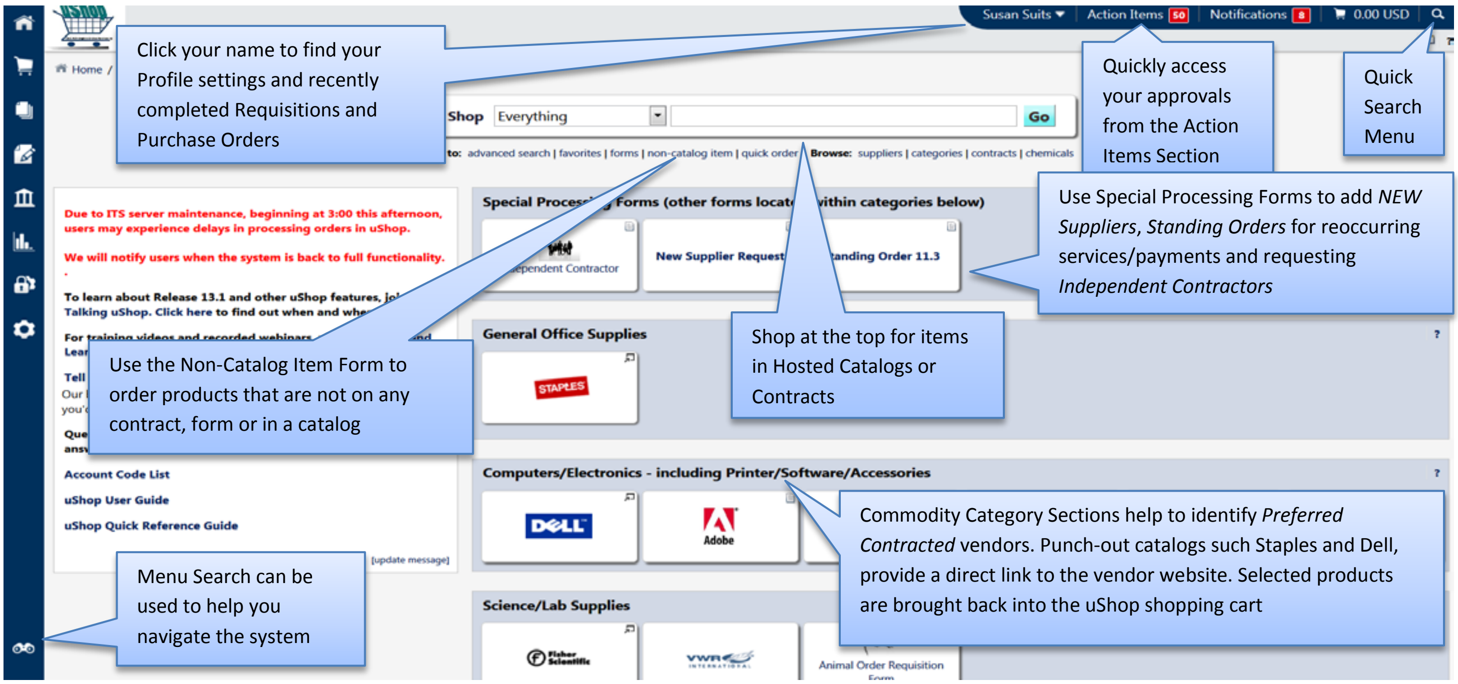
uShop

Quick Reference Guide

- Home Shop Screen
- Shop Menu
- Orders and Documents Menu
- Contract Search Menu
- Accounts Payable Menu
- Site Administration Menu

Logging into uShop:

- **From the UNCW Home page, Select Faculty & Staff**
- **mySeaport (log in using your credentials)**
- **Click the Administrative Services tab (yes to display non secure items if you get that message)**
- **Click uShop link**



1) Getting Started

CHANGE EMAIL/NOTIFICATION PREFERENCES

- Click **Dropdown arrow** beside your name
- Click **View My Profile**
- Click **Email Preferences**
- Use the dropdown menus beside each email preference type to choose, email, email and notification, notification or none, as applicable.
- Click **Save**

STORE DEFAULT SHIPPING ADDRESS

- Click **View my Profile** from dropdown menu beside your name
- Click **Default Addresses**
- Click **Ship to** tab
- Click **Select Addresses** for Profile
- Search for address by typing in the building code, name or street name
- Choose address – type in Bldg-Rm
- Check box Default and **Save**

2) Placing Orders

SHOP AT THE TOP

- From **Home** page, **Shop at the Top**
- Enter Keywords in text box, Click **Search**
- OR Browse by Contract, Category, etc
- Click chosen items and **Add to Cart**
- Follow *Complete an Order* Instructions below

-OR-

PUNCH-OUT CATLOGS

- From **Home** page, click supplier icon sticker to begin session
- Search in suppliers catalog and add to suppliers shopping cart
- Follow suppliers check out procedures to confirm order and return items to uShop shopping cart
- Follow *Complete an Order* Instructions

-OR-

NON-CATALOG ITEM FORM

- From the **Home** page, click non-catalog item
- Click **Supplier Search** – enter supplier name
- Select appropriate supplier
- Enter product information including product number and complete description
- Click **Save and Close** or **Save and Add** Another if adding more items from the same vendor
- Follow *Complete an Order* instructions

COMPLETE AN ORDER

- Choose the cart to check out by going to **Carts Icon– My Carts and Orders** – Click on **View Draft Carts**
- Click **Proceed to Check Out**
- Click **Final Review**
- Add Accounting Codes, ship to address, notes and attachments as needed
- If Requestor, Click **Place Order**
- OR if Shopper, click **Assign Cart** and choose assignee from the **Search for an assignee** link
- Add note to assignee and click **Assign** button

NEED HELP?

If you need help using uShop, please contact Susan Suits at 962-3400 or email at suitss@uncw.edu

3) Accounting Splits

AT THE HEADER LEVEL – Code affects all lines of PO

- On the draft requisition, click **Final Review**
- Scroll down to Accounting Code section and click **Edit** button
- Click **add split** link
- Enter the appropriate Fund and Account codes for each FOPA
- Select the type of split from the dropdown menu
- Enter value of the split
- Click **recalculate/validate** link
- Click **Save**

AT THE LINE LEVEL – To override code for particular lines of the PO

- On the draft requisition, click **Final Review**
- Scroll to the Accounting Codes section and click View/edit by line item link (bottom right of Accounting box)
- Scroll to the line item requiring the split and click **edit** button
- Enter the appropriate Account and Fund for the line
- Click **recalculate/validate** link
- Click **Save**

ACROSS DEPARTMENTS – when departments are sharing the cost of an order

Requestor A: Creates Cart

- Create cart and click **Proceed to Checkout**
- Click **Final Review**
- Enter Accounting information
- Click **Save**
- Click **Assign Cart** – choose Requestor B as the assignee

Requestor B: Completes split

- From Navigation tabs, choose **Carts** – **Draft Carts** – Carts assigned to me
- Open Cart and **Proceed to Checkout**
- Click **Final Review**
- Scroll to Accounting Code section, click **edit**
- Click **add split** link
- Enter second fund and account code
- Apply appropriate type of split from the dropdown menu
- Click **recalculate/validate** link
- Click **Save**
- From **Final Review** screen, click **Assign Cart** – Choose Carol Page as assignee

4) Finding an Order

RECENTLY COMPLETED – LAST 90 DAYS

- From Home/Shop Page – **Dropdown Menu** beside your name
- Click **Recently Completed** – **Purchase Orders** or **Requisitions**
- Click the **document number** (Requisition Number or Purchase order number) to open

QUICK SEARCH

- From Home/Shop Screen – Upper right hand corner magnify glass **Quick Search Menu**
- Use dropdown menu to choose the document type
- Tab to search field
- Type in the **document number**
- Press **Go** button

DOCUMENT SEARCH

Simple Search

- From Home/Shop Screen, click **Orders and Documents Menu** icon from main navigation ribbon then **Search Documents**
- Choose **Document type** from dropdown menu or search all documents
- Choose Dates to search from dropdown menu or search all dates
- Enter **search terms** in **search box**
- Click **Go**
- Results can be filtered after search is performed.

Advanced Search

- Choose **advanced search** link from the Simple search screen
- Choose **document type** from the dropdown menu or search all documents
- IF document type other that All documents was chosen then, click **Go**
- Apply search filters – filters will change dependent on document type chosen
- Click **Go** button
- Further filters can be applied after search is performed

5) Receiving

QUANTITY RECEIVING

- Follow *Finding an Order* instructions
- From **Available Actions** dropdown menu, chose **Create Quantity Receipt**
- Remove lines from the receipt document, if needed, for items that have not been received – Click **Remove Line** button or check box on each line and chose **Remove Selected Items** from dropdown menu
- Click **Go** button
- Adjust quantities on each line to reflect the actual quantities received
- Click **Save Updates** button
- Click **Complete** button

COST RECEIVING FOR STANDING ORDERS

- Follow *Finding an Order* instructions
- From **Available Actions** dropdown menu, chose **Create Cost Receipt**
- Enter the exact dollar amount in dollars and cents
- Click **Complete** button

CORRECTING/CANCELING RECEIPT

***ONLY* WHEN *NO* INVOICE HAS BEEN ENTERED**

- Follow *Finding an Order* instructions
- From PO view, click **Receipts** tab
- Click the **receipt number** that needs correction
- Click **Reopen Receipt** button – upper right hand corner of screen
- Type in **reason** to reopen receipt in pop up window
- Click **Reopen Receipt** button in pop up window
- To DELETE – Click **Delete** button
- To CORRECT – Make corrections to receipt document
- Click **Save Updates** button
- Click **Complete** button

6) Create a New Draft Cart

- Click **Carts Menu** icon from Navigation ribbon, then **My Carts and Orders**
- Click **View Draft Shopping Carts**
- Click **Create Cart** button
- Enter **Cart Name,** Optional
- Click Update button
- Follow *Placing Orders* instructions to begin shopping

7) Favorites

From a draft cart:

- Click in **check box** for items to save
- From **action dropdown** menu, chose **Add to Favorites**
- Chose a saved folder
- OR Click **New** button to create a new folder (personal or shared)
- Enter **Name** for the new folder
- Click **Save** button
- Click **Submit** button

From requisition:

- Click **check box** on line items to add
- From **For selected line items** dropdown box, chose **Add to Favorites**
- Follow same instructions above

Ordering from Favorites

- Click **Favorites** link located just below the Shop box
- Click the **folder name**
- Enter **quantities** for items to be added
- Click **Add to Cart** button
- Go to **draft carts** to complete order

8) Viewing Order Status

- Follow *Finding an Order* instructions to find a requisition (Pending, Returned or Completed) OR Purchase Order
- To Find current workflow step – Click on PR or PO **Workflow** tab – Flow chart will indicate the Current Step and the approvers for that step
- To find all information associated with a PR or PO including why the request has been returned – Click on **History** tab
- To find comments – Click on **Comments** tab – Use dropdown menu to find **all** comments
- To add a comment to an order – Click on **Comments** tab – Click **Add Comment** button - Click **add email recipient** link (if email needed) - Enter **Comment** in box – Click **Add Comment** button
- To add a document to an order – Click on **Comments** tab – Enter Comment in comment box - Choose **Attachment Type** from dropdown menu – Browse for file to attach – Click **Add Comment** button