OVERVIEW

This instruction guide is for Requestors who have the role UF_N_MKT_REQUESTOR. Shoppers may complete a requisition with this information but must assign it to a requestor to place the order. Use this instruction guide to complete a requisition in myUF Market either after filling the cart yourself or having it assigned to you by a Shopper. Click the Proceed to Checkout button on the top right corner of the cart to complete required information such as Shipping, Billing, PO Business Unit, and ChartFields.

Distribute By options, Internal Notes and External Notes may also be completed as well as attachments. When completed, the requestor submits the order using the Place Order button at the top. This button remains grayed out until the requisition is complete and ready for ordering.

STEPS

1. Access myUF Market by navigating to http://my.ufl.edu and logging in with your Gatorlink username and password, and navigate by:
   • Clicking eProcurement > click myUF Market for the UF_N_MKT_Requestor role
   • Clicking My Self Service > click myUF Market for UF_N_MKT_Requestor role

2. To view your current cart,
   • Click the Cart Icon or dollar amount in USD on the banner menu on the top-right to access your current Cart.
     o Click the View My Cart button in the fly out box.
   • Make sure the cart contains a Cart Name in the top-left corner that will be easy to use for finding the requisition in the future. Enter/edit the name in the Name this cart text box.
   • If a cart was assigned to you, return the cart to the Shopper if needed, with an explanation, by clicking the Return Cart button above the name of the cart that will display.

3. To process as a requisition:
   • To process a cart as a requisition, click the Proceed to Checkout button at the top
The system will display the requisition per each step in the **Guided Checkout bar** at the top – the dark, highlighted step is what is currently on the screen ready for editing.

Some steps may be completed with default values from the **User Profile**. Please use the instruction guide, “Setting Up Your User Profile,” found on the FLPTU Toolkit to set up these default values.

A green checkmark on the bar means complete; a red triangle needs attention. Keep in mind that defaulted information may still require review even though the step indicates it is complete.

Click the **Review** step at the end to view the entire requisition at once.

Not all steps will be required for all requisitions. For this example, let’s start with Shipping.

4. To complete the **Ship To** information,
   - Click wherever there is a pencil icon or click the **Edit** button to edit.

   - **myUF Market** displays three sections for shipping addresses:
     - Edit the existing address in the requisition
       - Add the **Attn To:** name and the **Room/Area** number
       - Click the **Save this address for future use** checkbox if you would like to save this in your profile for future selection and use
       - Click the checkbox to make this the **default address** in the future
       - Click the **Use** button to use
     - Select from the displayed address which one to use – these are from your User Profile
     - Search campuswide for the address you need:
       - Enter a building name in the **Nick Name** box or enter a street address in the Address Text box, for example, "Lakeland"
       - Click the **Search** button
       - Click the **Use** button to the right of the needed address to add to requisition

   - When the changes are complete, the screen will display a checkbox next to Shipping on the Guided Checkout bar. Click the next step on the bar to proceed, or click **Review** at the end to edit the entire requisition.
Bill To and PCard:

Bill To:
5. To complete the Bill To information
   - Click the Edit button inside the Billing box
   - Follow the same instructions for selecting a shipping address

Other Information – Distribute By:
6. Use this option if you need to pay the PO over time over several invoices, such as with a Service Requisition
   - Click the Edit button
   - Select from the Distribute By dropdown to distribute by Amount or by Quantity

ChartFields:

PO Business Unit:
7. Click the Edit button to enter a PO Business Unit
   - This will be the first four digits of your Dept ID
   - You will be able to find the PO in myUFL by searching for it with this PO Business Unit

ChartFields:
8. Click the Edit button to enter or modify any of the ChartFields needed for this requisition
   - ChartFields are the same as in myUFL; scroll to the right to view them all
   - Dept ID must start with "85" to work in a FLPTU form
   - For creating split distributions, see the instruction guide, “Processing a Split Distribution in myUF Market,” found on the FLPTU Toolkit
   - Enter Dept ID, Fund Code, Program Code, and Account Code, or click the Select From All Values link to search for each of these
     - If they are part of the Shopper or Requestor or Approver’s User Profile, if they are marked as Default, they will autopopulate the field, otherwise, click the dropdown, Select From Profile Values, for each of these to select and add to the requisition
   - You may also set up ChartField String Favorites in your User Profile! Save a ChartField string and add the string automatically to the requisition later, or save several, and select one within the requisition to instantly populate the ChartFields. To learn how to do this, refer to the “Using ChartField String Favorites” instruction guide on the FLPTU Toolkit
Internal Notes and Attachments:
9. Click the Edit button to add an internal note which will go to your department financial approver and to Purchasing Services if the requisition is routed that way
   - Click the Attachments link to upload an attachment

External Notes and Attachments:
10. Click the Edit button to add an external note which will go to the vendor
   - Click the Attachments link to upload an attachment for the vendor
   - To see if an enabled vendor reads External Notes or attachments, review the myUF Market Enabled Vendor Reference Tool on this page: http://purchasing.ufl.edu/departments/myufmarket/vendors.asp

Review Commodity Code:
11. Click the Edit button at the line level to search for the correct Commodity Code on the form by clicking the search... link next to the Commodity Code
   - Some forms include Commodity Code instructions in the instructions – please read!
   - Use the instruction guide, “Searching for Commodity Codes,” found on the FLPTU Toolkit, to help with selection

Placing the Order:
12. To place the order, all the steps in the Guided Checkout bar should have green checks for the Place Order button to become active
   - Click the Place Order button to place the order

For additional help, e-mail myufmarket@ufl.edu or call Purchasing Services at (352) 392-1335.