Step-by-Step Guide

Shopper: Selecting Items from Punch-Out (Supplier) Catalogs

1. Click on the **Add Item** button and select **Duke Marketplace**.

2. Shopping from a Punch-Out (Supplier) Catalog has a few limitations:
   - Supplier Catalogs are maintained by suppliers and not by Duke Procurement staff members. Therefore, changes in pricing, descriptions, item numbers, and other important purchasing information may change without notice.
   - Shoppers cannot identify product favorites on the supplier’s website and save them into the Favorites folder on the Duke Marketplace website. They will be saved only on the supplier’s punch-out site.
   - Shoppers cannot create draft carts at the supplier’s website and save them back into their Duke Marketplace cart.

3. Select a supplier for your items by clicking on the box with the supplier’s name.
4. When the supplier’s punch-out window opens, you will have moved from the Duke Marketplace to the supplier’s website. Each supplier’s website will look and function differently.

5. Once in the supplier’s website, confirm that this is the Duke-specific supplier site by locating the Duke logo at the top of the page.

6. If you know the supplier’s catalog item number, enter the number and other requested information (quantity, unit of measure) in the appropriate fields and click on the Search, Find, or Add to Basket button.

7. If you do not know the supplier’s catalog item number, enter a description of the item you wish to view in the appropriate search field and click on the Search, Find, or Go button.
8. In the resulting list, narrow the list by selecting criteria using the various functions.

9. Use the various functions of the supplier’s website to learn more about items and compare them, if you wish.

10. Once you have selected an item for your shopping cart, click on the link describing the item. This action will direct you to an item detail screen.
11. Enter the quantity and add it to your cart, basket, list, or whatever term the supplier uses on the website.

12. Repeat steps 6-11 until you have placed all the items in the shopping cart.

13. Once you have placed all items in the shopping cart for this supplier’s website, perform the checkout functions as outlined. This action will return you to the Duke Marketplace.

14. Notice on the Duke Marketplace website that you have now created a shopping cart.
15. At the top right, notice that there is a link for the cart with a name that includes the date, your Net ID, and the cart number for the day (01 if it is the first cart).

16. Note that any time you are in the Marketplace you will see this cart link. Click on the cart link at any time to return to the cart.

17. If desired, change the name of the cart by entering new text in the Name This Cart field and click on the Update button.

18. Continue shopping by clicking on the Continue Shopping link.

19. When you finish shopping, click on the Finish Shopping button.

20. To view more information about the supplier, click on the Supplier’s name or the More Info link.

21. To return to the supplier’s website:
   - Use the Modify Items link to return to the ordering screen and make changes; or
   - Use the View Items links to return to the ordering screen with a view-only display. No changes can be made in the view-only mode.

22. To delete an item, use the Remove button in the Product Description field.

23. To view detailed information about the product, click on the item name. This action will open a new window with the information.
24. The **Product Type** icon identifies the item as a Punch-Out item, coming into Duke Marketplace from a supplier's website.

25. The remainder of the Product Information box summarizes the product information and pricing.

26. To change the quantity, simply change the number and click the **Update** button.

27. To return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home/Shop** page or click on the **Continue Shopping** link.

28. You may add more items to the Duke Marketplace shopping cart by:
   - Selecting items from another Punch-Out (Supplier) Catalog; or
   - Selecting items from a Hosted Catalog; or
   - Adding Non-Catalog (Text) items.
     Follow the steps outlined elsewhere in this document.

29. Once you’ve added all the items you wish to place in your cart, review the cart by clicking on its name in the top right corner.

30. If you have finished shopping, click on the **Finish Shopping** button to return to the **Create Shopping Cart** page in the Buy@Duke website.

31. If you wish to add **Attachments** or **Notes** to the items in your cart, follow steps 32-35 outlined in “Adding Notes and Attachments to a Shopping Cart” on page 20. Some purchases require Attachments and Notes. If you will not add these or assign financial information, proceed to step 33 to complete your cart.

32. If your department requires you to enter a Cost Object and G/L Account for the items in your cart, follow steps 36-40 outlined in “Assigning Financial Information to a Shopping Cart” on page 20. If your department does not require you to enter the financial codes, the information will be entered by your Submitter at a later time.

33. Next, click the **Check** button.
34. Review the white box at the top for any messages and take action as follows:
   - If you entered financial information and see error messages related to Account Assignments, make the corrections.
   - If you did not enter financial information, you may ignore the financial error messages as your cart Submitter will make the financial account assignments.

35. Follow any other instructions you see in the white box.

36. You may add more items to the Duke Marketplace shopping cart by: selecting items from another Hosted Catalog; selecting items from a Punch-Out (Supplier) Catalog; or adding Non-Catalog (Text) items. Follow the steps outlined elsewhere in this document for these transactions.

37. To save the cart, click the **Save** button. Notice that the Status indicator will change to Saved with a date and time stamp. You may return to the cart later to add other items or change other information.

38. If you wish to notify your Team Members (Purchasing Substitutes) that the cart is saved, click the **Notify** button and select All Team Members from the menu. This action will also save the cart, making the Save action above redundant.

39. If you have completed the cart and wish to notify your Submitters that the cart is ready for their review, click the **Notify** button and select Submitters or a single Submitter’s email address from the menu. This action will also save the cart, making the Save action above redundant.

37. Close your browser.