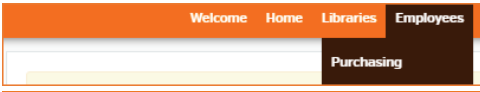


# Shopper Training Guide

## Catalog/Punchout Suppliers

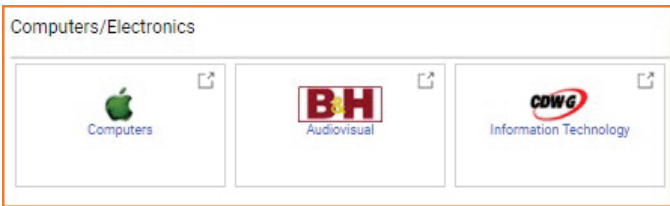
Log in to myBGSU. Click on the Employees tab > Purchasing. Click on the BGSU Falcons Purch logo.



The first page of the shopping experience displays a search field and punchout catalogs.

### Punchout Catalogs

Punchout catalog suppliers have provided stores within Falcons Purch that will allow users to shop from the supplier's external website. The shopping cart created will generate a cart in Falcon's Purch for approvals and budget information.



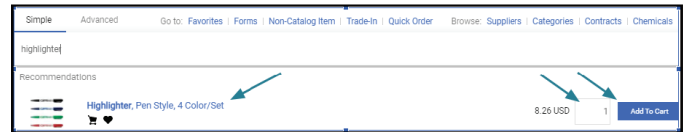
### Hosted Catalogs

Hosted catalog suppliers provide searchable catalogs of contracted goods and services offered by suppliers within the Falcons Purch site for easy searching and entry of orders.

In the search field, users enter key words for the items to purchase, then click the search icon. Users can search for contracted items in the shopping search bar. Simple and Advanced tabs along the top of the search field allows users to toggle between simple and advanced search pages.



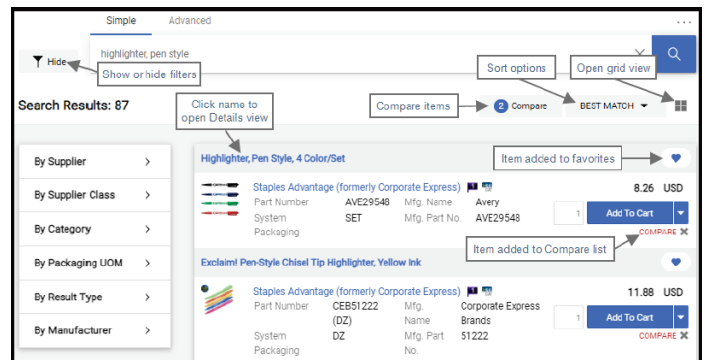
Click the Search icon to generate a search. An Add To Cart button allows users to add an item or request directly to their cart. An Add and Checkout option on the drop-down menu will take users directly to the Checkout/Requisition



### Search Results

Items that match the search criteria are displayed on the search results page. On this page users can:

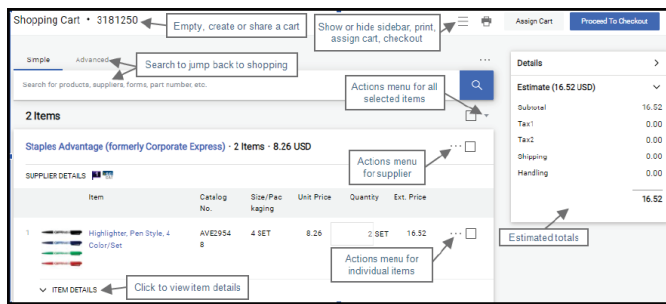
- Search for additional items using the search field at the top of the page.
- Apply multiple search filters in the left sidebar to narrow search results.
- Choose different sorting preferences from the BEST MATCH menu.
- Click on an item to display product details.
- Compare products.
- Add items to their Favorites.



## Cart

The shopping cart contains items a user has selected to purchase. Users can add or remove items, change commodity codes, adjust quantities, and view an estimated total purchase amount.

All goods, services, forms must be added to the shopping cart for processing. The cart must be submitted after all items are added to the cart. If multiple vendor purchases are added to the cart, the system will separate the orders as needed when distributing to the suppliers.

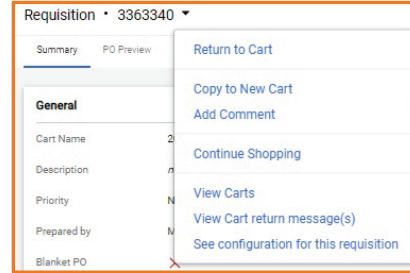


## Proceed to Checkout



The checkout action creates the purchase requisition. The purchase requisition allows someone with the requester role to add cart fields, comments, attachments, make edits and place the order.

Tabs at the top of the page contain additional information about the document. Items are listed in the bottom section.

Document actions are available in the top left corner of the page. Click the drop-down menu next to the requisition number to see a list of actions that can be taken for the document.




Other actions are available in the top right corner of the page:

-  Show or hide the right sidebar.
-  Select an option from the Filter View drop-down menu to view individual sections on the page.

For example, view header details only, view line items only, or view billing details only.

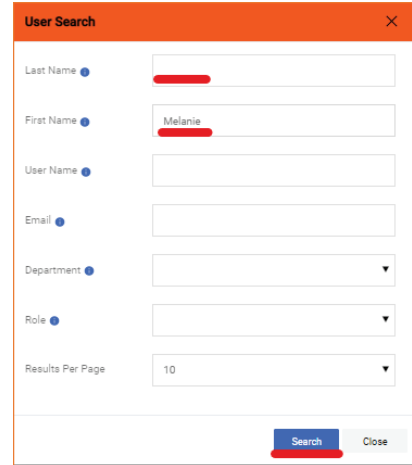
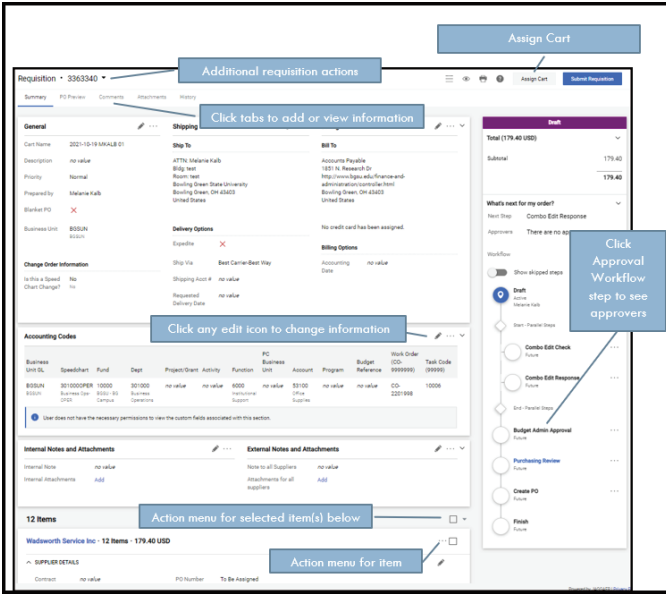
In the Line Items section, the actions menu for all selected items is the drop-down menu at the top right corner of the section. On individual items, click the action icon to see actions that can be applied to that item only.

Click tabs to view and  edit information within them. Click the edit icon to modify information in a section.

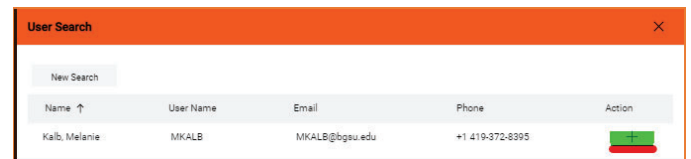
The right sidebar shows document totals and workflow. The document status and any messages are displayed near the top of the section. Users can view approval workflow information in the [What's next for my order?](#) section.

Select one of the action buttons to go to the next step.

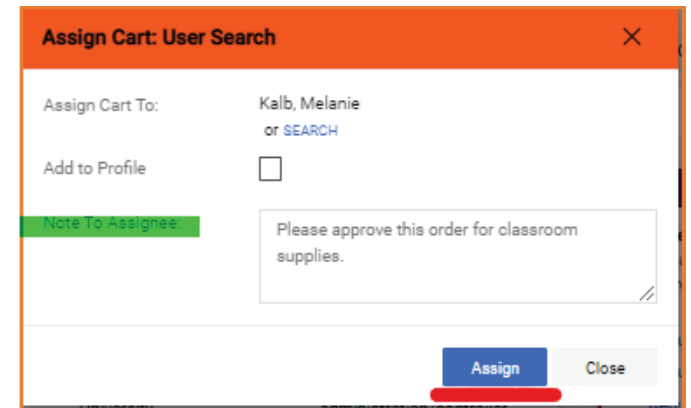




Select the + action to assign the cart to the correct User.



Type a note to the assignee. Click Assign.



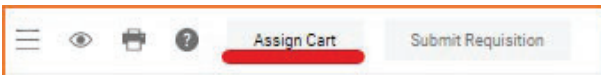
### Submitted Requisitions

Submitted Requisitions are displayed in a document configuration that is like the Checkout page.

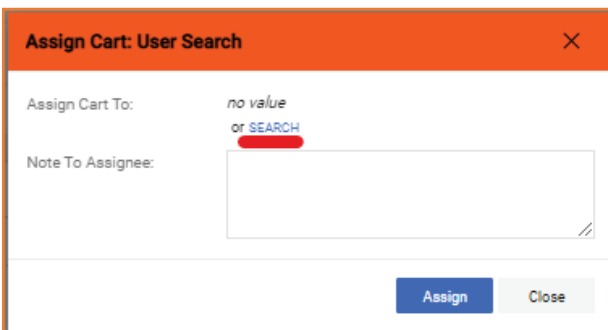
### Assign Cart to Another User

Users that have the shopper role will only be able to assign the cart to a user that has a requestor role to place the order with the proper chart codes.

Select Assign Cart.



Search for a User. Click Search.



Type the first/last name of the person you would like to assign the cart to for order processing. Click Search.

Requisition • 3181250

Summary Taxes/SSH Comments Attachments History

General	Shipping	Billing
<b>Status</b> ✓ Completed (7/19/2021 5:58 PM) <b>Purchase Order</b> 2695634 view   print <b>Submitted</b> 7/19/2021 5:57 PM <b>Cart Name</b> 2021-07-19 bwilson 01 <b>Description</b> no value <b>Prepared by</b> Brynn Wilson <b>PO Clauses</b> View details <b>Tax Code</b> no value	<b>Ship To</b> Attn: Brynn Wilson Department 3020 Carrington Mill Blvd Suite 100 Morrisville, NC 27560 United States <b>Delivery Options</b> Expedite X Ship Via Best Carrier-Best Way	<b>Bill To</b> Contact Line 1: Brynn Wilson 6501 Weston Parkway Cary, NC 27513 United States <b>Credit Card Info</b> No credit card has been assigned.

Accounting Codes

Internal Notes and ... External Notes and... Additional Notes

2 Items

Staples Advantage (formerly Corporate Express) - 2 Items - 16.52 USD







Click to open related documents

Total (16.52 USD)  
 Subtotal 16.52  
 Tax1 0.00  
 Tax2 0.00  
 Shipping 0.00  
 Handling 0.00  
 16.52

Related Documents  
 Purchase Order: 2695634

What's next?  
 Workflow  
 Show skipped steps  
 Submitted  
 7/19/2021 5:57 PM  
 Brynn Wilson  
 Order Consolidation  
 Approved  
 Brynn Wilson  
 Spend Collection-Check Robot  
 Completed

## Icons

- \*\*\* Click to display actions for items in a panel or page
-  Click to edit information
-  Collapse section
-  or  Expand section
-  Click to add an item to Favorites
-  Item is a user's personal Favorite