**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.
How To Place An Order In Gateway

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

- 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.
How To Place An Order In
Gateway

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.

  ![Hosted Catalog Search](image1)

  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.

  ![Supplier Specific Search](image2)

  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.

  ![Quick Order Function](image3)

- 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.*
How To Place An Order In

Gateway

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”.

  - “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.
How To Place An Order In Gateway

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.
**How To Place An Order In**

**Gateway**

**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.
How To Place An Order In Gateway

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.

- 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.

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

- Always start with the Department section first. Search using MSI's 4-digit departmental code: MSII.
How To Place An Order In

Gateway

- 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*

- 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.


“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.