

HOW TO

Purchase Items via the GeorgiaFIRST Marketplace

This job aid will go through the steps on how to purchase goods from the GeorgiaFIRST Marketplace; an online shopping tool created by the University System of Georgia to make purchasing through agency contract vendors efficient and easy. If you are unable to find the item(s) you want to buy in the marketplace, see the **How to Create a Special Requisition** job aid.

- 1. Log in to **PeopleSoft** via <u>https://www.usg.edu/gafirst-fin/</u> by clicking **GeorgiaFIRST Financials** under **Core Users** on the right of the page. You will be prompted to log in using **Duo**.
- 2. Click the compass icon at the top right of the page. This opens the NavBar menu.
 - a. NOTE: Do not click the *GFM Shopper Access* tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.



- 3. On the NavBar menu, click Navigator > eProcurement > Requisition.
- 4. On this new page, under **Web**, select the **GeorgiaFIRST Marketplace** link.

	🙆 Home	My Preferences 🗱 Requisition Se	ettings DLines Checkout
	Search All V		Search Advanced Search
3	Web Browse Supplier Websites GAFirstMarketplace	Express Item Entry	Special Requests Create a non-catalog request
	Forms Create and Submit Forms	avorites Browse Favorite Items and Services Supplies	Templates Browse Company and Personal Templates Monthly Order



5. Build your **shopping cart** by using the Punch-Out catalogs (i.e. Staples, Fisher Scientific, Dell) <u>OR</u> by searching the hosted catalogs by using the Shop search field.

Shop	Everything Search Here Go to: advanced search favorites quick order Browse: suppliers categories contra	Go transformed and the second
Welcome to the GeorgiaFirst Marketplace (GFM) site. Please see below for important notes and updates:.	Georgia Preferred Suppliers	Click tiles to open
that have hosted items to improve the shopping experience. For these suppliers, click on the sticker to quickly access a search box for items from that supplier. We have over 100 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search	Maintenance, Repair, & Operation GRAINGER Fasteval Fasteval	vendor shop pages.
bar at the top and click "Go".	Office Supplies and Computers General Office Supplies Dell Dell	Р ПСОН
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- 6. Once you are finished adding items to your cart, select Checkout.
- 7. Review your cart for accuracy, then click **Submit > Proceed to Checkout > Issue Requisition.** You will be redirected to make any edits *(if necessary),* to add supporting documentation, and to submit your requisition into the approval process.
- 8. Enter a name for your requisition in the **Requisition Name** field in the upper right.
- You can update the distribution/accounting information, using <u>one</u> of two methods below (Individual Lines or Mutiple Lines):

NOTE: When using <u>either</u> option for accounting allocation changes:

- If you use the <u>SpeedChart function</u>, you must also populate the **BudRef** field on the **Chartfields 2** tab.
- If you <u>manually enter the allocation</u>, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the BudRef on the Chartfields 2 tab.

To Update Accounting Allocation on Individual lines:

Click the **Expand** buttons (triangles) and make necessary updates for each line.

Requisition L	Lines 👔															
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To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the Mass Change link.



-Update the Ship To Location if necessary.

ne Information (?)						
ote: The information below (ntered on this page will repla	does not reflect the d ice the data in the co	ata in the selected requisition responding fields on the se	on lines. Whe	n the 'OK' butto hat are available	n is clicked, e for sourcin	the data
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Buyer	Q	Category		Q		
hipping Information						
Ship To Location	Q <<	A	dd One Time	Address		
Due Date	P	Attention				
Ship Via	Q	Freight Terms		Q		
Comments						
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-Click OK.

-Click OK for All Distribution Lines to apply to all selected lines.

10. To add supporting documentation, click on the **Comments** bubble <u>or</u> the **Add** link at the end of the first line of your requisition; <u>DO NOT</u> use the *"Add More Comments and Attachments"* link at the bottom of the screen.

Add More Items					
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Delete Selected	ta Ma	iss Change			
Т	otal Amount	50.00 USD			

- a. On the next screen click Add Attachments and Browse for the saved scanned documents on your computer.
- b. Once located, click on the file you want to upload and click **Open > Upload > OK**.
- c. To verify you have attached your document(s), you will be able to see a **View** button on the screen where you added the document; and you will see a paperclip attached to your comment bubble when you return to the **Review and Submit** screen.



- 11. Enter the business purpose or any comments necessary in the **Approval Justification** field (**NOTE:** Do not include any slashes **(This: /)** in your comments).
- 12. Select checkboxes for Show at Receipt and Shown at Voucher.
- 13. <u>To insert any additional approvers (*if requested or required*), click Save for Later, then the Preview Approvals link. Click on a green plus sign to search for the User ID of the Approver you would like to insert, when entered click Insert.</u>



- 14. Click the Apply Approval Changes button.
- 15. Click **Save & Submit** to submit the requisition lines into the approval workflow.