Shopper Training Guide

QUEEN’S UNIVERSITY

ACQUIRE TEAM
The following tutorial will provide step-by-step instructions of how to shop for items within the Queen’s University acQuire e-Procurement system.

Time to review this tutorial is estimated at 5-10 minutes.

Time to complete this action in acQuire is estimated at under 5 minutes.

SHOPPER TRAINING GUIDE

As a Shopper, you have access to shop for and create carts to preferred Queen’s University suppliers.

You can do this via acQuire’s catalogue suppliers, or non-catalogue suppliers.
Shopping Home Page Layout:

1. Profile and Notification Bar (top right) – contains User profile options, Action Items, Notification and acQuire shopping cart

2. Navigation Bar (left)

3. Shop at the Top Search Bar

(Note: see above screenshot to match number references)
4. **Catalogue Supplier Stickers** – Office Supplies, IT, Life Science Lab Supplies, Textbooks
   - You can shop directly for individual items from Catalogue Suppliers (see below)

5. **Return to Home Page** – clicking the logo will also return to home shopping page
STEP 1. SHOP AND ADD ITEMS TO CART

Catalogue Supplier Items

- Search **all catalogue suppliers** - Use **Shop at the Top**
  - This will search for a product match from **ALL** Catalogue Suppliers

Catalogue Suppliers Showcase (stickers):
For example, searching for “dry erase marker” shows 85 matches, from 3 different catalogue suppliers:

- **By Single Catalogue Supplier**
  - You may also click on the sticker for the Catalogue Supplier if you know that the product you want is offered from that Catalogue Supplier. You may enter a specific item (or none) and hit the search (magnifying glass)
Note: For punchout suppliers, you will be re-directed to a Queen’s specific website for the supplier where you will search for items and create a shopping cart. Once you have completed shopping and checkout from the punchout site, you will be automatically redirected and your order will return to acQuire and be added to the acQuire shopping cart.

- Once you find the item you wish to purchase, add item to cart.
- Continue shopping and once all items have been added to cart, you can Checkout.

Non-Catalogue Supplier Orders
(for goods or services that cannot be obtained from a Catalogue Supplier)

To begin - you should have obtained the required documentation and quotes for a good or service from a supplier.

- Select Non-Catalogue Item on Shop at Top menu bar

- Select desired supplier from existing suppliers
• If supplier not found, go to Supplier Request Form. Supplier information will need to be collected and supplier profile will be reviewed, approved and created by acQuire team.

- Transfer information from quote to system – Product Description, Catalogue No. (if applicable), Quantity, Price Estimate, Currency, Packaging, Checkbox for Special Item (if applicable) for each line item on quote and then select a Category Code that best matches the good or service.

- The default currencies available in acQuire are CDN, USD, GBP and EURO, to use another currency you can convert to CDN using the exchange rates at: http://www.bankofcanada.ca/rates/exchange/daily-exchange-rates/. Ensure you include the preferred remittance currency & the value in the Comments tab.

• Note: Also ensure the supplier you are purchasing from is set up to receive wire (or bank draft) remittances, ahead of submitting the Requisition (the supplier address options available for selection
previously should detail whether WIRE or BANK DRAFT is an available option)

- You may attach an electronic copy of your internal documents/quotes at this time by selecting Add Internal Attachments (or this can be done at a later stage, when External Attachments [the location the supplier quotation should be uploaded] will also be added)

- Select a Category code that is the best match for the good or service
Once line information has been entered, Save and Close (if multiple lines, then use Save and Add Another button)

STEP 2: CART CHECKOUT

- Go to Profile and Notification Bar, select acQuire Shopping Cart and click Checkout

- To finalize your cart, go to the Summary Tab.
- It is **recommended** to edit the generic *Cart Name* to a more descriptive name.
- If you know the desired *Shipping* address, please select, otherwise leave for Requester to complete.
- If you know the *Billing* Location, please select, otherwise leave for Requester to complete.
  - **Note**: *Bill To address should default to Queen’s University Financial Services address* – if not, leave for Requester to complete.
- If you have a **non-catalogue** item in your cart please ensure that you have **uploaded an electronic copy** of all related documentation (i.e., quotes, signed contract [if applicable], completed procurement exception forms [if applicable] – located on the Requisition Summary Tab. Internal Attachments are for Queen’s use only. External Attachments will be sent to the Supplier.

- You may also add a **comment** (text or electronic attachment) with further instructions or information to your order (these would be useful for instructions or any items that need further action or a response from another Queen’s staff member)
STEP 3: ASSIGN CART TO REQUESTER

As a Shopper, once your cart has been completed and any documents/comments added you will need to assign your cart to a Requester.

- Click Assign Cart
- Search for an Assignee
  - Your business unit should advise ahead of time which Requester to assign your cart to for review and completion of order
- You may wish to add a note for additional directions to complete this order (i.e. desired chartfields)
- Click Assign button

You will receive a notification in the Profile and Notification Bar that your “Your Assigned Cart Has Been Submitted for Processing”
Once the Requester has reviewed and completed your cart and submitted it for approval, you will receive a notification that “Your Assigned Cart Has Been Submitted for Processing”

Once the cart has received all approvals you will receive notification that “Your Requisition has Completed Workflow” and the supplier will receive the order (by now, a Purchase Order with a new document ID).

**NOTE:** Requesters will be required to complete additional information to complete the cart and can then Submit Requisition for approval.
ADDITIONAL TIPS

Advanced Search

- An advanced search can add additional criteria to your product search. It can even have unique criteria specific to the type of good – e.g. Lab Supplies
Search by Product Categories

To view all catalogue items in a broad category of good or service, use the **Browse by Categories** feature and you can drill down as required to more specific sub-categories and view the items offered by catalogue suppliers, select **view** to see all available products in that category.
Comparing Items

Shoppers can compare multiple items to each other on all available product item criteria.
Copy Cart and Adding Items as Favourites

Copy Cart

Previous carts can be copied to a new cart (Note: except for carts with punchout Catalogue items).

- Search for the requisition number using Document search, open the Requisition and select Copy to New Cart.
Favourites

Items purchased regularly can be added as **Favourite Items** (*Note: Except for Catalogue Punchout items*) a few different ways.

**Option1: From the Cart**

- Click “Add to Favourites”

**Option2: After Checkout**

- At the line level in the checkout screen, under “**For selected line items**”, click “Add to Favourites”
- **Step1**: Give the item a Nickname, input the quantity of how many of the item you want to save to your Favourites, enter a description (optional)
- **Step2**: Chose/select which **Destination Folder** you want the item to be stored in (**Personal** is your own personal favourites list – this makes the most sense when adding items to your Favourites – **Shared** is a shared folder between multiple acQuire users)
- Click **Save Changes**
Editing Cart after Checkout

It is possible to edit the lines and items of the shopping cart after Proceeding to Checkout (quantity, category code, price [Note: For Non-catalogue items only] by selecting in the Requisition Summary Tab the line item you wish to edit.
<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog No</th>
<th>Size / Packaging</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext. Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardinal Write 'N Erase 11&quot; x 17&quot; Tabbed Dividers 12-tabs per set</td>
<td>84272</td>
<td>SET</td>
<td>6.65</td>
<td>1 SET</td>
<td>6.65 CA</td>
</tr>
</tbody>
</table>

**Manufacturer Name:** TOPS PRODUCTS CANADA
**UNSPSC:** 44-12-20-00

**Category Code:** 44120000 Other Supplies
**Type:** None
**HST Registered Supplier (Do Not Change):**

**Internal Note:**
**Internal Attachments:**

**External Note:**
**Attachments for supplier:**

**PO Clauses:**

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