CRUZBUY CHECKOUT

General | Shipping | Billing | Internal Notes and Attachments | External Notes and Attachments | Accounting Codes | Final Review

Submit
or
Assign Cart

◄ Return to shopping cart   ◄ Continue Shopping

✓ **All done!** The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | Workflow | PO Preview | Comments | Attachments | History

Summary | Shipping | Billing | Accounting Codes | Supplier Info | Taxes/S&H

Hide header   Hide value descriptions

General	?
Cart Name	checkout examples edit
Prepared by	Wendy Wells
Prepared for	Wendy Wells
Department	Purchasing Dept
Original Submitter	Wendy Wells
Hold PO	no value
Accounting Date	no value

1

Shipping	?
Ship To	edit

Department Purchasing Department
Phone +831 (459) 1842
Email wwells1@ucsc.edu
Attention Wendy Wells
Univ. of Calif. Santa Cruz
1156 High Street
2300 Delaware 2nd Floor
Santa Cruz, CA 95064
United States

2

Delivery Options   edit
Ship Via

Best Carrier Best Way

View/edit by line item...

Billing	?
Bill To	edit

aphelp@ucsc.edu / (831) 459-4488
UC Santa Cruz
FAST Office/Accounts Payable
1156 High Street
Santa Cruz, CA 95064
United States

3

View/edit by line item...

Internal Notes and Attachments	?
PI/Other Approver	no value edit
Special Handling	no value
Internal Note	no note
Internal Attachments	
add attachment...	

4

External Notes and Attachments	?
Purchasing Contact	Purchasing Operations edit
	Purchasing Operations
Purchasing Email	buy4me@ucsc.edu
	buy4me@ucsc.edu
Purchasing Phone	(831)459-2311
	(831)459-2311
For Purchasing Use Only	no note
Attachments for all suppliers	

5

add attachment...

Accounting Codes   ?

Fund	Organization	Account	Activity	Chart	edit
19900	760206	001260	no value	X	
General State Appropriations	STECOL/Hsg/Rep & Maint	Services-Not Otherwise Categorized			

Other Codes   **6**   edit

WorkOrder (10 Char Max.)
no value

View/edit by line item...

Supplier / Line Item Details   ?

Hide line details   For selected line items Add To Favorites ▼ **Go**

OfficeMax (No PO Walk-in Orders) ✴ $ ▦ 📦 more info...   PO Number   To Be Assigned
Free Shipping

View/edit by line item...

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price		
1	OfficeMax - Xerographic Copy Paper - 92, White, 10/Carton, 8-1/2" x 11", 20 lb 📦	P1OM44015CTN	CT	42.70	1 CT	42.70 USD		edit
	more info...					Contract: 702/OP/002 more info...		

Manufacturer Name	OFFICEMAX PRIVATE LABEL	Internal Note	no note	Taxable	✓
Manufacturer Part Number	OM44015CTN	Internal Attachments		Banner Line Item Text	no note
More Information URL	http://www.officemaxsolutions.com/c... 📌	add attachment...		Attachments for supplier	
UNSPSC	14-11-15-07				
more info...		**7**			

Supplier subtotal		42.70
Tax1		3.74
Tax2		0.00
Supplier total		**46.44 USD**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	42.70
Tax1	3.74
Tax2	0.00
Total	**46.44 USD**

CruzBuy Checkout Edit Options

Section 1: HOLD PO

Hold PO is used to prevent electronic distribution of a PO to the Vendor (usually walk-in vendors like Costco or Safeway). To 'Hold PO':
1. Click the 'edit' button
2. Select the 'Yes' option
3. Save

Section 2: SPECIAL SHIPPING INSTRUCTIONS

1. Click the 'edit' button
2. Select the Special Instructions (SI) Address (search for 'Special' and follow prompts)
3. Change Special Handling to 'Yes'
4. Add an Internal Note requesting the special shipping address and delivery phone number

Section 3: BILL TO ADDRESS

All 'Bill To' addresses are to 'FAST Office/Accounts Payable'. The only exceptions are BayTree Bookstore, Copier Program, Fleet Services, Library, New Teacher Center, PP&C, PPSC and UARCBL.

Section 4: INTERNAL NOTES & ATTACHMENTS

PI/Other Approver – Adds additional Requisition approver
1. Click the 'edit' button
2. Select name of PI/Other Approver
3. **Save**

Attachments – Add Attachment and/or send attachment to Vendor

1. Click the 'edit' button
2. Add attachment to Internal Notes & Attachments section (follow prompts)
3. Change Special Handling to 'Yes'
4. Add an Internal Note requesting the attachment is included in PO sent to Vendor and save

Section 5: EXTERNAL NOTES AND ATTACHMENTS

- Purchasing contact information will default unless a PO is assigned to a Buyer
- External attachments 'For Purchasing Only'; see add attachment above

Section 6: ACCOUNTING CODES

Accounting Codes are required for all line items. See the 'CruzBuy Resources' Handout for the link and make sure you have selected the CruzBuy list (at top of page).

Requisition	Workflow	PO Preview	Comments	Attachments (1)	History

Summary	Shipping	Billing	Accounting Codes	Supplier Info	Taxes/S&H

Accounting Codes ?

Fund	Organization	Account	Activity	Chart	edit
19900
General State Appropriations	722033
PURCH/E-Procurement	001260
Services-Not Otherwise Categorized	no value	X	

Other Codes edit

WorkOrder (10 Char Max.)

no value

View/edit by line item...

To Edit Account Codes:

1. Click on the 'edit' button
2. Enter Fund, Organization, Account and Activity (if applicable) and save.
3. If using a Food & Entertainment form, enter the organization code from value menus
4. Frequently used accounting codes can be entered into "profile values" in "My Profile"
5. To split accounting codes, select the 'add split' option and follow prompts

Accounting Codes

Select from your code favorites ▼

Fund	Organization	Account	Activity	Chart	add split
				X	
Select from profile values...
Select from all values...
❌ Required field	Select from profile values...
Select from all values...
❌ Required field	Select from profile values...
Select from all values...	Select from all values...	Select from profile values...
Select from all values...
Clear selected value...	

Save   Cancel

Accounting Codes   ? X

Select from your code favorites ▼

Fund	Organization	Account	Activity	Chart	add split
19900	722033	001260		X	
Select from profile values...
Select from all values...	Select from profile values...
Select from all values...	Select from profile values...
Select from all values...	Select from all values...	Select from profile values...
Select from all values...
Clear selected value...	

Save   Cancel

Section 7: LINE ITEM MODIFICATIONS

Line item modifications from the Summary Tab include:
1. Removing Tax
2. Changing quantity or price on a Form
3. Adding attachments or internal notes
4. The Banner line item text option is not used
5. Click on the 'edit' button and follow prompts.

NOTE: Individual modifications can be made for each line item on a Requisition by selecting the appropriate tab: Shipping, Billing, Accounting Codes, Supplier Info and Taxes/S&H.

These options allow for unique modifications to each line item.
1. Select the appropriate tab to make unique modification to each line item
2. Follow the prompts for each edit

CRUZBUY SPECIAL ISSUES

WORKFLOW TAB - IS MY REQUISITION APPROVED ?

Select the Workflow tab on your Requisition for approval status. A list of Approvers is available by clicking on 'view approvers' In the example below, the Requisition requires the standard Org Approval and also Team 2 "Services" review and approval.

WHERE IS THE PO NUMBER ?

After the Requisition completes the Workflow approval process, it will be assigned a Purchase Order number, P0xxxxxx. This is located on the Requisition to the right of the Vendor Name. Note: CruzBuy assigns a **temporary 'all numeric'** PO number during final processing. Use only the number beginning with 'P'.

INVOICES

Invoices do not get paid unless they are send to Accounts Payable with the PO number on them.
- Email invoices to aphelp@ucsc.edu or fax to 459-1073
- The Accounts Payable helpline is 459-4488