

CU Marketplace Tip: Add Comments to CU Marketplace Requisitions to Notify Requesters and Approvers

What is it?

You can add Comments to a CU Marketplace Requisition and have it sent as an email notification to colleagues. Shoppers can add notes when they assign a Cart to a Requester. The note is included in an email notification sent to the Requester, which contains a direct link to the Requisition.

Requesters can submit a Requisition for approval and add Comments that can be emailed to selected Approvers or other colleagues to notify them that the Requisition is awaiting approval. If the Requisition is not yet in approval workflow, the Comment cannot be sent as an email notification and can only be viewed in the Comments tab when colleagues open and view the Requisition.

Approvers can also add Comments for the Requester and/or Shopper to notify them an order was approved. If an Approver returns or rejects a Requisition, they will be prompted to add a Comment before they complete the action.

Adding a Note when Assigning a Cart

Shoppers can add notes when they assign a Cart to a Requester. The note is included in the email notification sent to the Requester.

1. On the Shopping Cart page, click the Assign Cart button.

â	đ	COLUMBIA UNIVE	RSITY		All 🝷	Search (Alt+	q) Q	407.91 USD	Ä	♡ ⊨	41
1	5	Shopping Cart • Shoppi	ng Cart			=		Assign Cart	Pr	oceed To Che	ckout
6	Ι.	Simple Advanced					Details				~
õ		Search for products, suppliers, f	orms, part number, etc.			Q	For				
血		Cart Name	2023-05-02 ericshopper 01				Total (407.	91 USD)			~
112			F				Shipping, H	andling, and Tax char	ges are c	alculated an	d

The Assign Cart window appears.



2. You can **Select** a Requester from Favorites you created in your Profile **or Search** for any Requester that is setup in the Marketplace.

Assign Cart To:	Park, Terry SELECT 👻 Or SEARCH
Add to Profile	
Note To Assignee:	Important research supplies. Please submit this requisition as soon as possible

3. Type a **Note to Assignee**, if needed. Click the **Assign** button. The assigned Requester will receive an email alerting them that your Cart has been assigned to them and includes your Note to Assignee.

Viewing a Requisition to Add Comments

In order to add Comments to a Requisition, you must proceed to Checkout in order to view the Requisition

screen.

From a Cart

On the Shopping Cart page, click the **Proceed to Checkout** button.

*	🖆 Columbia University			All 🔻	Search (Alt+Q) 99.99 USD 🗑 💝 🏴 🌲 👤
1	Shopping Cart • Shopping Cart				Assign Cart Proceed To Checkout
16	Simple Advanced				Summary
8	Search for products, suppliers, forms, part number, etc.			Q	Details ~
				_	For
血	Cart Name 2023-11-28 ezz	248 02			Eric Zaretsky
-115					Total (99.99 USD)
39	Description				Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes,
The	e Checkout screen	n appears.			
^	🖆 Columbia University			Al •	Search (Alt+Q) 99.99 USD 👻 🗢 🔺 💄
<u>کر</u>	Requisition • 3913125				Assign Cart Place Order Place Order
6	Summary PO Preview Comments	Attachments History			
×	General	🖋 ··· Shipping		¢ v	Summary ->
	Cart Name 2023-11-28 ez2248 02	Shin To	Pill To		Uran
					Correct these issues.
.192.	Description no value	no address	no address		

Email recipients cannot be added to Comments in the Draft stage of a Requisition. Comments can only be viewed by those that open and view the Requisition.

After the Requisition is Submitted into Workflow

1. Navigate to the Shop icon > My Carts and Orders.



2. Click **View My Orders (Last 90 Days)**. The My Orders screen displays a table listing the Requisitions that have been submitted and their status.

×	^	COLUMBIA UNIVERS Shop + My Carts and Orders + View My Orders (L My Orders My Orders	ITY ast 90 Days)			All 🔻	Search (Alt+Q) Q	268.43 USD 📜	∞ № ▲ 1
	۲۵ 0	Submitted Date: Last 90 days Quick se 1-1 of 1 Results	arch		Q (1) Add Filter • Clea	ar All Filters			? ✿ 20 Per Page ▼
	۲ ۲	Requisition Number 🔻	Supplier Staples Ø	Requisition Name 2023-07-12 ericrequester 01	Requisition Status 💌	Prepared For Eric Requester	Sub 7/20/	mitted Date	Total Amount 44.26 USD
	ш								

3. Click a Requisition **Number** to view the Requisition page. Comments added to the Requisition while in approval workflow can be sent to Requesters, Approvers, and colleagues as email notifications.

Adding Comments to a Requisition

1. Click the **Comments** tab.

COLUMBIA UNIVERSITY	Purchase Orders 💌	Search (Alt+Q)		119.99 USD 📜	♡ №	1
Requisition • 3898850			e	··· Assign Cart	Place Or	der
Summary PO Preview Comments History						
Records found: 0 Show comments for	r Requisition V	+ Su	.mmary	Draft		→
No comments have been added		-	fotal (119.99 U	USD)		~
			hipping, Handli charged by each estimation purp approvals.	ling, and Tax charges are h supplier. The values sh poses, budget checking, i	e calculated and own here are fo and workflow	1

- 2. Click the **New Comments** ⁺ icon. The Add Comment screen appears.
- 3. Type your **Comment**. Optionally, you can attach a file or add a link/URL.

D COMMENT			~ ×
Please approve this requisition as soon as you are able.		This will add a comment to th been added to the document.	e document. If you select a user they will receive an email indicating that a comment has
		Email notification(s) Add rec	ipient by, Approved) «hris-testilicolumbia.edu»
3 characters remaining	expand 1 clear	✓ Reedy, Paul <hris-test@x< td=""><td>columbia.edu></td></hris-test@x<>	columbia.edu>
		Attach file (optional)	
		Attachment Type	File
			O Link/URL
		File Name	
		File	Choose File Upload your file

If your Requisition has already been submitted into workflow, you can select from a list of individuals who have worked with your requisition so they receive your comment as an Email notification. In addition, you can click **Add recipients** to search for Approvers or other individuals. This is a good way to notify an Approver that they have a Requisition in Workflow to approve.

4. Click the **Complete** icon. Comments are indicated on the Comments tab and listed on the Comments screen.

mmary	PO Preview	Comments 📀	Attachments	History	
ecords for	und: 2				Show comments for Regulation 🗸 🕂
Eric Zaretsk	y - 11/28/2023 2:13:5	2 PM			Requisition - 3912962 Comment Added
Please appr Email sent: Pa	ove this reqquisition a ul Reedy <hris-test@colur< td=""><td>s soon as you are able.</td><td></td><td></td><td></td></hris-test@colur<>	s soon as you are able.			
		2 PM			Requisition - 3912962 Requisition assigned
Eric Zaretsk	y - 11/28/2023 1:47:0	5 1 m			

Where do I get help?

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now <u>https://columbia.service-now.com</u>