CUBuyplus®

Browser's Guide

This guide will review how to search for products and add them to your cart. In addition, the procedure for generating a purchase request will be outlined as well as tracking these requests.

Logging into CUBuyplus®

1. Open your web browser.
2. In the address field, type: https://creighton.unimarket.com/app/login .
3. The login page will appear.
4. From the Username field, type your ***NetID.***
5. From the Password field, type the ***password*** you created.
6. Press **Enter** or click **Login**.
7. The CUBuyplus® home page will appear.

Key Concepts

- There are three types of suppliers found in CUBuyplus®:
  - **Premium Supplier** – supplier who has a hosted catalog on the CUBuyplus® website or provides roundtrip/punchout access to their site from CUBuyplus®.
  - **Lite Supplier/Non-Catalog Supplier** – supplier who does not have a hosted catalog on CUBuyplus® or provide roundtrip/punchout access to their site and instead requires products to be manually added on CUBuyplus®.
  - **Registered Supplier** – same as a Lite Supplier, however, the supplier is maintaining their company and tax profile information.
- Products to be ordered from a supplier can be accessed in one of three methods:
  - **Catalog** – supplier products are "hosted" on the CUBuyplus® website, meaning you do not leave the CUBuyplus® website to search and order these products. Suppliers who have a catalog will be identified with the folder icon.
  - **Roundtrip/Punchout** – supplier products are found on the suppliers' website with a direct link to and from CUBuyplus®. Suppliers with the roundtrip functionality will be identified with the globe icon.
  - **Manual** – supplier products require all information to be entered. Even Premium Suppliers could have products that are entered manually if a product is not found in any of their catalogs. Suppliers with manual orders will be identified with the paper and pencil icon.

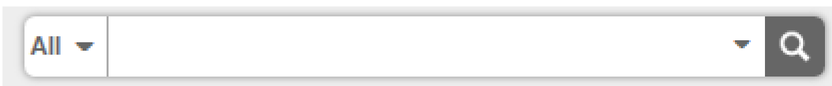
Searching

Suppliers and products to be ordered can be located by searching the loaded catalogs of premium suppliers or by individual supplier. Each search option is detailed below.

Product Searching

Product searches can be completed using the search function in the title section of CUBuyplus[R]. Only the loaded catalogs of premium suppliers will be searched. To search in this method, complete the steps listed below:

1. From the title section, type the ***product name*** in the search field.



2. Click the **Search** button  .
3. Any products that match the criteria will appear in the information section.

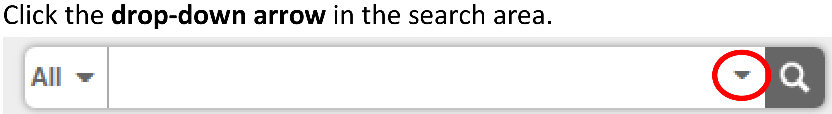
Searching Tips

- 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.

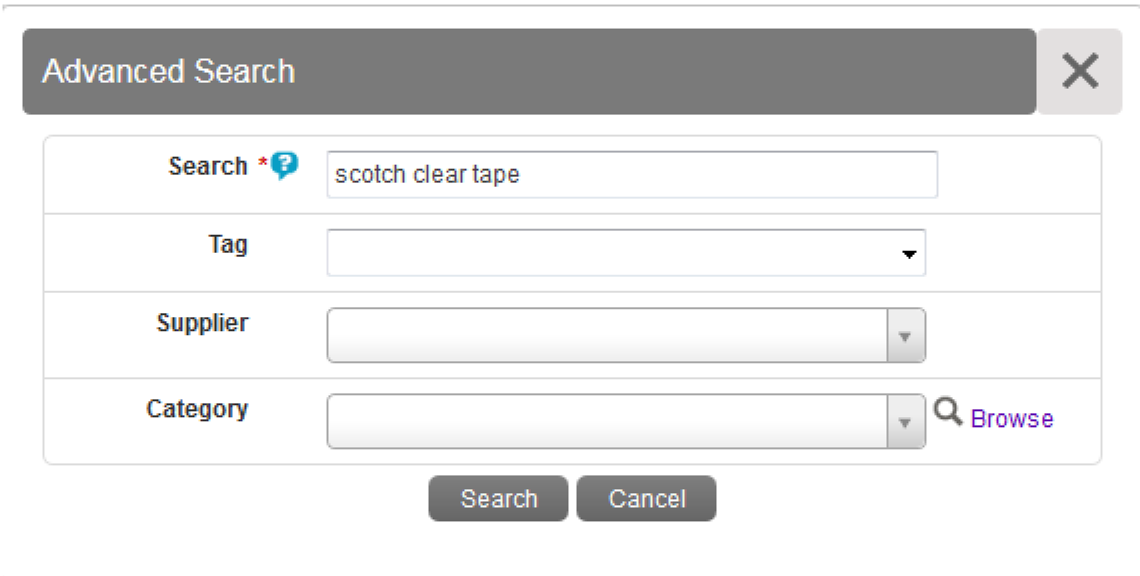
Advanced Searching

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

1. Click the **drop-down arrow** in the search area.



2. From the Advanced Product Search window, type the ***name of the product*** you are searching for.



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 **Supplier** or **Category** from the drop down list
   NOTE: Only the premium suppliers will show up in the drop down list of suppliers.
4. Click **Search**.
5. Any products that match the criteria will appear in the information section.
   NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled.

Supplier Searching

If you are searching for products from 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 tab on the menu bar, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- From the **Marketplace tab** on the menu bar, click **View Suppliers** or **Recently Used Suppliers**.

Once the supplier you wish to shop has been located, click the **Supplier Name** or **Supplier Icon** to continue.

Supplier Icons

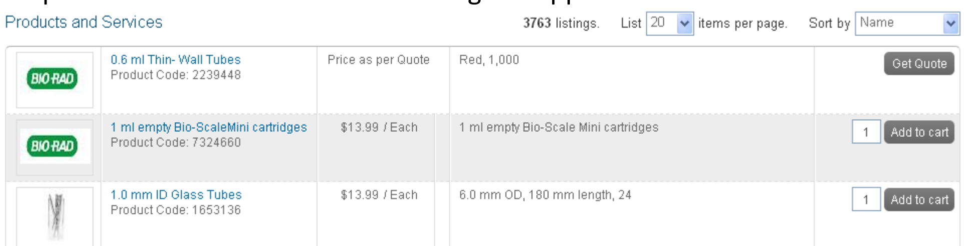
When viewing suppliers, they may be flagged by one or more icons. These icons and what they represent are noted below:

- **Hosted Catalog -** Suppliers flagged with the folder icon are premium suppliers. Premium suppliers have a hosted catalog on the CUBuyplus[R] website.
- **Roundtrip Catalog –** Suppliers flagged with a circle and arrow are premium suppliers. Premium suppliers provide roundtrip/punchout access to their site from CUBuyplus[R].

Shopping by Catalog

If a catalog icon appears after clicking on the supplier name or icon, you will be selecting products from the supplier's catalog on CUBuyplus[R]. 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.



3. Browse or page through the products available.
4. The list of products can be narrowed by typing in a ***product name*** in the search field at the top of the screen. Refer to the section on Product Searching for more detail.
5. The sort option of products defaults to Name but can be changed to Code, Lowest Price, or Highest Price.
6. Clicking on the ***product title*** may display more information about the product.
7. Depending upon the item, there may be a View or Get Quote button.
   a. If there is a View button, click **View** and then select the necessary Configuration options; i.e. Size, etc.
   b. If there is a Get Quote button, click **Get Quote** to generate a Request for Quote. See the Request for Quote Documentation for specifics.
8. 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. 1 Add to cart
9. Click the **Add to cart** button.
10. A confirmation message will appear and the shopping cart in the header bar will update to reflect the total number of products along with the dollar amount. Items: 13 Total: $211.83
11. Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a circle with an arrow icon appears after clicking on the supplier name or icon, you will be sent to the supplier's website.

1. Click the **supplier** that you wish to shop.
2. Click the **roundtrip icon** or **supplier name** to go to the supplier's website.
   

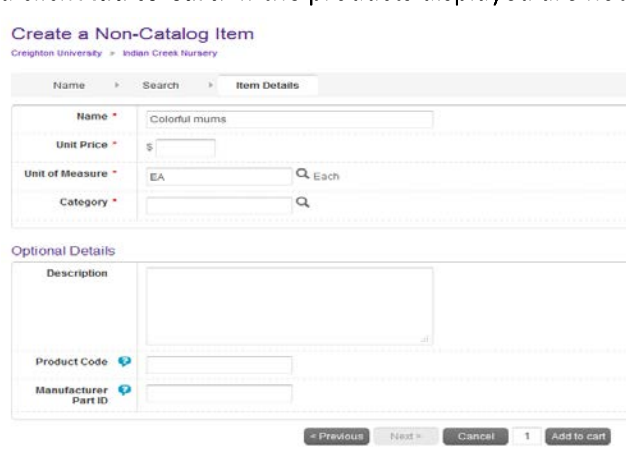
3. Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.
4. Add products that you wish to purchase to your cart or order on the supplier's website by clicking the **Add button**.
   NOTE: The terminology of the button to click will vary based on the supplier's website.
5. When finished shopping, click the **Checkout** or **Submit Requisition button** to return to CUBuyplus[SM].
   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 CUBuyplus[R] with the products you had selected.

Shopping by Manual Order

If a paper and pencil icon appears after clicking on the supplier name or icon, you will need to enter all of the product's information as it is not in their catalog.

1. Click the **supplier** that you wish to shop.
2. Click the **paper/pencil icon** or **Create a Non-Catalog Item link** to enter the products to order.
   

3. From the Item Name field, type in the ***name of the product*** to be ordered.
4. Click the **Next button**.
5. Products similar to what you entered may 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 the same, click **Next** to continue.
6. Type in the ***product information***.
   NOTE: Fields marked with a red asterisk are required fields.
   a. **Unit Price** – type in the ***cost*** of one product.



   b. **Unit of Measure** - type in the ***Unit of Measure*** or select it by clicking on the **magnifying glass.**
   c. **Category** – type in the ***category code*** or select it by clicking on the **magnifying glass**. The category is equivalent to the Commodity Code in Banner.
   d. **Description** – basic description of product.
   e. **Product Code** - supplier's product number.
   f. **Manufacturer Part ID** – manufacturer's unique identifier for the product.

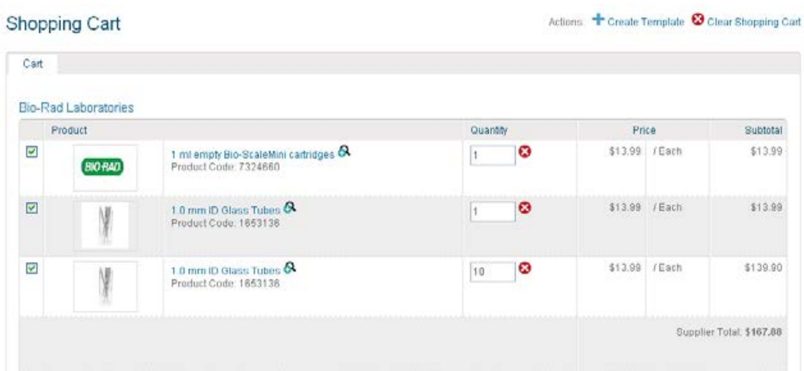
7. Next to the Add to cart button, type in the ***quantity*** to be ordered.
8. Click the **Add to cart button**.
9. You will be returned to the product screen to enter the next product. Repeat steps # 3 – 8 for each product that needs to be ordered.

Shopping Cart

As you are searching and selecting products from suppliers, the products are added to your shopping cart. The shopping cart appears in header bar. The number of products and total cost will appear.

Reviewing the Shopping Cart

1. Click the **shopping cart icon** to view the products that have been added.
2. All products in the cart will appear by supplier with an individual supplier total.

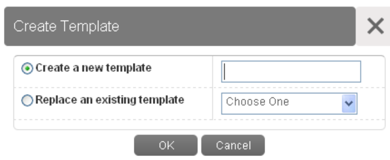


3. To adjust the quantity of any product, type the ***new quantity*** into the Quantity field of the product. Press **Tab** to update the information.
   NOTE: A confirmation message will appear.
4. To remove any product from the cart, click the **red X icon** next to the Quantity field.
5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right hand portion of the screen.

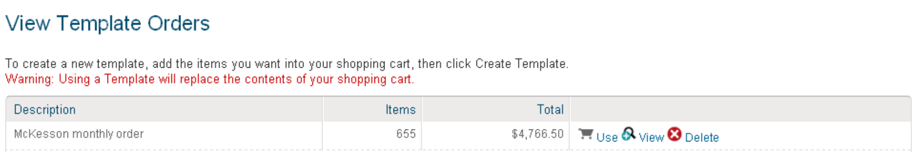
Creating a Template of Frequently Ordered Products

If you have products that you regularly order, you can create a template that can be reused every time you need to order those products. The products to be added to the template need to be in the cart before proceeding.

1. From the cart screen, click **Create Template**.
2. The Create Template screen will appear.



3. The radio button for Create a new template will be selected. Type a ***name*** for the template in the field to the right.
4. If a template has already been created and needs to be changed, select **Replace an existing template** and select the **template** from the list.
5. Click **OK**.
6. Once a template has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Template Orders**. The following options are available:



   a. **Use** – click **Use** to add the products to your cart. Doing so will replace anything that is currently in the cart.
   b. **View** – click **View** to see all products in the template. Pricing is updated as it changes.
   c. **Delete** – click **Delete** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.

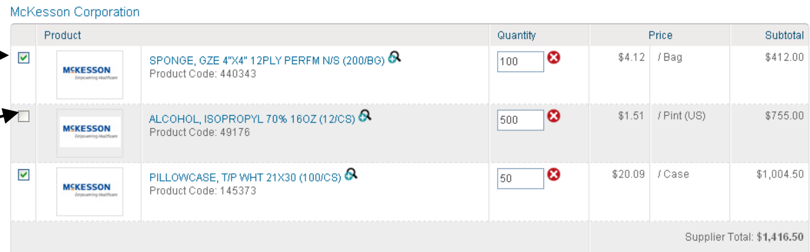
Initiating the Checkout Process

Individuals with a browser role in CUBuyplus[R] will need to enter some basic details regarding their order request.

Any products appearing in the shopping cart with a check in front of the product will be forwarded on. 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.

Product will be ordered

Product will NOT be ordered



1. To initiate the checkout process, click the Checkout button at the bottom of the page.
2. From the **Ship To** field, select **the appropriate Ship To Code** for your department.
   NOTE: If your department ship to or the location the order needs to go to does not appear in the Ship To Code field or there are special instructions regarding the delivery, select **NOTE** and then type that location information in the Delivery Notes field.
3. From the **Ship To Attn** field, the login name will appear. If the order needs to go to another person's attention, type ***their name***.
4. In the **Bill To** field, leave ***Creighton University Accounts Payable***.
5. The **Delivery Date** field is optional. No guarantee that the supplier is reading this field. Rush orders should be communicated directly to the supplier.
6. **Account** information – this is the accounting information (FOAPAL) that needs to be charged for this order. Hovering over the field will provide the field name. Selecting the magnifying glass after the field will search for valid values. Browsers should enter as much as they know and provide notes to the Buyer in the reassignment step.
   FOAPAL field in order shown:

COAS - identifies the Chart of Accounts in Banner Finance. C is the only acceptable value for this field.

FUND – Fund code

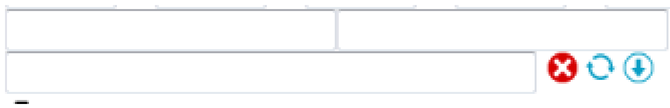
ORGN – Organization code

ACCT – Account code

PROG – Program code that will be populated by the Business Service Center.

ACTV – Activity code

The next three fields are used exclusively by Facilities:



Workorder – to be used exclusively by Facilities. This field is non-searchable.
Phase – to be used exclusively by Facilities. This field is non-searchable.
Craft - to be used exclusively by Facilities. This field is non-searchable.

After the Craft field there are three icons:

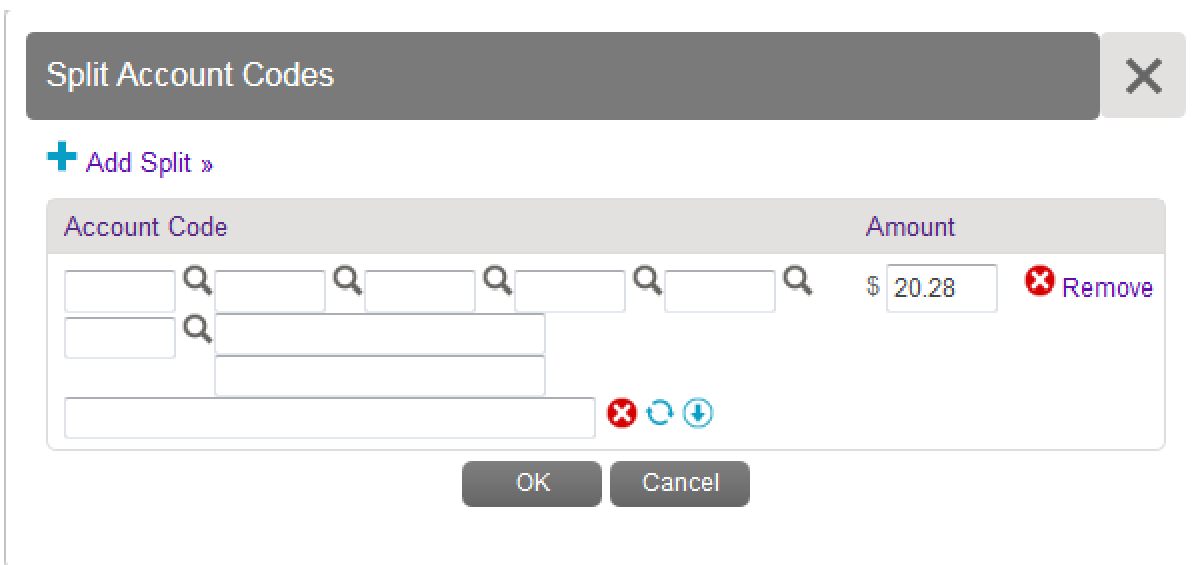
X – will delete the FOAPAL information

- is currently not being used by Creighton

- Will copy the FOAPAL to all lines below this point.

Splitting Accounts

Selecting **Split** Split will open the menu shown below. Use this to split the cost of a single line item to multiple FOAPALS. Enter the first FOAPAL and then select **Add Split** Add Split » to enter the next one and so on until all FOAPALS are accounted for. Note that the sum of the amount fields must add up to the original line item amount. The System will not advance until the splits are in balance.
Click **OK** when completed.



7. From the **Delivery Notes** field, type ***any information about the delivery of the order***. Delivery notes might include inside delivery information or other special instructions.

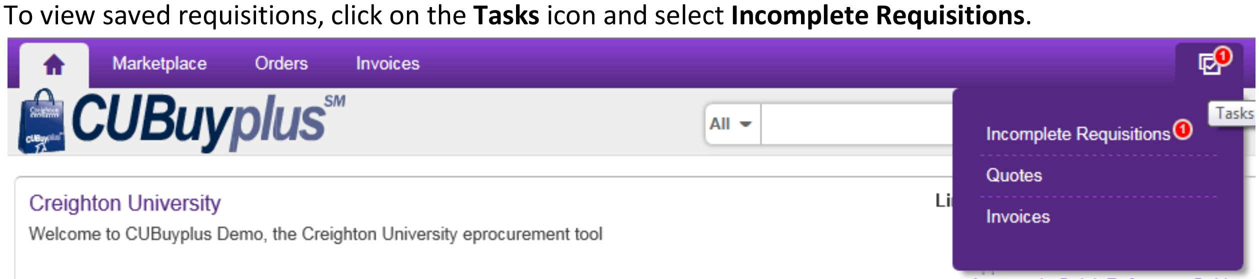
8. Notes can be added to each line item by selecting + Add Notes shown to the right of each line item.
9. From the **Justification** field, type ***why this order is needed as well as any other explanation***.
10. Any documentation that you have to attach as justification can be added by clicking **Add Attachment**.
    a. Click the **Browse button**.
    b. Navigate to where the file is saved and select it.
    c. Click **OK** once the file is listed.
    d. Each file added will be listed in the Attachment section. To delete a file that was added, click the appropriate **Delete button**.
11. Order Attachments – Attachments added here will be sent to the supplier.
12. Order Receiving – Default is **Receive Manually** and should be used for all orders.
13. Save – Allows the user to save the requisition for completing later. The request becomes a requisition, will be assigned a requisition number and will be in an incomplete status. Make note of the requisition number to refer back to.
14. Reassign – When request is completed, the user will want to select **Reassign**. From the drop down menu, select the BSC Specialist assigned to your department. Enter any information that needs to be communicated to the BSC Specialist such as grant being used, blanket order, special instructions, etc.

Tracking Incomplete Requisitions

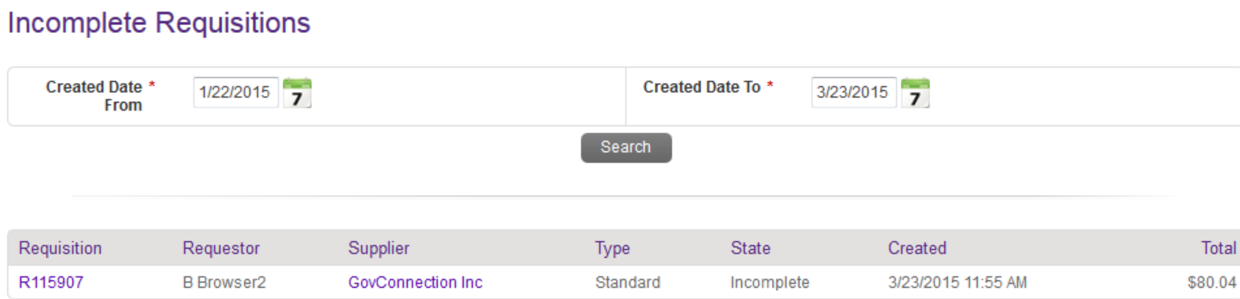
After a requisition has been saved or assigned, you will be able to monitor the progress from your Dashboard on CUBuyplusR.

Saved Requisitions

1. To view saved requisitions, click on the **Tasks** icon and select **Incomplete Requisitions**.

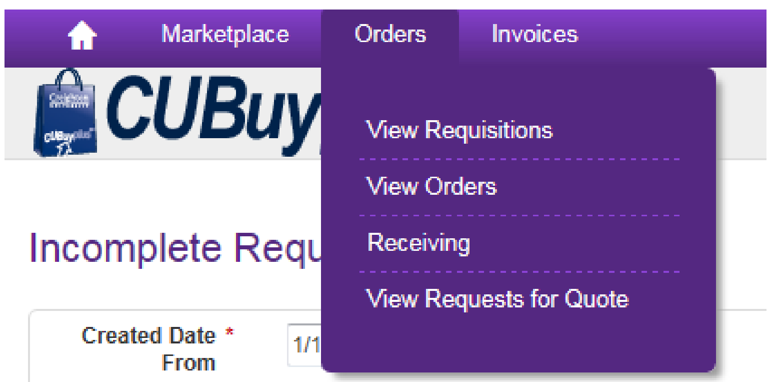


2. You will then see the following screen. Select the appropriate incomplete requisition to view.

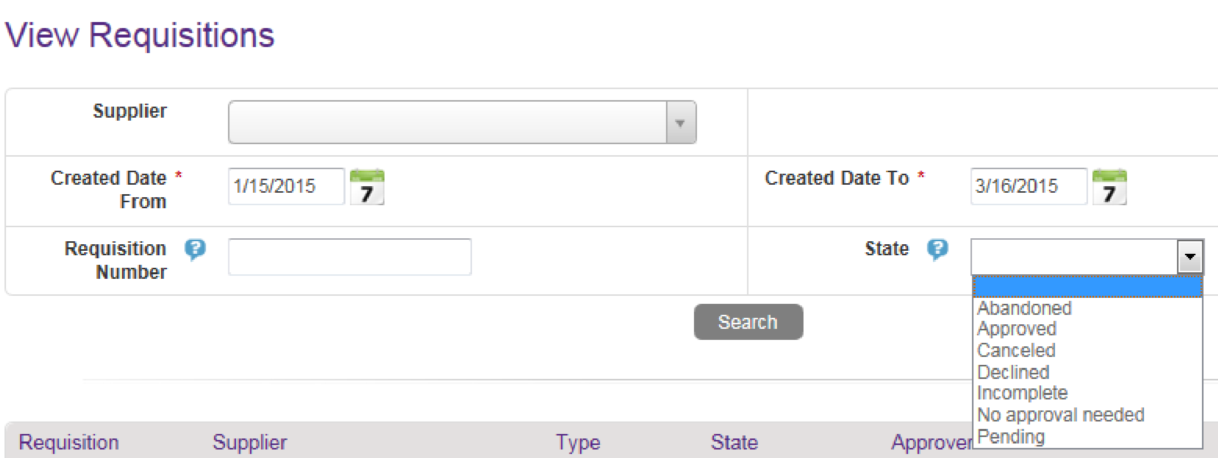


Assigned Requisitions

1. Access Assigned Requisitions by selecting **View Requisitions** located under **Order** on the **Task Bar**.



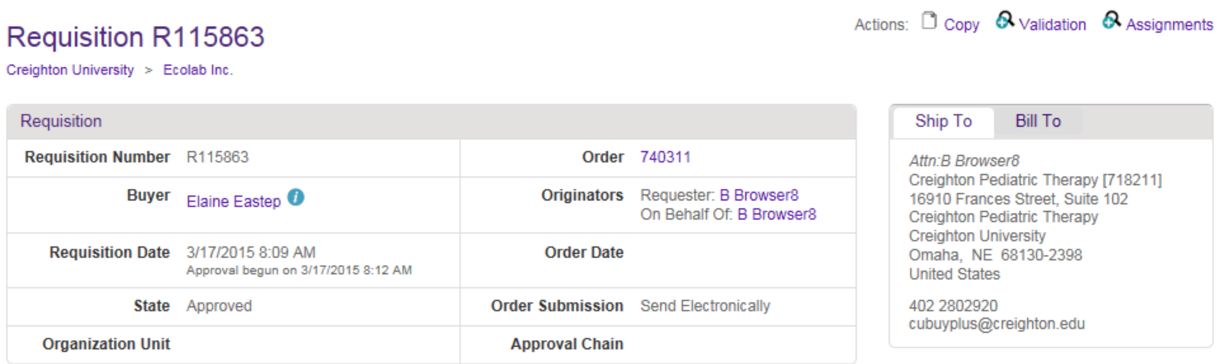
2. You may filter by entering the requisition number and/or selecting **Incomplete** from the **State** drop down.



Users will now be able to determine when an incomplete requisition was started and when the requisition begins the approval process.

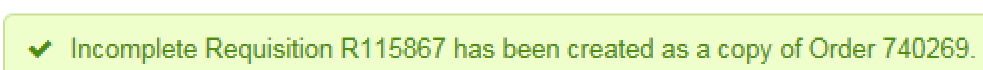
Requisition Date = the date/time checkout is reassigned to a buyer.

Approval begun on date/time = the date/time the buyer completed their review and requisition begins the approval process.



Copying Requisitions

Browsers may copy a requisition or an order. Click on **Copy** to copy a requisition. Message will be returned providing the new incomplete requisition number.

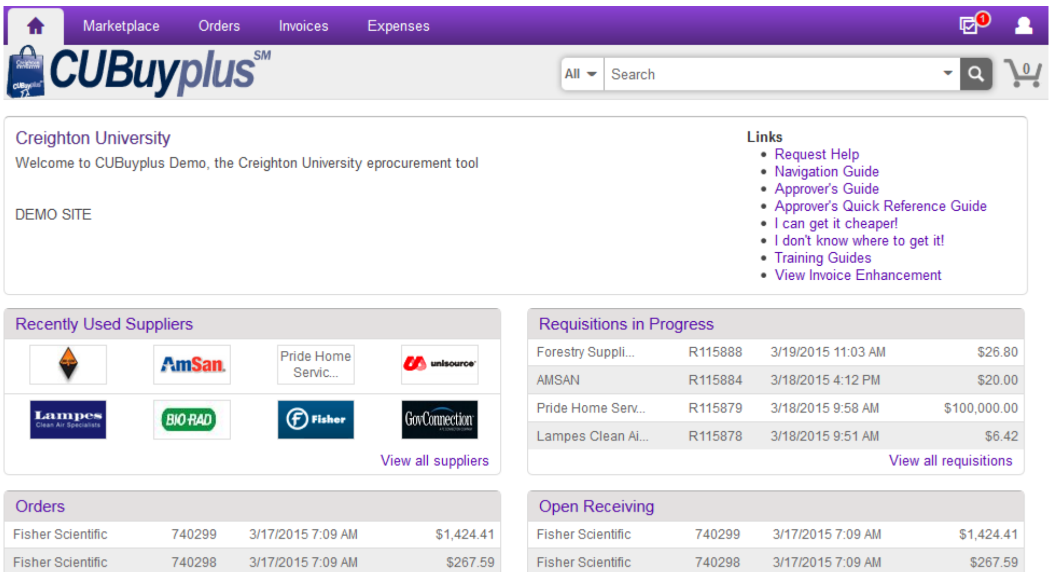


Access the incomplete requisition from the Task Bar. Select **Checkout** to begin editing the copied document for the current activity.

Viewing Requisitions

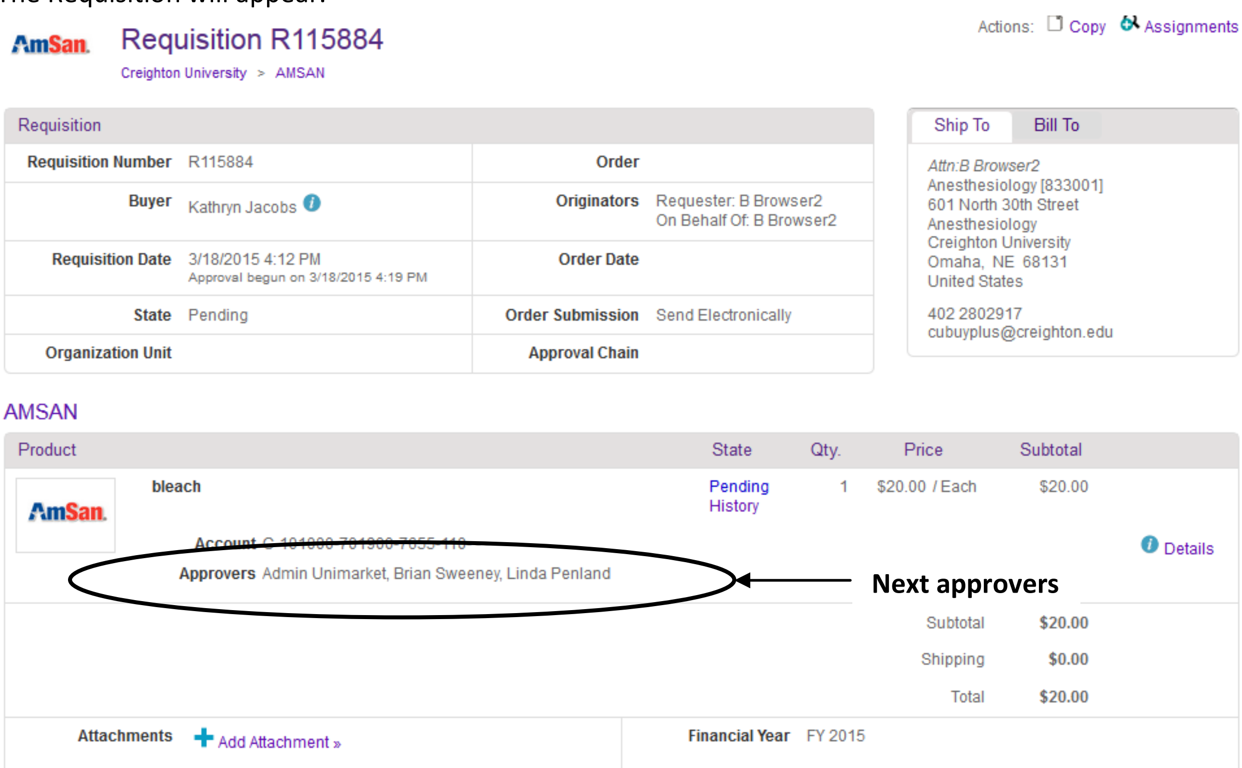
Purchase requests that have begun the approval process can be viewed in the **Requisitions in Progress** area of the information section of the Dashboard. Until a requisition is in the approval process, it will not appear on the dashboard under **Requisitions in Progress**.

1. Purchase requests that have been processed can be viewed in the Requisitions in Progress area of the information section of the Dashboard. Until your buyer has completed the Purchase request, you will not have any visibility to it on the Dashboard.

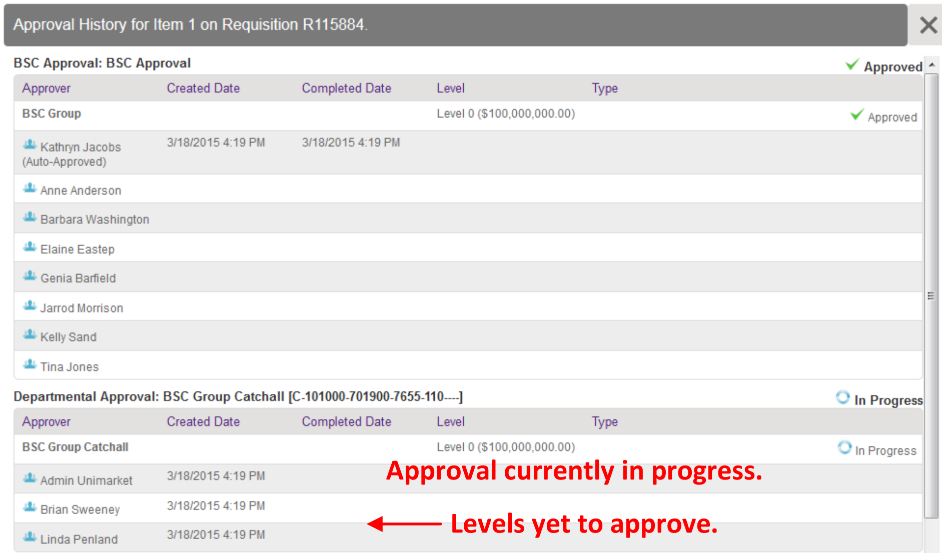


2. If the purchase request is visible, click on the **requisition** from the list.
3. If the purchase request is not visible, click **View all requisitions** to see all of your requests.
   a. The View Requisitions screen will appear.
   b. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search options and the click the **Search button**.
   NOTE: At a minimum, Created Date From, Created Date To, and State must be entered. Additional criteria entered will further narrow the search results.
      i. **Supplier**
      ii. **Created Date From**
      iii. **Created Date To**
      iv. **Requisition Number**
      v. **State**
   c. To select a requisition, click on the **Requisition number** from the list.

4. The Requisition will appear.



5. The next approvers will be listed below each product. One of these individuals needs to approve the requisition before it can continue.
6. The history of approvals for the requisition and the path it needs to take to complete the process can be viewed by clicking **History** in the State column of the product.
7. The Approval History screen for the product will appear. Each of the levels of approval will appear and denote the action taken. If the approval has completed a level, the date and time stamp along with the approver's name will appear to indicate when the action was taken. Those areas where the approval still needs to route to will be listed at the bottom of the screen.


Approval History for Item 1 on Requisition R115884.

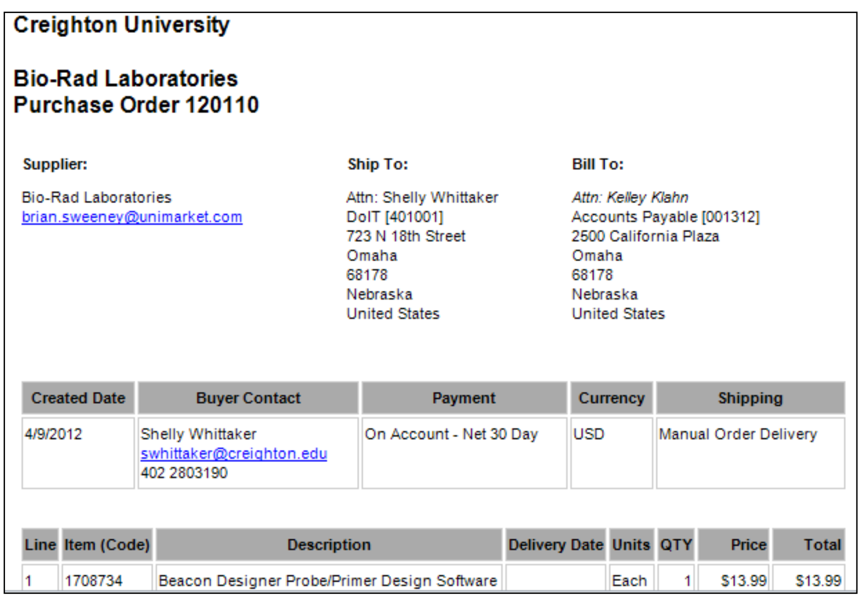
BSC Approval: BSC Approval — Approved

Approver	Created Date	Completed Date	Level	Type	
BSC Group			Level 0 ($100,000,000.00)		Approved
Kathryn Jacobs (Auto-Approved)	3/18/2015 4:19 PM	3/18/2015 4:19 PM			
Anne Anderson					
Barbara Washington					
Elaine Eastep					
Genia Barfield					
Jarrod Morrison					
Kelly Sand					
Tina Jones					

Departmental Approval: BSC Group Catchall [C-101000-701900-7655-110----] — In Progress

Approver	Created Date	Completed Date	Level	Type	
BSC Group Catchall			Level 0 ($100,000,000.00)		In Progress
Admin Unimarket	3/18/2015 4:19 PM				
Brian Sweeney	3/18/2015 4:19 PM				
Linda Penland	3/18/2015 4:19 PM				

8. The various approval statuses include:
    d. **Approved -** approved and advanced to the next level.
    e. **Declined** – was not approved and sent back to buyer.
    f. **Escalated** – skipped an individual to advance to next level.
    g. **In Progress** - current level of approval.
9. 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 yourself as well as the buyer. See sample below.


Creighton University

Bio-Rad Laboratories
Purchase Order 120110

Supplier:	Ship To:	Bill To:
Bio-Rad Laboratories brian.sweeney@unimarket.com	Attn: Shelly Whittaker DoIT [401001] 723 N 18th Street Omaha 68178 Nebraska United States	*Attn: Kelley Klahn* Accounts Payable [001312] 2500 California Plaza Omaha 68178 Nebraska United States

Created Date	Buyer Contact	Payment	Currency	Shipping
4/9/2012	Shelly Whittaker swhittaker@creighton.edu 402 2803190	On Account - Net 30 Day	USD	Manual Order Delivery

Line	Item (Code)	Description	Delivery Date	Units	QTY	Price	Total
1	1708734	Beacon Designer Probe/Primer Design Software		Each	1	$13.99	$13.99

10. Emails will also be sent to yourself and the buyer when a requisition is declined or a portion of the requisition is declined. See sample below. Requisitions that have been declined can be copied in order to create a new requisition.

Creighton University

Requisition R90151 has been Declined

Requisition Approval Summary

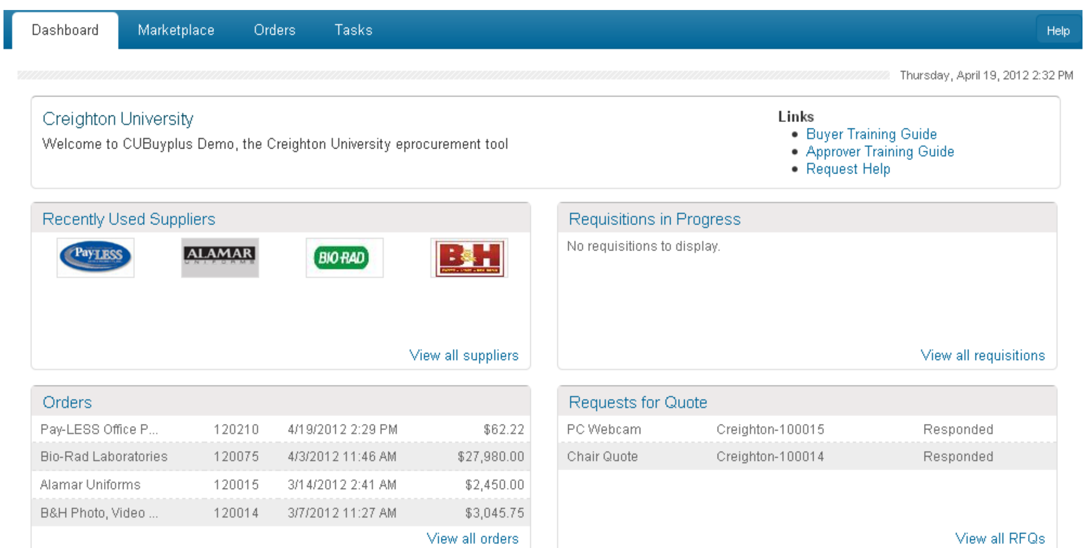
Description	Unit Price	Subtotal	Approval
Powershot 100 HS Digital ELPH Camera (Gray)	$139.95	$139.95	Declined

Shipping: $20.00
Total: $159.95

For full approval details please view the requisition in Unimarket.

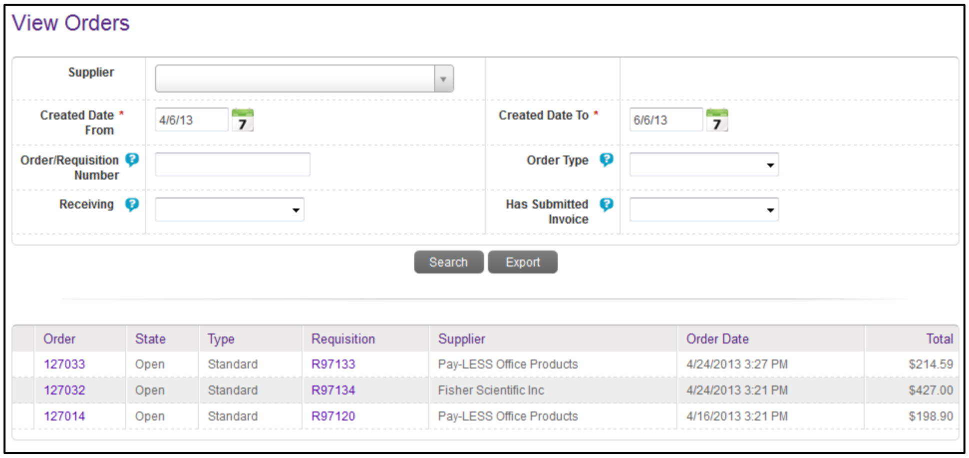
Viewing Orders

1. Click the **Dashboard tab.**
2. Orders that have been created can be viewed in the Orders area of the information section of the Dashboard.



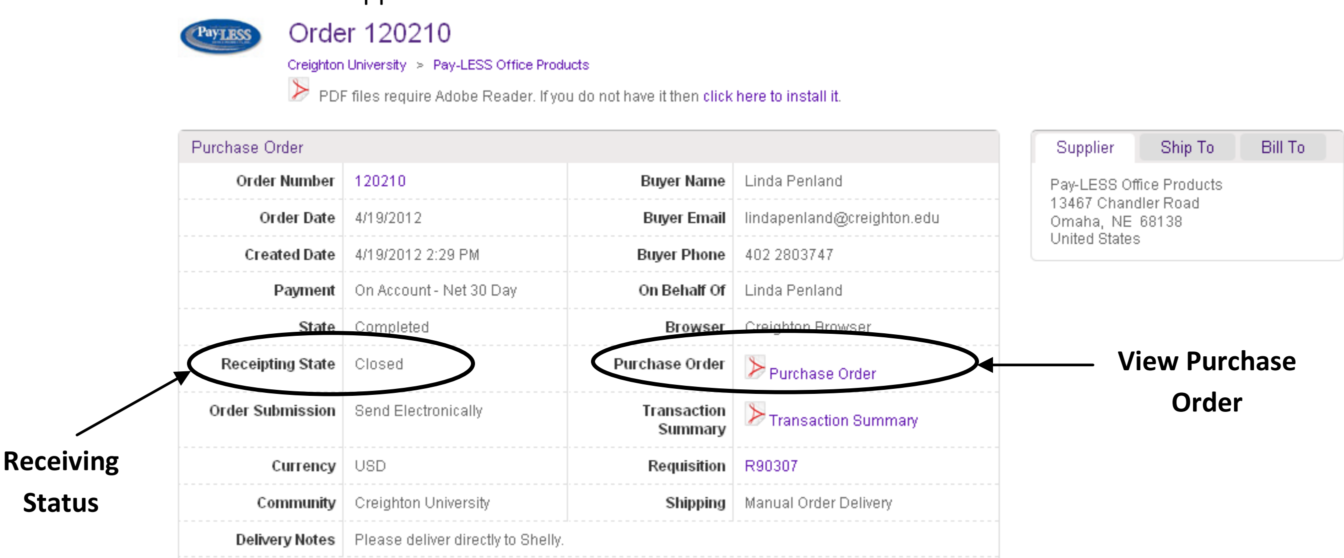
3. If the order is visible, click on the **order** from the list.
4. If the order is not visible, click **View all orders** to see all of your orders.
   a. The View Orders screen will appear.
   b. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and the click the **Search button**.
      i. **Supplier**
      ii. **Created Date From**
      iii. **Created Date To**

iv. **Order Requisition Number**
v. **Order Type**
vi. **Receiving**
vii. **Has Submitted Invoice**



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

5. The Order will appear.

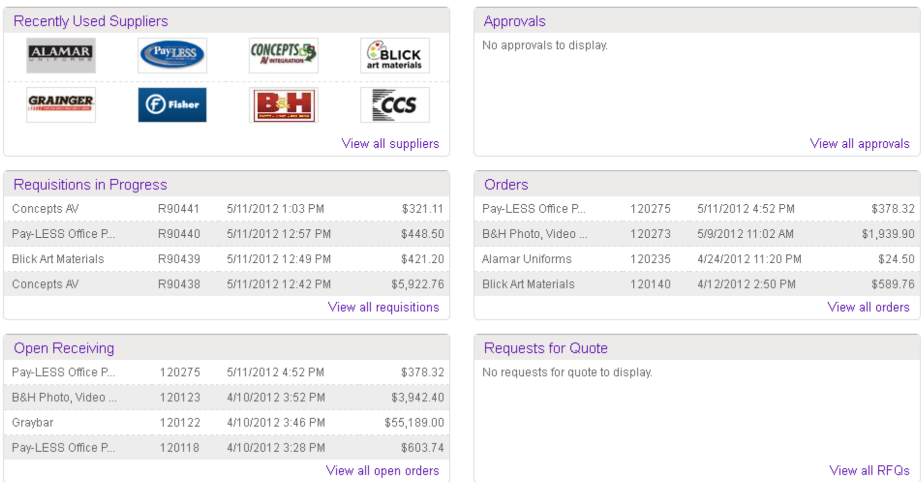


6. A copy of the purchase order can be viewed or generated at any time by clicking the **Purchase Order PDF** that appears in the top section of the order.
7. The receiving status is noted in the Purchase Order section at the top of the screen as well as with each individual item noted in the Items section. Possible receiving states include:
   a. **Open** – receiving has not been completed on order.
   b. **Partial** – receiving has been completed on some items on order but not all.
   c. **Closed** – receiving has been completed on order.

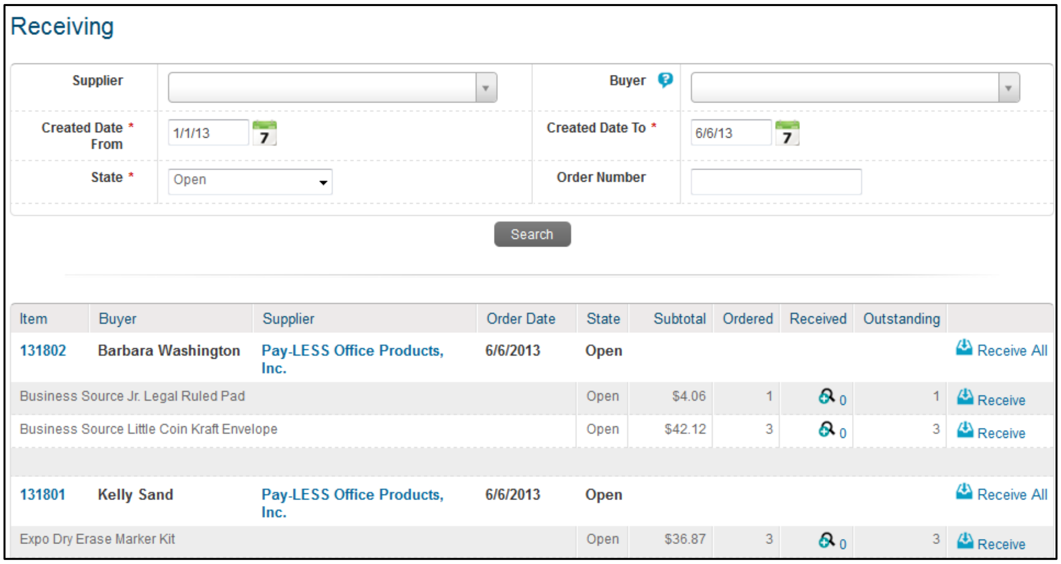
Receiving Orders

When an order is physically received, it must be received within CUBuyplus[R]. The entire order can be received or individual items. Complete the steps listed below to receive an order.

1. Click the **Dashboard tab.**
2. Orders that need to be received can be viewed in the Open Receiving area of the information section of the Dashboard.



3. If the order to be received is visible, click on the **order** from the list.
4. If the order is not visible, click **View all open orders** to see all of your orders.
   a. The Receiving 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 the click the **Search button**.
      i. **Supplier**
      ii. **Buyer**
      iii. **Created Date From**
      iv. **Created Date To**
      v. **State**
      vi. **Order Number**

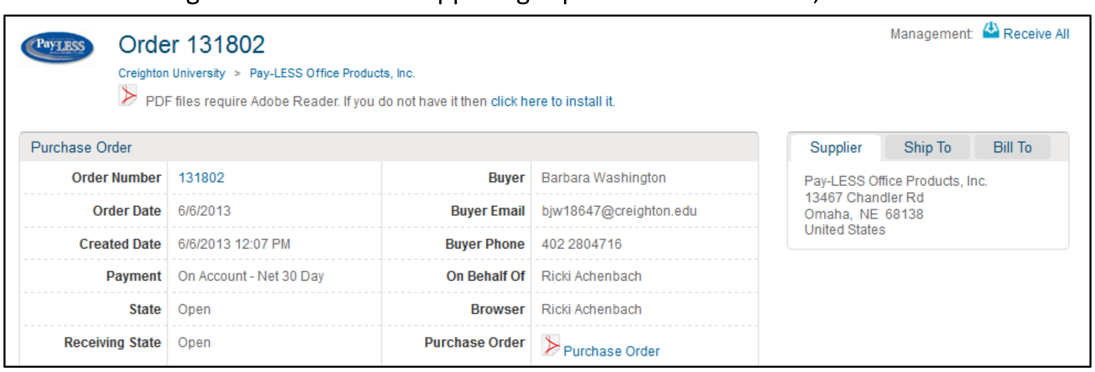


c. To select the order to be received, click on the **Order number** from the list.

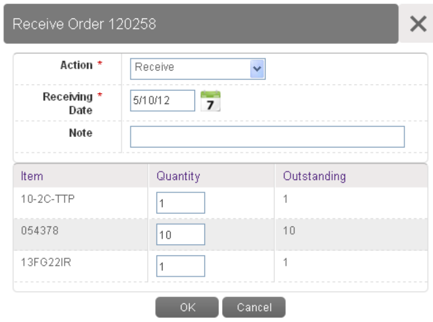
5. The order will appear. Depending upon if the entire order will be received or only certain items, complete the instructions in the appropriate section below.

Receiving the Entire Order

1. From the Management area of the upper right portion of the screen, click **Receive All.**



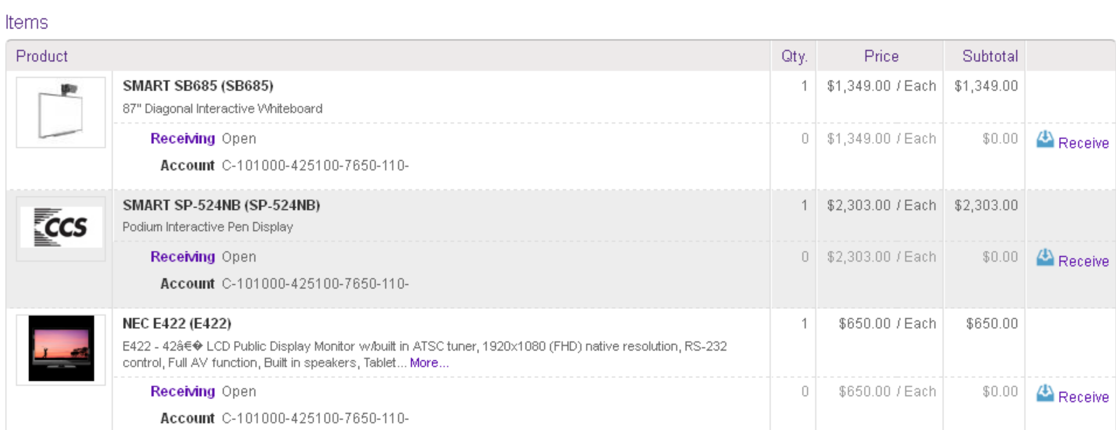
2. The Receive Order screen will appear.



3. If the Receiving Date is different than the current date, click the **Calendar icon** and select the **date** the order was received.
4. If there are any notes to make regarding the receipt of the order, type the ***notes*** in the Note field.
5. The quantity of each item that was ordered will appear in the Quantity column. Click **OK** to receive the entire order.
6. The Receiving State will now show closed.

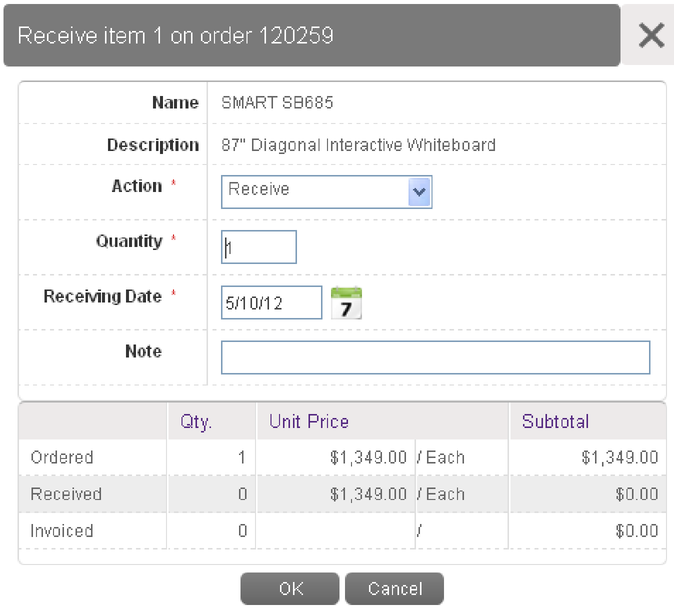
Receiving Individual Items on an Order

1. Scroll to the Items section of the order and locate the item to be received.



2. Click **Receive** for the appropriate item.

3. The Receive item x screen will appear.



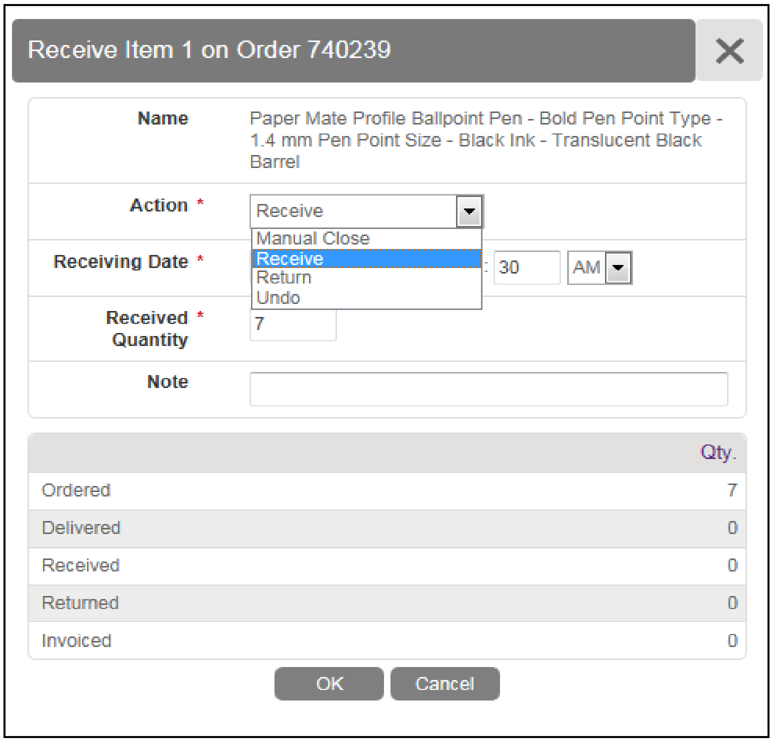
4. The Quantity field will automatically default to the quantity ordered. If the quantity received is less than the quantity ordered, type the ***number received*** in the Quantity field.
5. If the Receiving Date is different than the current date, click the **Calendar icon** and select the **date** the order was received.
6. If there are any notes to make regarding the receipt of the order, type the ***notes*** in the Note field.
7. Click **OK** to receive the item.
8. Receiving will now show closed for the individual item. The overall Receiving State will show Partial until all items on the order have been received.

Receiving Returns

There are four receiving options:

- **Manual Close** – use when item is no longer available and/or when the supplier has been notified item is no longer needed.
- **Receive** – use to document quantity that has been received.
- **Return** – use when an item has been returned.
- **Undo** – use when quantity received was entered incorrectly.

The Receiving sub-menu now shows an accounting of activity for an item.



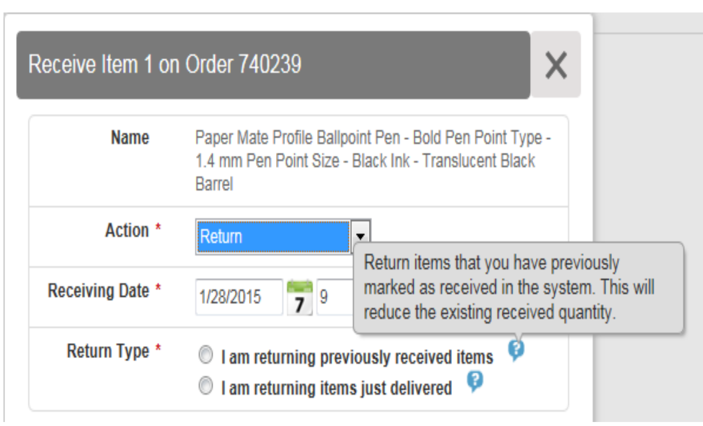
Types of Returns

- Returning previously received items:

  Return items that you have previously marked as received in the system. This will reduce the existing received quantity.

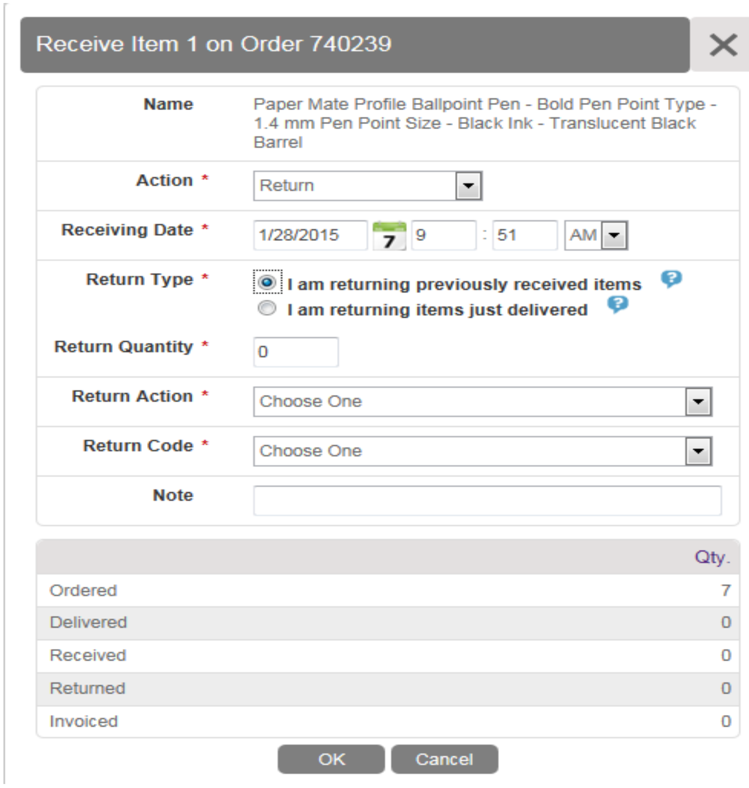
- Returning items just delivered:

  Return items that have just been delivered and have not yet been marked as received in the system. This will not reduce the existing received quantity.



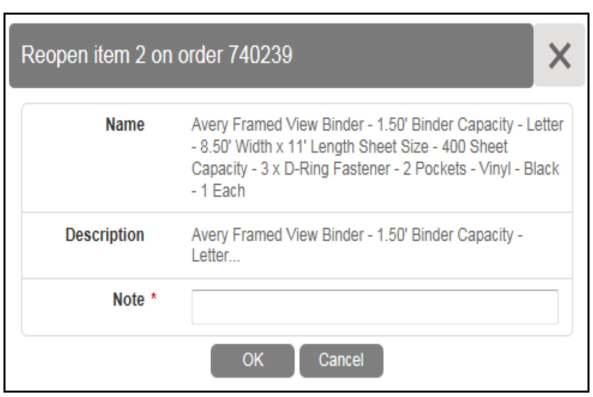
Fields to Complete

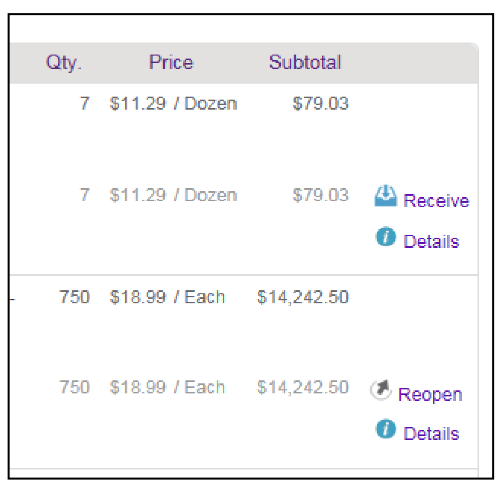
Return Action – Required – select from **Credit, Replace,** or **Return Only**.
Return Code – Required – select from **Damaged, Defective, Order Cancelled, Order Changed,** or **Other**.
Note field – not a required field, but highly recommended to add a note.



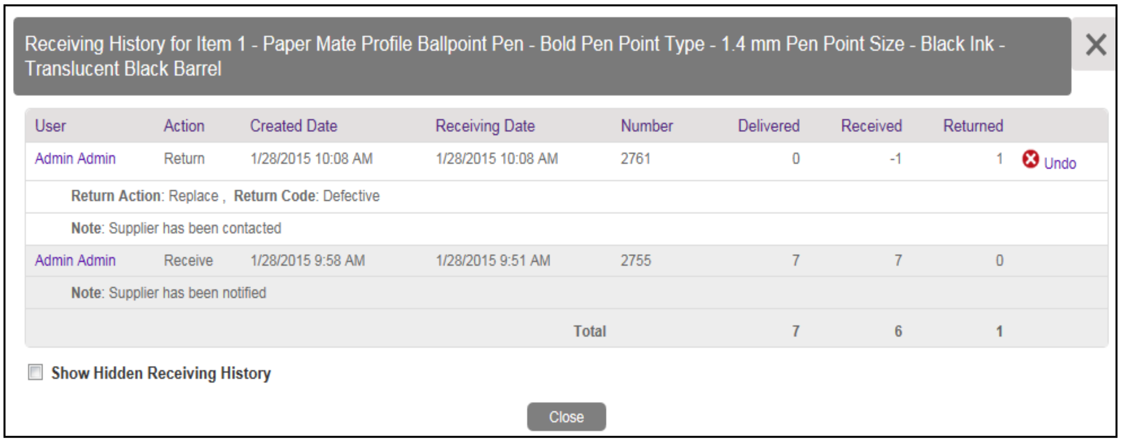
Processing a Return

1. Select **Reopen**. A note will be required to explain why receiving is being re-opened.
2. Status will return to **Receive.**





3. Receiving history will now show the new activity.

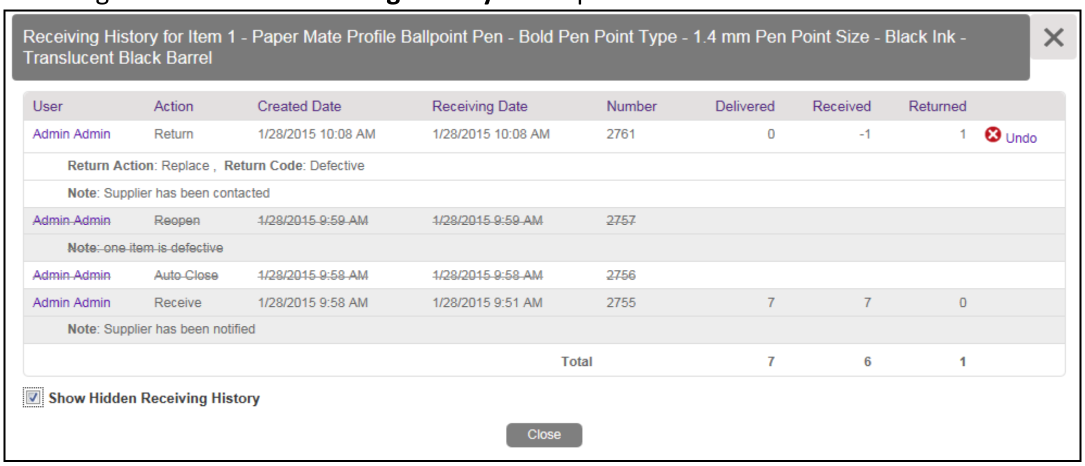

Receiving History for Item 1 - Paper Mate Profile Ballpoint Pen - Bold Pen Point Type - 1.4 mm Pen Point Size - Black Ink - Translucent Black Barrel

User	Action	Created Date	Receiving Date	Number	Delivered	Received	Returned	
Admin Admin	Return	1/28/2015 10:08 AM	1/28/2015 10:08 AM	2761	0	-1	1	Undo
Return Action: Replace , **Return Code**: Defective								
Note: Supplier has been contacted								
Admin Admin	Receive	1/28/2015 9:58 AM	1/28/2015 9:51 AM	2755	7	7	0	
Note: Supplier has been notified								
				Total	7	6	1	

Show Hidden Receiving History

Close

4. Selecting **Show Hidden Receiving History** will expand the details and show all actions in detail.


Receiving History for Item 1 - Paper Mate Profile Ballpoint Pen - Bold Pen Point Type - 1.4 mm Pen Point Size - Black Ink - Translucent Black Barrel

User	Action	Created Date	Receiving Date	Number	Delivered	Received	Returned	
Admin Admin	Return	1/28/2015 10:08 AM	1/28/2015 10:08 AM	2761	0	-1	1	Undo
Return Action: Replace , **Return Code**: Defective								
Note: Supplier has been contacted								
~~Admin Admin~~	~~Reopen~~	~~1/28/2015 9:59 AM~~	~~1/28/2015 9:59 AM~~	~~2757~~				
~~**Note**: one item is defective~~								
~~Admin Admin~~	~~Auto Close~~	~~1/28/2015 9:58 AM~~	~~1/28/2015 9:58 AM~~	~~2756~~				
Admin Admin	Receive	1/28/2015 9:58 AM	1/28/2015 9:51 AM	2755	7	7	0	
Note: Supplier has been notified								
				Total	7	6	1	

Show Hidden Receiving History

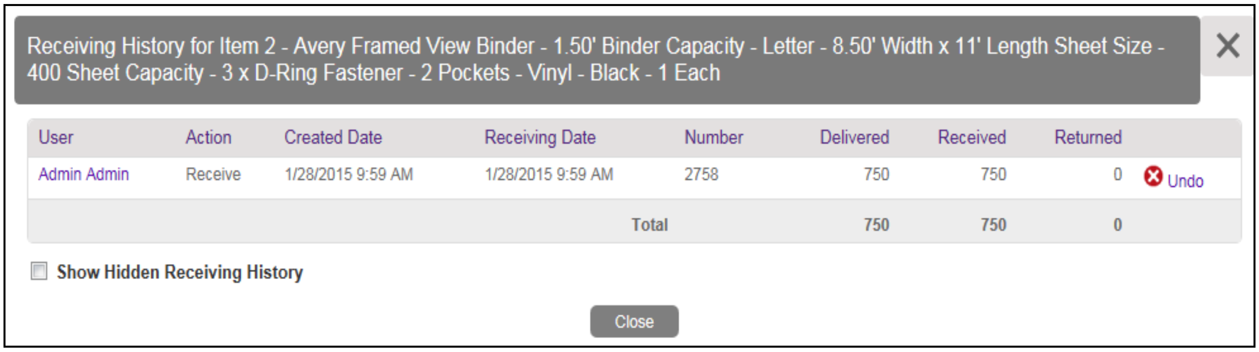
Close

<u>Important Notes when Returning:</u>

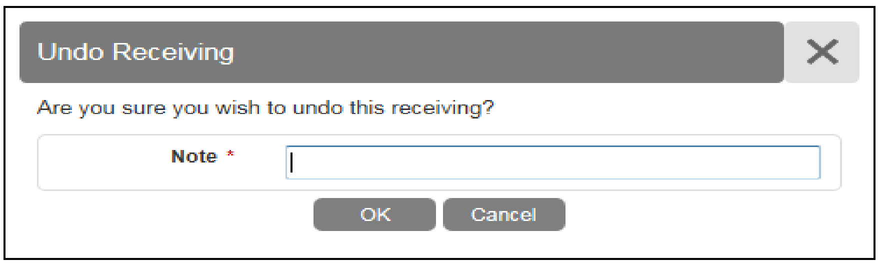
- No notification is sent to the supplier for a return <u>unless</u> an invoice has been submitted.
    - Notification is by email.
    - Recommend that users contact the Supplier to let them know a return is coming.
- Send BSC Specialist a note when a return is done
    - BSC will monitor the first few all the way through the process.

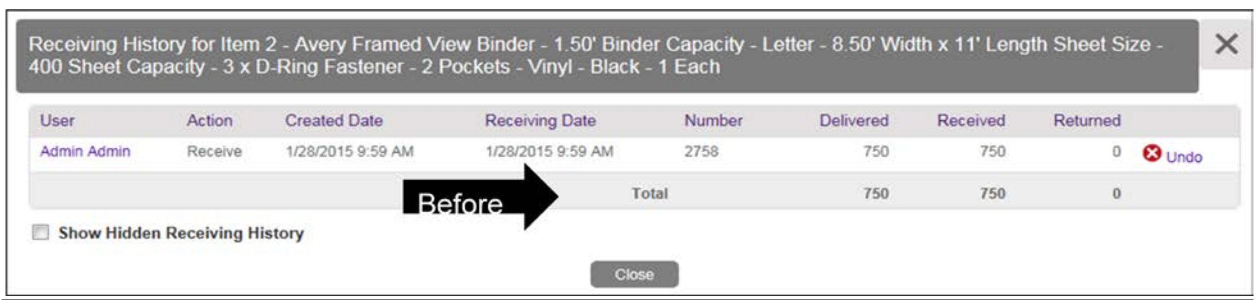
<u>Receiving – Undo</u>

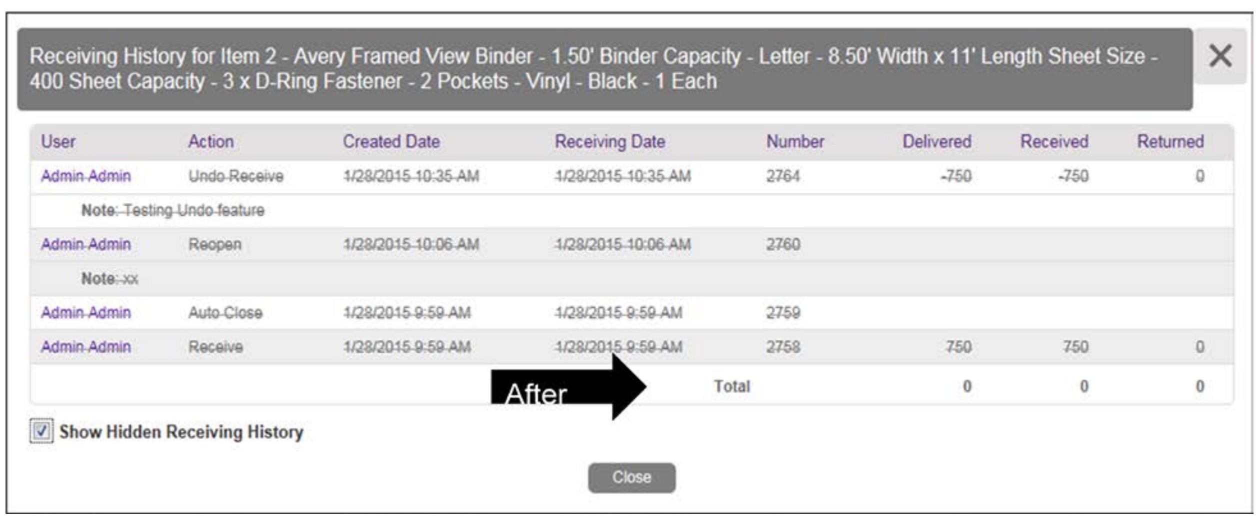
- Undo feature is located in the **Receiving History**.
- Provides ability to correct a previous Receiving action.
- When should it be used?
    - Error in quantity received.
    - Incorrect Action was selected, i.e. Receive instead of Manual Close



Selecting **Undo** will open a new menu and require a note.







Closing an Order

There may be situations in which an order needs to be closed after it has been placed or an entire order is not received and items must be manually closed. Complete the steps listed below to close an order

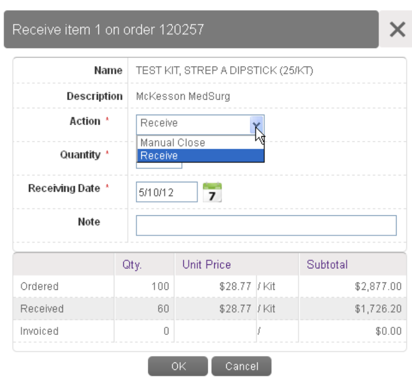
1. Click the **Dashboard tab**.
2. From the Opening Receiving section, locate the order to be closed.
3. Click on the **order** to be closed.
4. The order will appear. Depending upon if the entire order will be closed or only certain items, complete the instructions in the appropriate section below.

Closing the Entire Order

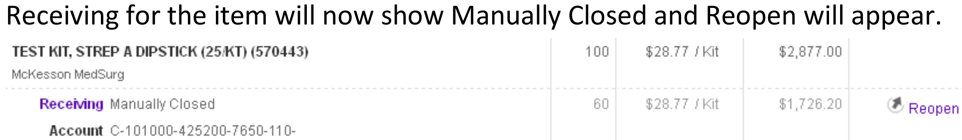
1. Notify your BSC Specialist when an entire order needs to be closed and provide an explanation.

Manually Closing an Item on an Order

1. Scroll to the Items section of the order and locate the item to be closed.
2. Click **Receive** for the appropriate item.
3. The Receive item x screen will appear.

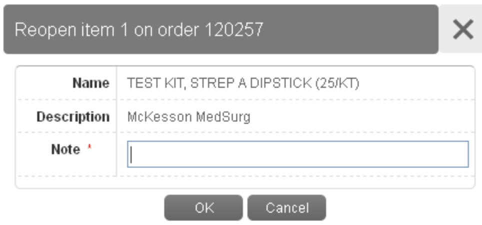


4. From the Action drop down, click **Manual Close**.
5. A warning message will appear letting you know that goods cannot be received and may prevent invoices from being matched.
6. The Note field will now be required. Type in an ***explanation*** for manually closing the item.
7. Click **OK**.
8. Receiving for the item will now show Manually Closed and Reopen will appear.



9. If the item later ships and needs to be received, click **Reopen**.

10. The Reopen item x screen will appear.



11. From the Note field, type a ***note*** explaining the situation.
12. Click **OK**.

13. The Receive option will now appear for the item allowing you to receive the additional quantity.