

How To Place An Order In

Gateway

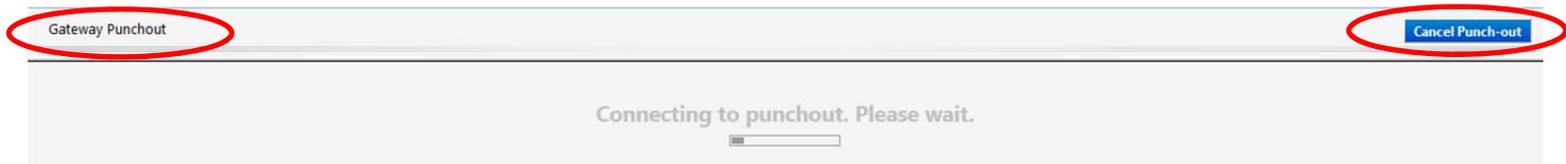


PUNCH-OUT ORDERING

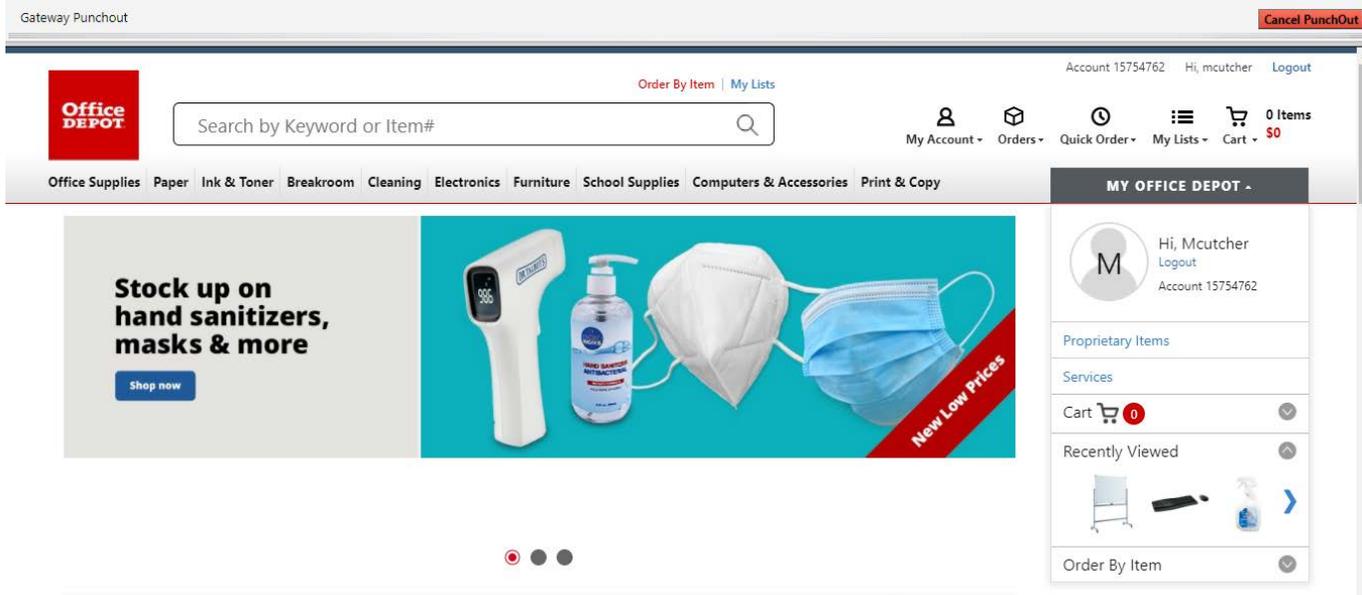
- Access to the punch-outs can be found on the homepage in Gateway. Punch-outs and Hosted Catalogs are mixed on the homepage, categorized by their applicable purchasing area. **Punch-outs can be distinguished by the small gray box with arrow in the right hand corner of the supplier's tile.**



- To access the supplier's punch-out, click the desired supplier's tile.
 - Please note that some supplier's will ask for a small amount of user information when punching out for the first time.
- Clicking the tile will transfer you to the supplier's hosted website.
 - It is important to make sure that you see the "Gateway Punchout" bar across the top of your screen, as well as the "Cancel Punch-out" button on the right. You can always use the "Cancel Punch-out" button to get back into Gateway.



- Once you are connected to the supplier's website, you are able to search and shop for desired goods.



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- Search for the desired good(s), select the quantity needed and “Add to Cart”.

Showing 255 results for 'sharpies'

Were you looking for? [Sharpie Pens](#), [Sharpie Markers](#), [Sharpie Highlighters](#)

By

10) 

Item 203349 ●
★★★★★ 1110 Reviews
Sharpie® Fine Point Permanent Markers, Gray Barrel, Black Ink, Pack Of 12

Availability: 5,150
✓ Sold Online
✓ Sold in Stores
✓ Best Value
Eco Eco-conscious
▶ Safety Data Sheets

Qty

\$6.66 / dozen

- When the items are successfully added to the cart and the user is done shopping, click “Checkout”. This will transfer the items and cart information back into Gateway to complete the ordering process.

The item listed below was added to your shopping cart.

Description	Your Price/unit	Qty.
 Sharpie® Fine Point Permanent Markers, Gray Barrel, Black Ink, Pack Of 12 Item # 203349 Entered Item # 203349 <input type="button" value="Go Greener"/> <input type="button" value="View GreenerOffice alternatives"/> Best Value Eco Eco-conscious	\$6.66 /dozen	2

[Continue Shopping](#)

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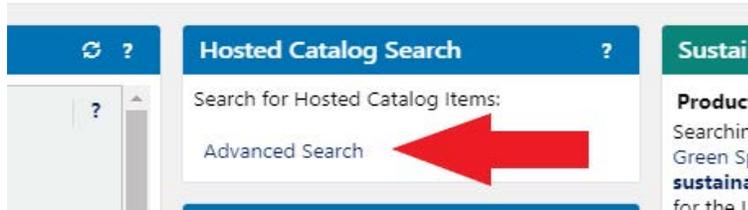
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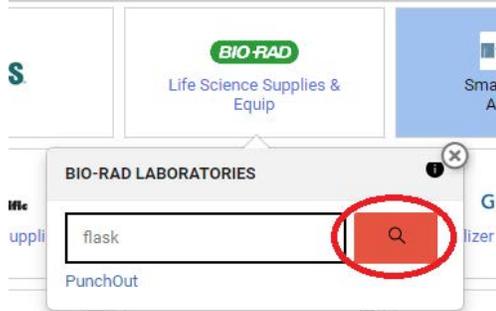
HOSTED CATALOG ORDERING

- Hosted Catalogs can be shopped three ways:

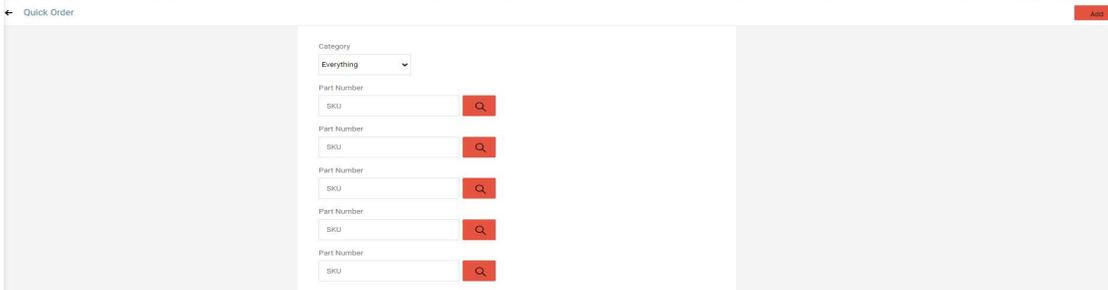
1. By using the "Hosted Catalog Search" function on the homepage. This will search through all of the Hosted Catalogs in the system at once which is a great option if a user would like to compare prices across suppliers.



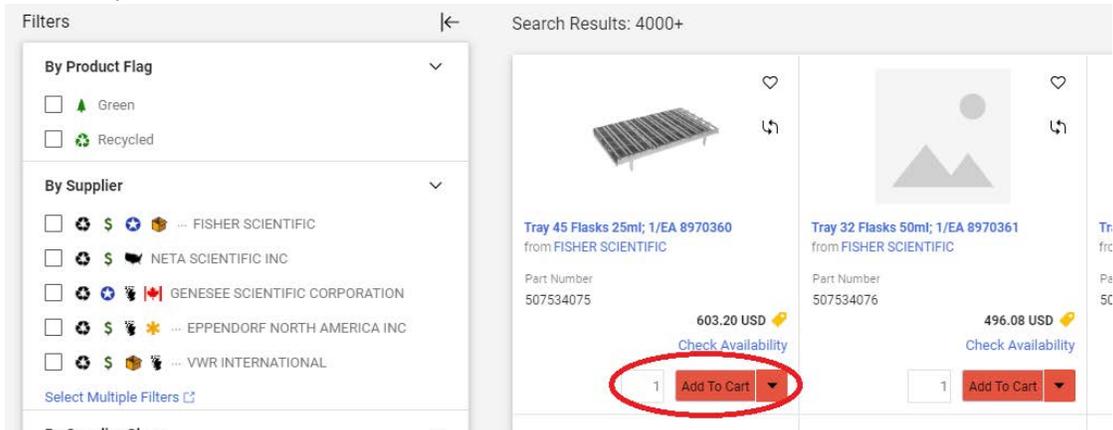
2. By accessing a specific supplier's tile from the homepage and utilizing the *supplier specific search bar*. This will only search the single Hosted Catalog.



3. By using the *Quick Order function*, located as a link under the "Hosted Catalog Advanced Search" function. If a user has access to a supplier's SKU numbers, the quick order function can be used to quickly put an order through.



- Once a search has been entered, users can filter their results using the left hand menu. This menu will appear when searching using either method for Hosted Catalogs.
- Much like the punch-outs, *simply enter your quantity and "Add to Cart"*. This will update your Gateway shopping cart with your items.



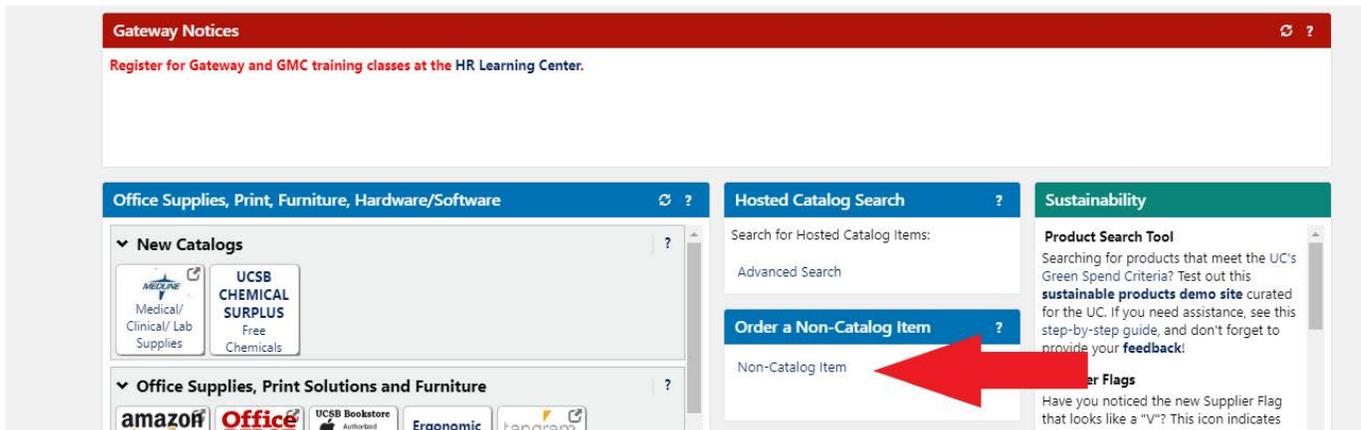
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NON-CATALOG ORDERING

- Most of the supplier's in the system are non-catalog, which will require users to verify their pricing outside of the system in the form of a quote or searching of the supplier's website or catalog.
- Once pricing is confirmed with the supplier, users can select the **non-catalog link** under the "Hosted Catalog Search" to build their cart in the system.



- This link will bring up a dialogue box that will let users build a cart based on their verified pricing information.
 - The supplier needs to be enabled in the system before the user will be able to successfully use this form.
 - A Catalog No. needs to be entered. If there is not one, we suggest using "N/A".

The screenshot shows the 'Add Non-Catalog Item' dialog box. It has a dark blue header with the title and a close button. Below the header is a section for 'Existing Supplier' with a search box labeled 'Select Supplier'. Underneath is an 'Item' section with a table-like structure. The table has columns for 'Product Description', 'Catalog No.', 'Quantity', 'Price Estimate', and 'Packaging'. The 'Packaging' column has a dropdown menu currently set to 'EA - Each'. Below the table is a '254 characters remaining' indicator. At the bottom of the dialog are three buttons: 'Save', 'Save And Add Another', and 'Close'. A legend indicates that stars next to field names denote required fields.

- "Save" will give the user a single line in the purchase order.
- "Save and Add Another" will save the current information and give the user additional lines for their order.
- When finished adding pricing information, select "Close". This will add all of the entered information into the active shopping cart.

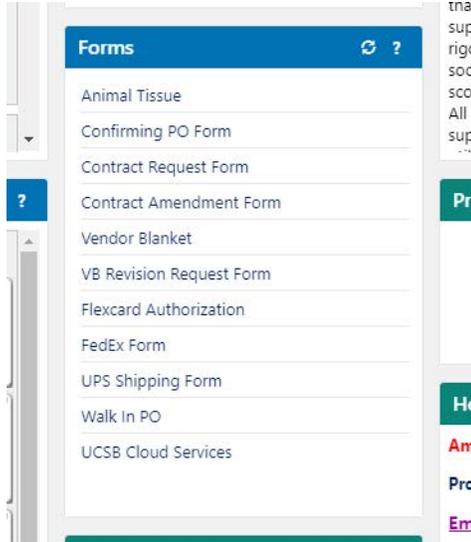
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FORM ORDERING

- Forms are to be used for specialty purchasing situations in the system. Each form is set up according to different needs for system users for the purchase of specific goods or services.
- Users can access forms on the homepage, by clicking on the desired form name.



- After filling out the information on the Form, select “Add and go to Cart” in the upper right corner of the form. This will add the Form to the user’s active cart.
 - Forms cannot be mixed with punch-out, hosted catalog or non-catalog items. They will need to be in their own cart.
 - Users can add more than one of the same Form to their cart in order to create more than one line item if needed in their cart. Many times this is seen when users need a line as taxable, the other as non-taxable, all on the same order.

Form • Walk In PO Close **Add And Go To Cart**



Customer Information	Supplier Information
Full Name: * <input type="text" value="Melia Cutcher"/>	Existing Supplier
Phone Number: * <input type="text" value="805-893-4360"/>	Supplier * <input type="text" value="AQUA-FLO SUPPLY"/>
How are these items used in your research (N/A)? <input type="text" value="Irrigation supplies for fieldwork."/>	Fulfillment Address <input type="text" value="F01
30 S. LA PATERA RD
UNIT 10
GOLETA, California 93117 United States"/>
<small>216 characters remaining expand clear</small>	Supplier Phone <input type="text" value="+1 805-967-2374"/>

Walk-In Purchase Order Instructions	Order Information
<small>The Walk-In Purchase Order is ONLY used when physically walking into a supplier's store to pick up goods. Once approved in Gateway, the PO will not be sent to the supplier. Therefore, you must print out a copy of the PO and bring it into the store.</small>	Description of Items * <input type="text" value="Hoses and drip emitters."/>
	<small>226 characters remaining expand clear</small>

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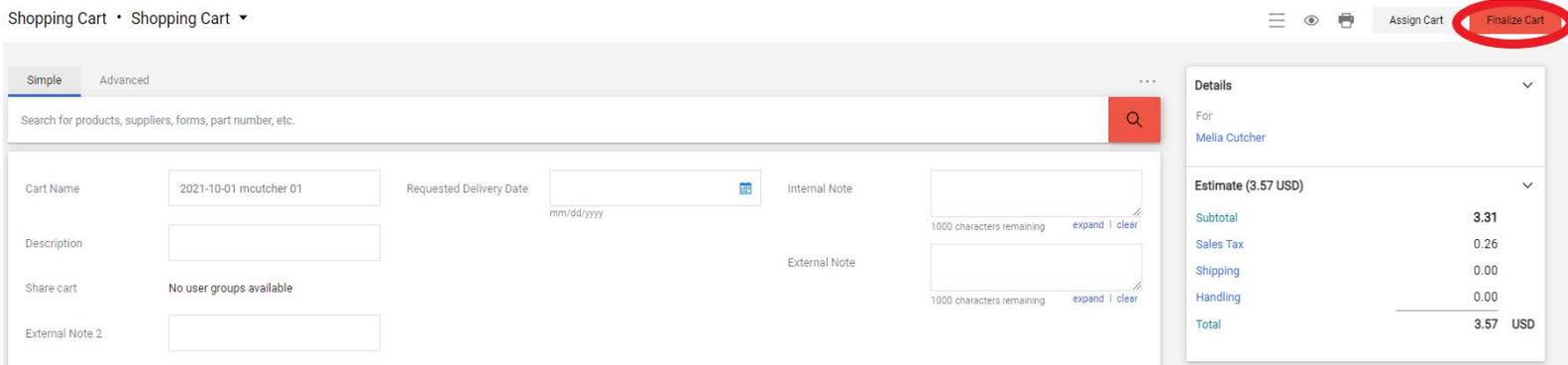


FINALIZING YOUR ORDER – CHECKOUT

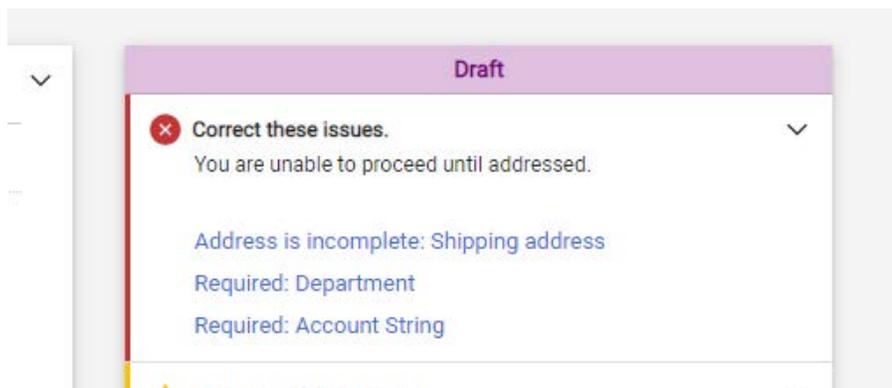
- Once you have all of your desired goods in your cart, you can quickly access your cart by clicking the shopping cart icon on the upper right hand side of the screen.



- To finalize your order and submit it through workflow for approval, all of your items in the active cart need to be from one supplier.
 - The purchase order number is a contract between the University and the supplier; we cannot send the same purchase order number to more than one supplier.
 - Users can have as many draft carts as needed to accomplish this.
 - If items from different suppliers need to be moved to a separate cart, check the box next to the line item and select “Move to Another Cart” from the available actions drop down menu.
- Select the “Finalize Cart” button to review and input order information.



- In the Finalize Cart section, users will be brought to the Requisition Summary screen to enter in Ship-To Information, Account Code information, and any other specific information that is important for the specific order.
- The Review Steps on the right side of the screen provide links to specific areas on the requisition that need to be completed before the requisition can be submitted.



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○ Addresses:

- The Ship-to address needs to be updated before the order is complete. Search for the proper address using the search feature in the Edit Addresses section.

MSII - [ATTN:*], [Room No.], Marine Science Institute, Bldg 520 Rm 4001 FL 4L, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII Marine BioTech - [ATTN:*], [Room No.], Marine BioTech, Bldg 555, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII NCEAS - [ATTN:*], [Room No.], NCEAS, 735 State Street Suite 300, Santa Barbara, CA 93101-5065, United States

MSII SNARL - [ATTN:*], [Room No.], SNARL, 1016 Mount Morrison Road, Mammoth Lakes, CA 93546, United States

MSII SONGS - [ATTN:*], [Room No.], SONGS, 2270 Camino Vida Roble - D, Carlsbad, CA 92011, United States

MSII TRAILERS - [ATTN:*], [Room No.], MSI Trailers, Trailer 334, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII - Receiving - [ATTN:*], [Room No.], Central Stores, Bldg 507, Mesa Rd, University of California, Santa Barbara, Santa Barbara, CA 93106-6150, United States

MSII | Results Per Page 10

- Search for either a 4-digit department code (Ex: MSII) or “ONE” to get a one-time ship to address feature. Select the corresponding address and enter in user detail information for the order.
 - Users also have the option to “Add to my addresses” for future use.

Ship To ★

CURRENT ADDRESS

ATTN: * Add to my addresses

Room No.

Address Line 1 Marine Science Institute

Address Line 2 Bldg 520 Rm 4001 FL 4L

Address Line 3 University of California, Santa Barbara

City Santa Barbara

State (2 character ab) CA

Zip Code 93106-6150

Country United States

○ Account Codes:

- The accounting code that will be used for the purchase needs to be inputted before the order can be submitted.

Edit Accounting Codes

Account Code

Department *	Account String *	Sub Account	Cost Type	Fund Type	Award Type	Award End Date Within 90 Days	Award End Date	Account Group Code
MSII	<input type="text"/>	<input type="text"/>	<input type="text"/>	No Value	No Value	No Value	No Value	No Value

MSII - MARINE SCIENCE INSTITUTE

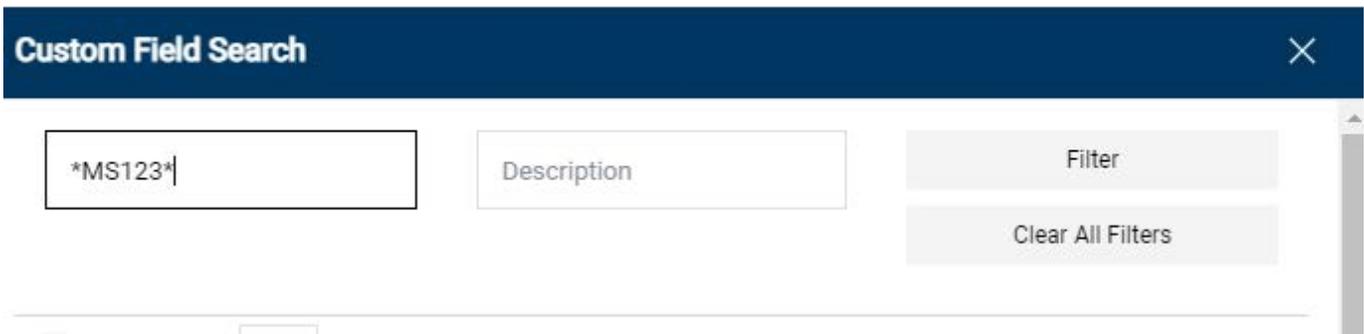
- Always start with the Department section first. Search using MSI's 4-digit departmental code: MSII.

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- Once that code is entered, you can move on to the Account String section.
 - Click the magnifying glass to bring up the Custom Field Search box to search for a specific account string.
 - In the "value" section of the search box, you should use asterisks around your search term to find your string. Common searches are either the account string or project code. Ex. *8-123456-78900* or *MS123*



The screenshot shows a 'Custom Field Search' dialog box with a dark blue header. Inside, there is a search input field containing '*MS123*', a 'Description' field, and two buttons: 'Filter' and 'Clear All Filters'. A close button (X) is in the top right corner.

- Please note: the sub account does not need to be entered before the cart can be submitted. MSI's Purchasing team will complete this section.
-
- **Other Requisition Details:**
 - There are other areas of the requisition summary that users can input addition information into for their order.
 - The **Notes and Attachments** section can be used to attach documents to send to the supplier via the External Notes and Attachments section. This is a great section to attach quotes. Internal Notes and Attachments are used for departments that would like to keep a record of any document that pertains to the purchase order.
 - The **Equipment Management** section is required for any equipment purchase.
 - The **Purchase Details** section is where departments can mark their order as restricted, include Work Order Information and include Special Handling Information.

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Notes and Attachments	Equipment Management	Purchase Details
Internal Notes and Attachments Internal Note <i>no note</i> Internal Attachments add attachment... Supplier Notes & Attachments External Note <i>no note</i> External Attachments add attachment... Supplier Account Number <i>no value</i>	Equipment Information Inventory Equipment? <i>no value</i> Custody Code <i>no value</i> Title Vests with? <i>no value</i> Add-On to Property No. <i>no value</i> Location <i>no value</i> Fabrication Information Fabrication? <i>no value</i> Fabrication Name <i>no value</i> Fabrication Property No. <i>no value</i> Fabrication ID No. <i>no value</i>	Purchase Type Type of Purchase <i>no value</i> Restricted Items Restricted Items <i>no value</i> Work Order Information Work Order No. <i>no value</i> Work Order Building <i>no value</i> Location Special Handling Special Handling <i>no value</i>

- **“Submit requisition”** if there are no other changes that need to be made. This will route your order through departmental workflow for approval and eventual distribution to the supplier.