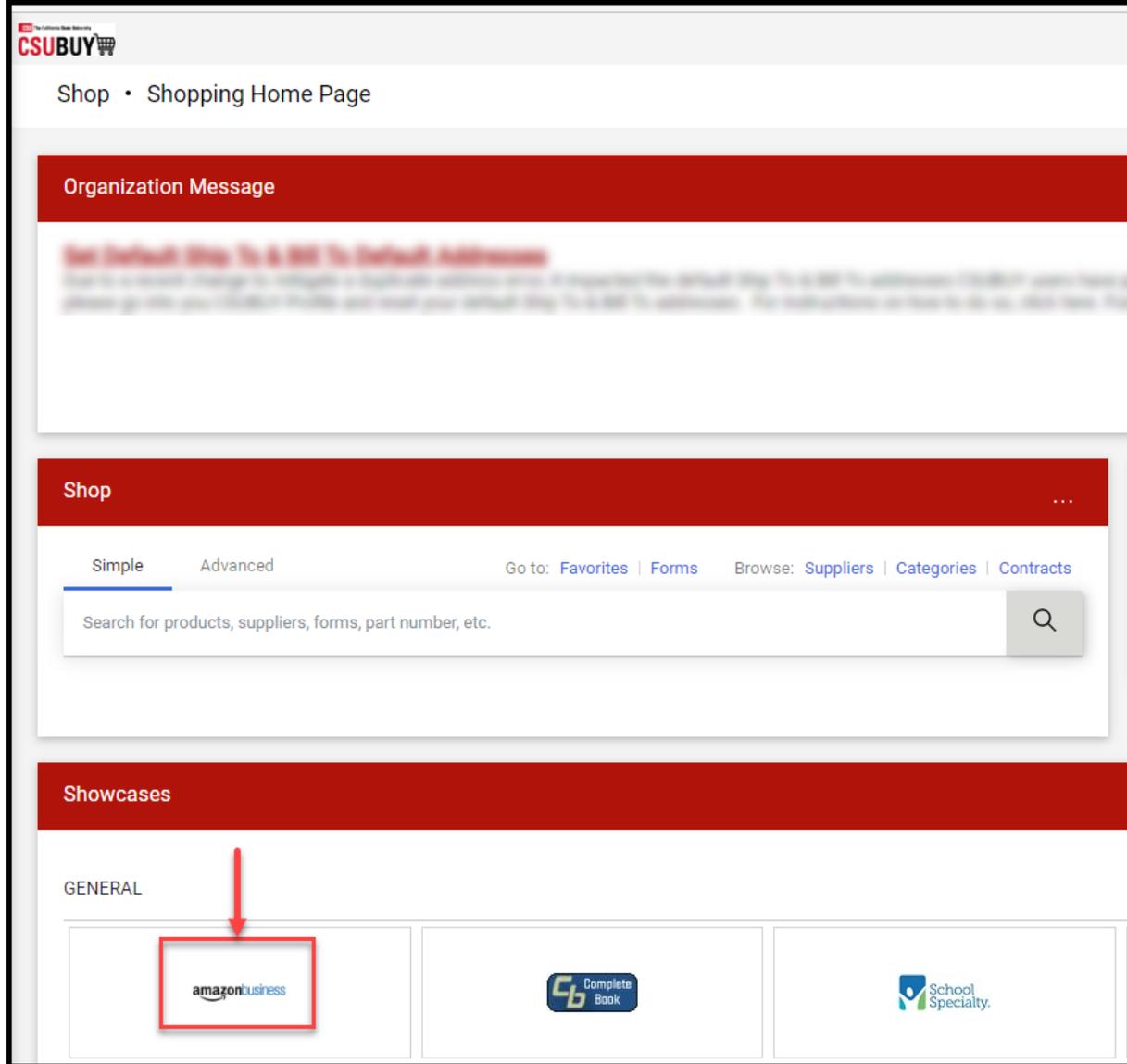
Prepared By - PO Distribution Failure Notice ?	Email & Notification
User Registration pending approval ?	None
Search Result Export Confirmation ?	None
PR Workflow Step error notice ?	Email & Notification
PR Workflow Step error notice by Campus ?	Email & Notification
PR Export Failure Notification ?	Email & Notification
PO Workflow Step error notice ?	Email & Notification
PO Workflow Step error notice by Campus ?	Email & Notification

3. Select Shopping Carts & Requisitions/ Purchase Orders
4. Click on Edit Section
5. Click Override on the field you want to update
6. Select appropriate option from the dropdown
7. Click Save Changes

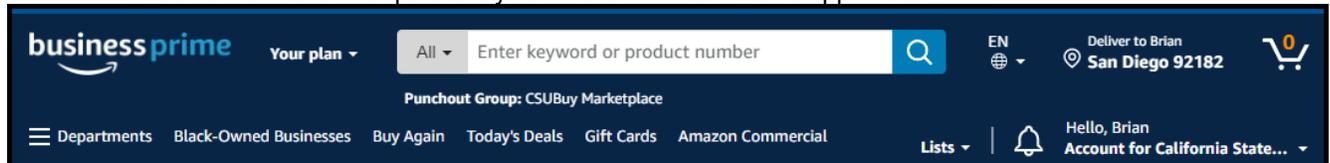
Ordering

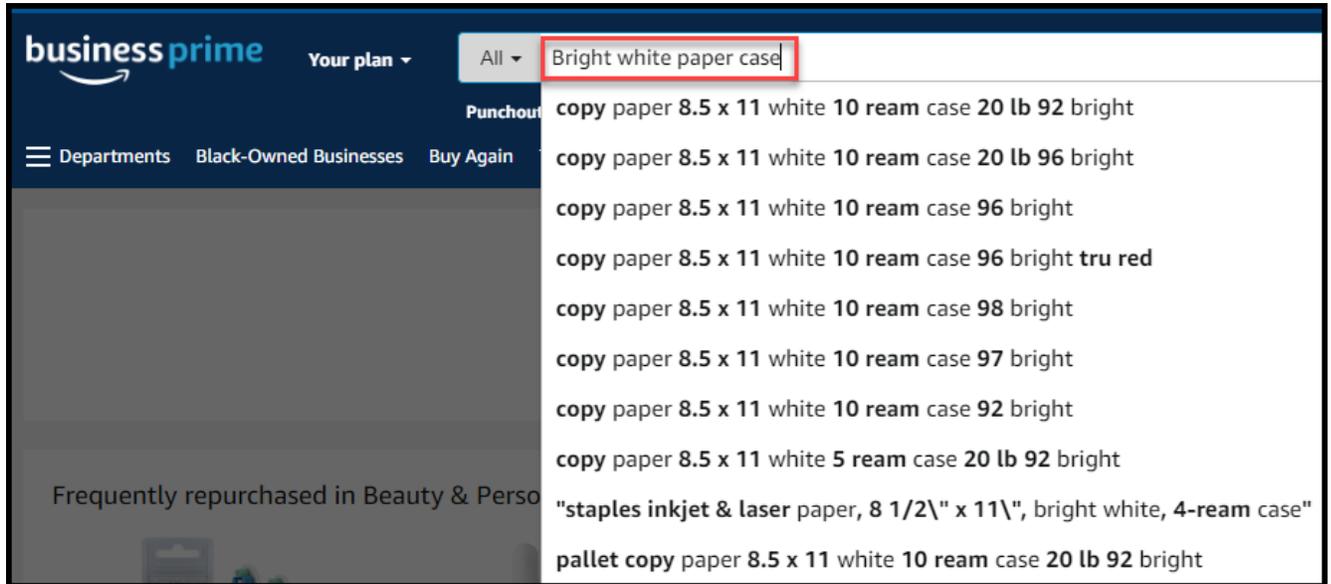
How to punchout to a supplier catalog

1. Navigate to the Home Page Menu Option
2. Look for the Punch-Out Catalogs Showcase
3. Click on the desired supplier



4. A new window will open and you will be directed to the Suppliers website

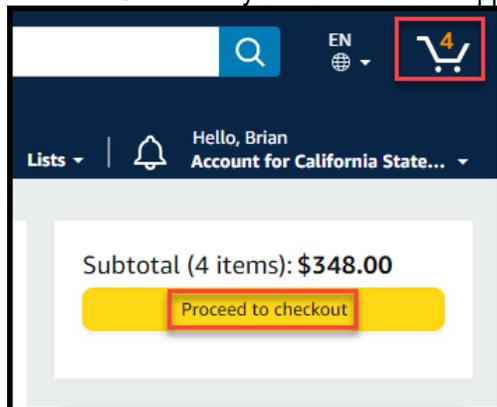




5. To view your items, Click Review Cart



6. When you are finished shopping, Click Proceed to Checkout



7. Click Submit Order

Checkout Process for “Requesters”

This will exit you out of the Punchout catalog and return you to the CSUBuy and Portal page. This example shows two items that require action.

1. You may select individual items, or you may select all by checking the box(es)
2. Click Proceed To Checkout
3. Click the pencil icon on the shipping header to see available addresses

Shipping 	Billing 
Ship To Attn: Brian Deliver To: Brian 5555 Canyon Crest Dr San Diego, CA 92182 United States	Bill To Attn: Brian Deliver To: Brian 5500 Campanile Drive San Diego, CA 92182-1611 United States

4. Select the appropriate address
5. Save changes by clicking the check mark or Save Changes tab

Edit Shipping
✕

Ship To ★

CURRENT ADDRESS ↻

Attn: *	<input type="text" value="Brian"/>	<input type="checkbox"/> Add to my addresses
Deliver To: *	<input type="text" value="Brian"/>	
Address Line 1	5555 Canyon Crest Dr	
City	San Diego	
State	CA	
Zip Code	92182	
Country	United States	

SDSU Ctrl Rec PCC - Brian Grace, Brian, 5555 Canyon Crest Dr, San Diego, CA 92182, United States ★

🔍
Results Per Page
10
▼

★ Required fields

Save

Close

How to add your Procard to your order

1. Click on **Proceed To Checkout**
2. Click the pencil icon on the Billing header
3. Click on **New Credit Card**
4. Enter Cardholder Name, Card Number, Card Security Code and Expiration Date
5. Assign a nickname (Office Visa, Department Visa, Etc.)
6. Select **Add to your credit cards** as necessary
7. Click **Save**

Credit Card Info

Select a new credit card

New credit card

Cardholder Name

Card Number

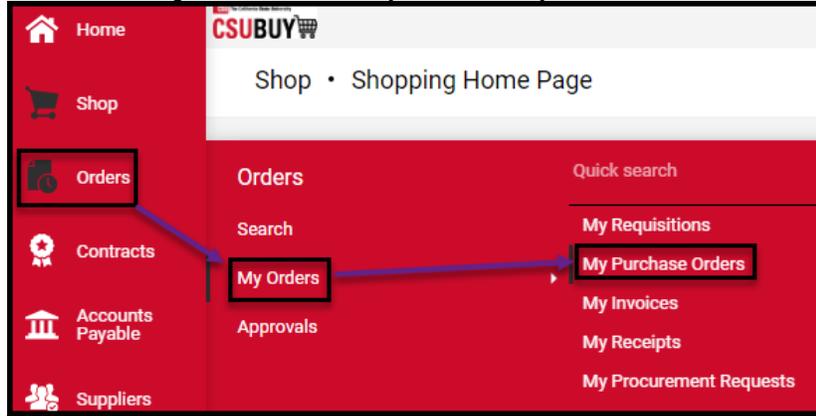
Card Security Code

Expiration Date

Add to your credit cards

★ Required fields

1. Navigate to Orders > My Orders > My Purchase Orders



2. Click the PO Number for more details

Created Date: Last 90 days | Quick search | Add Filter | Clear All Filters

PO Owner: Brian

Page 1 of 2 | 1-20 of 21 Results | 20 Per Page

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
3751673	Dell	2/28/2023 7:38:30 AM	Completed	3716096	Brian	Sent To Supplier	No Matches	1,863.11 USD
3751706	Dell	2/28/2023 7:36:06 AM	Completed	3716107	Brian	Sent To Supplier	No Matches	1,698.50 USD

3. Review details, including the PO status and date and time of PO distribution to the supplier

Purchase Order • Dell • 3751673 Revision 0

Status Summary Revisions 1 Confirmations Shipments Change Requests Receipts Vouchers Comments 1 Attachments History

General Information

Supplier Name: Dell

Purchase Order No.: **3751673**

Revision No.: 0

Create Date: 2/28/2023

Total: 1,863.11

Owner Name: Brian

Owner Email: brian@csu.edu

Document Status

Requisition Number: 3716096 view | print

Workflow: ✓ Completed (2/28/2023 7:38 AM)

AP Status: Open

Supplier Status: Sent To Supplier

The system distributed the purchase order using the method(s) indicated below the last time it was distributed: view

cXML (Electronic Integration): no value

Distribution Date/Time: 2/28/2023 7:38 AM

Line Details

Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 ✓	Base/Dell Latitude 7420 XCTO	210-AYBC	EA	1,471.21	1 EA	1,471.21

DETAILS

Supplier	Receiving	Invoicing	Matching
Sent To Supplier	none	none	No Matches