# Creating a Marketplace Requisition

Creators can create a requisition for goods or services that are currently available on the Marketplace.

All requisitions for these suppliers must be created in the Marketplace. This ensures that CUNY receives the negotiated contract pricing.

Once a Creator has logged onto CUNYBuy, the following must be verified:

- The homepage displays the correct Business Unit. If it does not, change the Business Unit to the correct one before proceeding with any other tasks. You can change your Business Unit by clicking **User** icon in the top right corner and selecting the
- Ensure that the Cart is empty and at "0.00 USD".
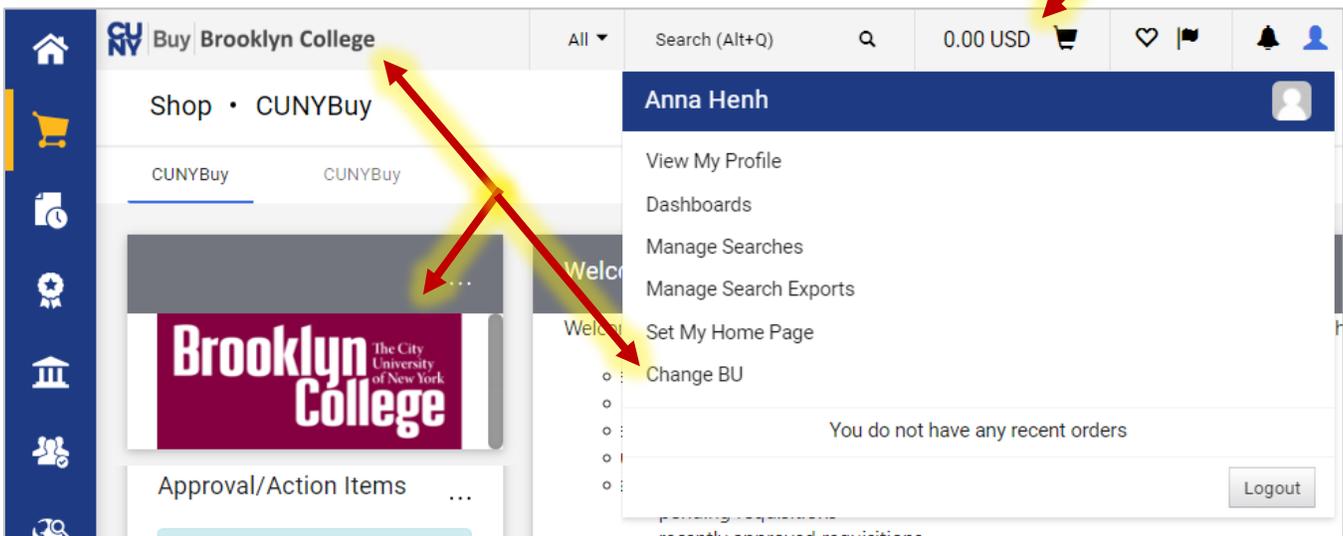
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Scroll down to the **Marketplace** section of the page and click on the supplier that will provide the goods required. Clicking on the supplier tile will take you to the website of the supplier..

Each supplier's page will look different, so ensure that you follow the website navigation to add the needed items to your cart. When you have completed shopping, click on the **Cart** icon to proceed to checkout.

Any changes to the order – quantity, goods, adding or removing a line, etc. should be done at this time, prior to submitting the order.

Click the **Submit Order** button. You will be returned to the **Shopping Cart** page in CUNYBuy.
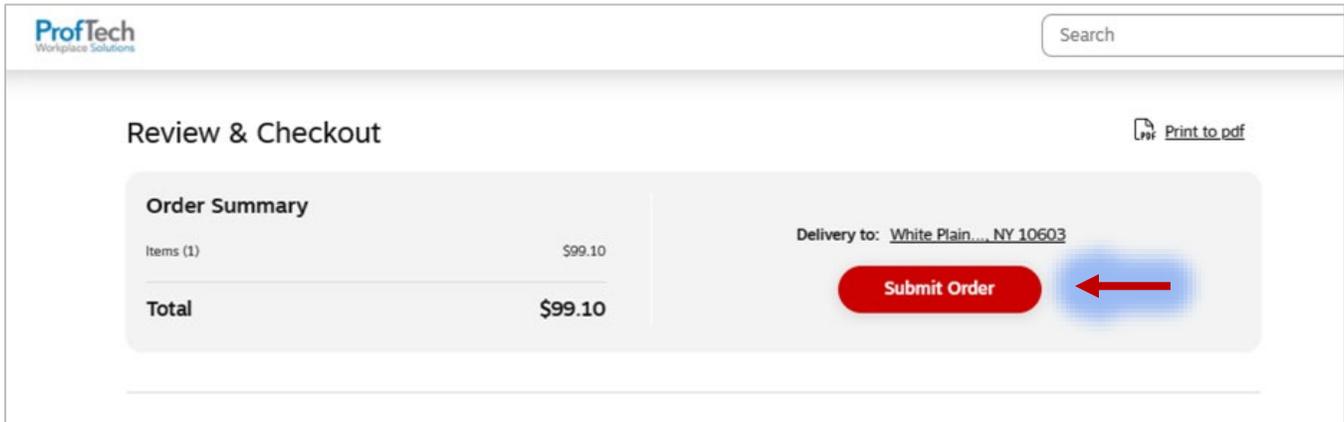
Review the Shopping Cart and ensure that the items and quantities are correct.

Note: This is your last opportunity to make any changes to the contents of your cart. Once you proceed to checkout, you will not longer have the ability to modify the contents of your cart. To make changes, click the **Modify Items** link, which will take you back to the supplier website.

Click the **Proceed to Checkout** button to continue creating the requisition. You will be taken to the **Requisition** page.
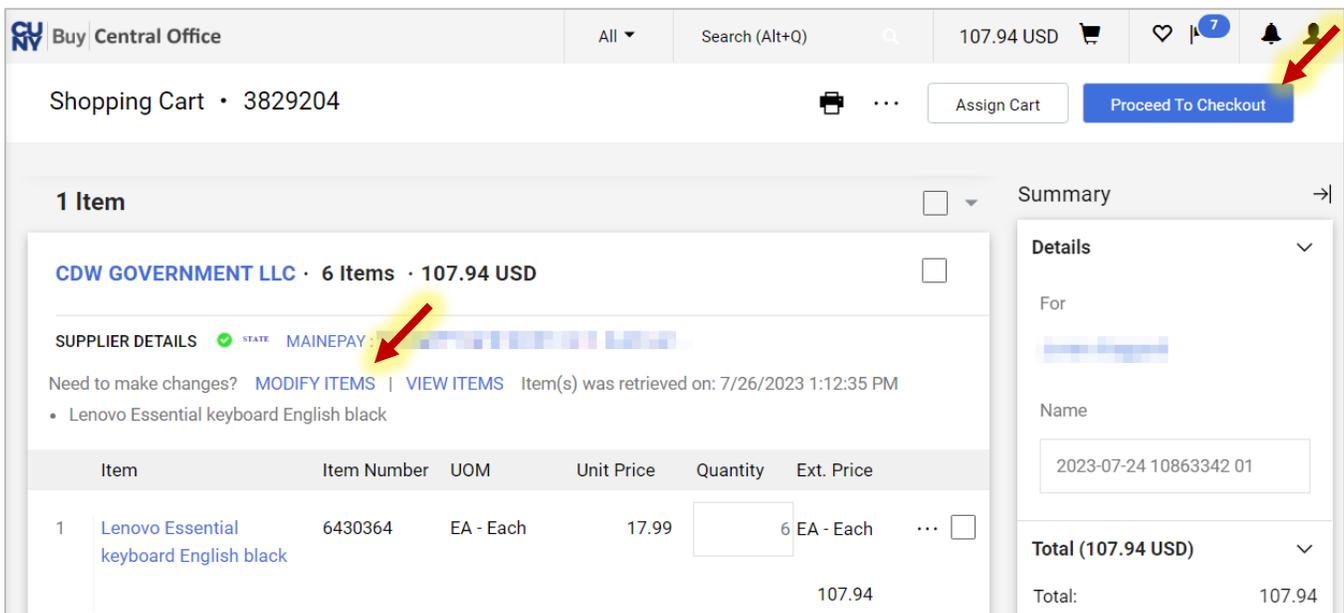
The **Requisition** page will show the assigned requisition number at the top. On the right side of the **Requisition** page is the **Summary** section that lists the status of the requisition and any issues that needs to be addressed. These issues are also listed in the main document in red. You can address each issue by clicking the link in the **Summary** section or the **Required** flag in the main document.

Click the **Required: Justification** link to enter a justification for this requisition.

Enter a descriptive name in the **Requisition Name** field. You have to rename your requisition from the automatically populated name to make it easier to search for at a later date.

Enter your justification in the **Justification** field.

Change the name in the **Prepared for** field if you are creating a requisition on behalf of a co-worker in your business unit.

Do not check off the **Amount Only** checkbox for Market Requisitions– it will cause errors and your requisition will not move forward.

Click the **Save** button to continue.

The **Required: Justification** issue will no longer be listed in the **Summary** section.

Continue going through the issues under the **Summary** section. There are several key items to note and information that is required on this page. The box on the right – headed Draft, indicates that there is additional information to be provided on this page.

Click the **Edit** pencil icon next to the **Shipping** section and select one of the available addresses from the menu. Click the **Save** button.

NOTE: If an address is not listed, you must submit a Service Now ticket to add the address.

Click the **Edit** pencil icon across from the **Billing** section.**lick** on the magnifying glass to see the options. Select the correct Accounts Payable address from the menu, then click the **Save** button**.**

Note: Billing address **must match** the business unit (BU). Therefore, you must never enter a default billing address in your profile. If a billing address does not match the BU, an error will result and your requisition will not move forward.

NOTE: If an address is not listed, you must submit a Service Now ticket to add the address.

The next step is to enter the Accounting Codes (Chartfields) for this transaction. Click the **Edit** pencil icon or any of the **Required** flags in the Accounting Codes section.

Chartfields can be entered directly into the fields or selected using the dropdown menu and search icons. If you have previously created chartfield favorites, you can select them by clicking the **Code Favorites** heart icon and selecting from the dropdown menu.

Note: Talk to your business office regarding any questions about chartfield strings.

You can validate the chartfield string by selecting the **Recalculate/Validate** checkmark icon.

Click the **Save** button once you have entered and validated the chartfields.

When you return to the main page, the **Summary** section should have no additional corrections indicated. If it does, correct them at this time.

Use the **Comment** tab to enter support information for the requisition. Click the **New Comment** plus-sign icon to add a comment. Comments are only for internal CUNY review. All communications for requisitions should be entered into CUNYBuy for a complete record contained in one location, allowing any authorized person to derive information and status.

Note: Do **not** add attachments for marketplace requisitions.

Once you have finished entering all relevant information, click the **Submit Request** button on the top-right of the page. This will finalize your requisition and submit it into workflow.

Once your requisition has been submitted, you will see a confirmation receipt. You can print this confirmation by selecting the **Print** link. You can click on the **Requisition number** link to return to the requisition page, which will provide information on the status of the requisition as it goes through workflow.
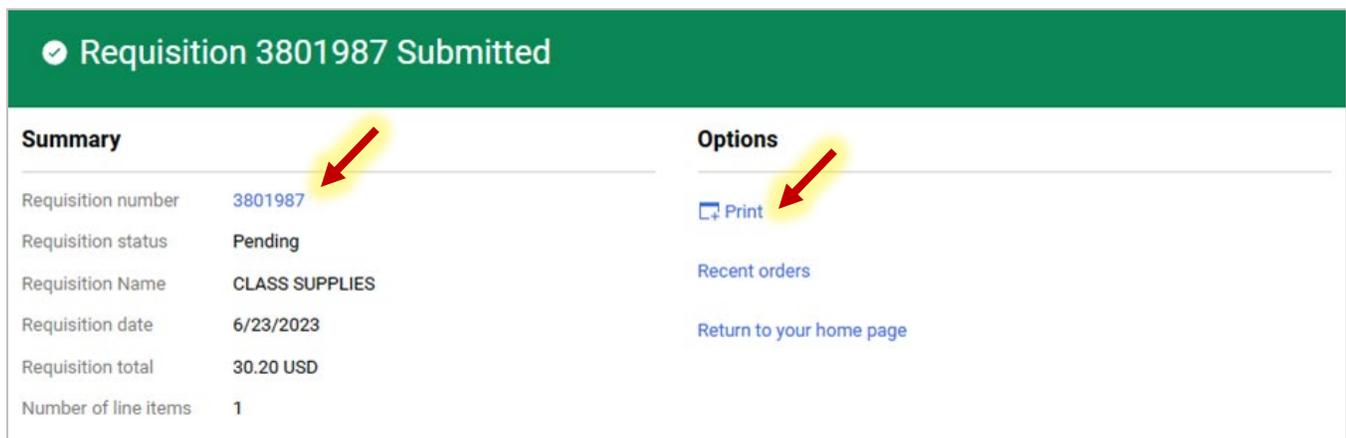

Once the requisition is submitted, its status changes from **Draft** to **Pending**. As you scroll through the **Summary** section, you will see that the **Budget** has already been checked and the **Budget Pre-encumbrance** has been set.

Note: The budget is checked automatically in CUNYBuy and it is checked prior to any approvals.

As you scroll down further in the **Summary** section, you will be able to see the approvals that are required for this requisition. Unlike CUNYfirst, there is no requirement for Supervisor approval. In CUNYBuy, requisition approvals are based on two criteria:

- The department associated with the requisition.
- The dollar value of the requisition
  - o A requisition with a value of less than $2500, requires one level of approval (Department 1 Approval).
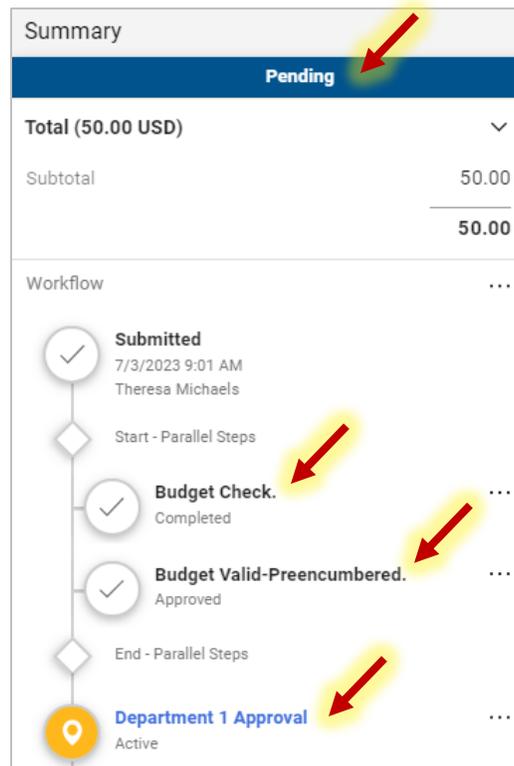
- A requisition with a value of $2500 or greater and less than $10,000 requires two levels of approval (Department 1 and Department 2 Approvals).
- All requisitions with a value of $10,000 or greater require three levels of approval (Department 1, Department 2, and Department 3 Approvals).

Click on the **Department Approval** link to view the list of approvers.

Category approvers are also indicated if the category code of the requisition requires that approval.

The requisition will be sent to the approval queues of the identified approvers automatically through CUNYBuy workflow.

Note: Marketplace requisitions will be sent directly to the supplier. They do not require the creation of a Purchase Order by the purchasing department.

Check the Progress of a Requisition/Purchase Order

Click on the **Orders** icon in the left-hand menu and select the **All Orders** option from the pop-up menu.

The **Search All Orders** page contains a significant amount of information. See the status and details of requisitions, purchase orders, vouchers, etc. by clicking the **Order Identifier** link.

Different Chartfields For Multiple Line Requisitions

For multiple line requisitions, you **must** change the chartfield on each item line at checkout.

1. Navigate to the Summary tab of your requisition and scroll down to **Accounting Codes**.
2. You must start by entering the chartfield in the **Accounting Codes** section by clicking on the **Edit Accounting Codes Section** icon. This chartfield will be applied to all line items.

3. Scroll down to the Line Items section and click the **Line Item Actions** ellipses icon. Select **Chartfield(s)** from the dropdown menu.

4. Enter the new chartfield in the **Override Line: Chartfield** box and click the **Save** button.
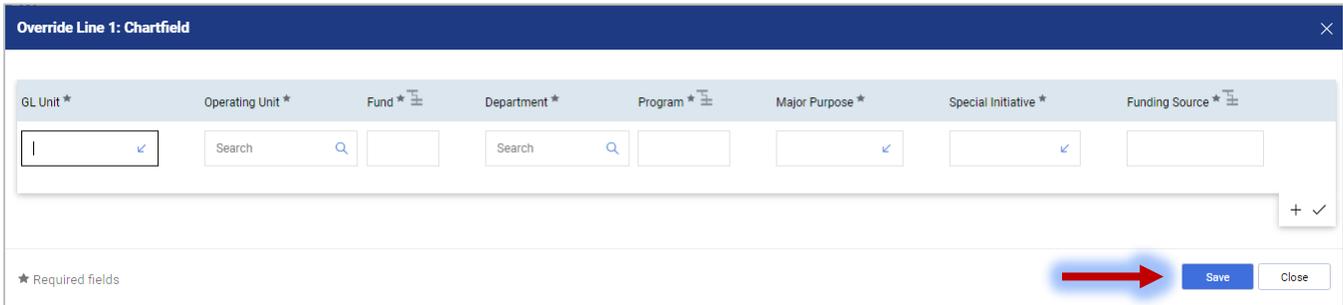
Important Reminders:

- Always verify/change if needed your Business Unit (BU) when you start a process.
- Always start with an empty cart.
- Once a marketplace requisition receives all approvals, it is automatically sourced to a PO.
- When searching for requisitions, if it is not found through the search function, check your cart. A requisition that does not pass budget will be automatically returned to your cart as a draft.
- Do not set a billing address as default. If the billing address does not match the BU, it will return an error and will not move forward.
- Never include any attachments for marketplace requisitions
- Do all communication via CUNYBuy. No communication related to the requisition should be done outside of CUNYBuy. This way the entire requisition record is complete and whole, allowing anyone with access to the requisition record to have all information needed to act on it.