



Customer FAQs

This goes over the more common questions you may have when using Unimarket.

Contents

Contents	2
Shopping	3
Shop and Search Items	3
Add Items to Your Cart	4
Create a Shopping List	5
Access Your Shopping Cart	6
Check Out	7
Checking Out	7
Edit or Change Delivery Address	8
Requisitions	9
Access an Incomplete Requisition	9
Reassign a Requisition	10
NOTE: Only the buyer can reassign a requisition.	10
Approvals	11
Approve a Requisition	11
Retrofit Orders	14
Create a Retrofit Order	14

Shopping

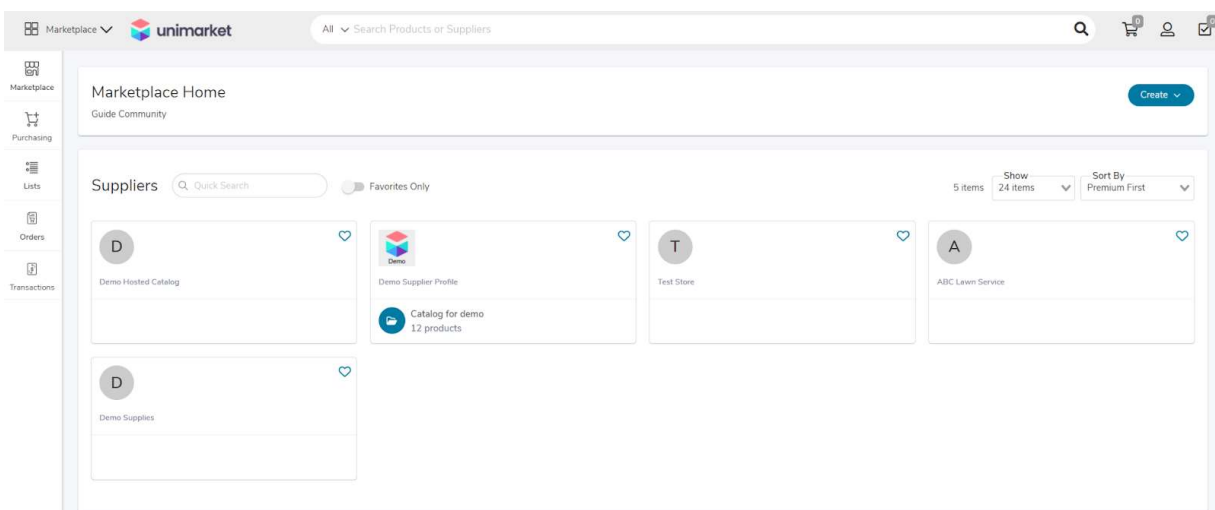
Shop and Search Items

To search by product, use the search bar at the top of your screen. Once you begin your search, additional filters appear such as Product Tag, Supplier Tag, supplier, or Category. These filters can help narrow down your search



If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.




- Use the **Search** bar at the top of the page to search for products or suppliers
- From **Marketplace Home**, choose from one of the following options under **Guided Buying**
- From Marketplace Home, use the **Quick Search** field next to Suppliers and sort by the **Favorites Only** flag and the **Sort By** drop-down menu
- Click the down arrow next to **Create** in the top-right corner of the Marketplace Home screen. When creating a Non-Catalog or Blanket Order, choose the Supplier.





Add Items to Your Cart

If you are searching by product via the search bar, click **Add to Cart** to add the item to your cart.

Products 8 items Show 12 items ⌵ ⌵ ☰


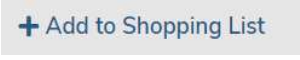
	<p>Mercury Supplier: Acme Supplies Product Code: 2 ⓘ Manufacturing:</p>	Qty - 1 +	\$5.00 Each Add To Cart ☰ Add To List
	<p>Mars Supplier: Acme Supplies Product Code: 5 ⓘ Manufacturing:</p>	Qty - 1 +	\$5.00 Each Add To Cart ☰ Add To List
	<p>Uranus Supplier: Acme Supplies Product Code: 8 ⓘ Manufacturing:</p>	Qty - 1 +	\$5.00 Each Add To Cart ☰ Add To List

There are a few ways to order products by Supplier: Hosted Catalog, Punchout/Roundtrip Catalog, and Non-Catalog Item.

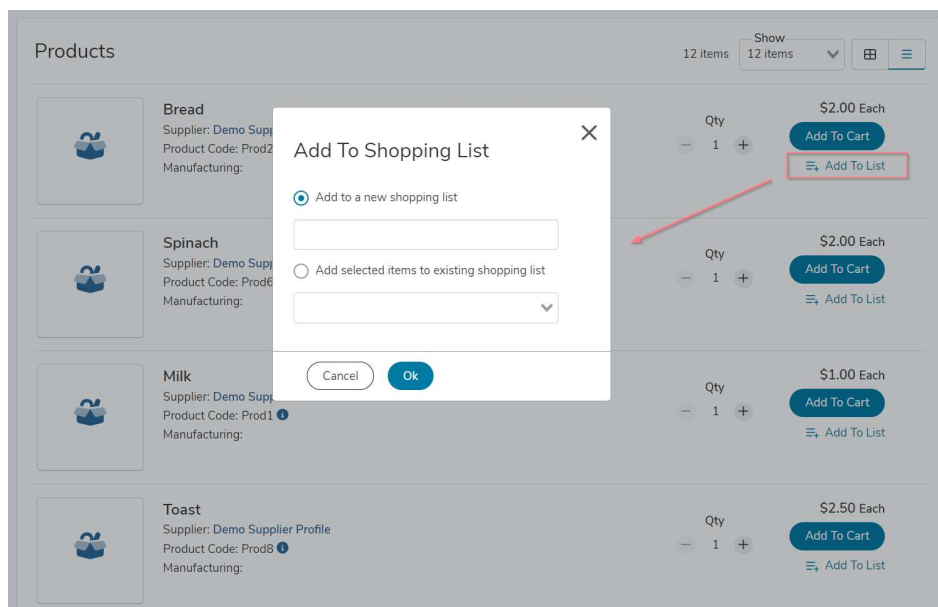
-  **Hosted/Standard Catalog** – is a catalog hosted on the Unimarket site and contains items for purchase.
-  **Roundtrip/Punchout** – takes you to the supplier’s website to add items to your cart. After you have completed selecting items, click the checkout or punchout button to be directed back to Unimarket for checkout.
- **Non-Catalog Items** – is used in unique situations where an item not featured in a catalog may be added to your cart. The Item Name, Unit Price, and Category are all

required to create the non-catalog item. Please contact both your community administrator and the supplier before proceeding.

Create a Shopping List

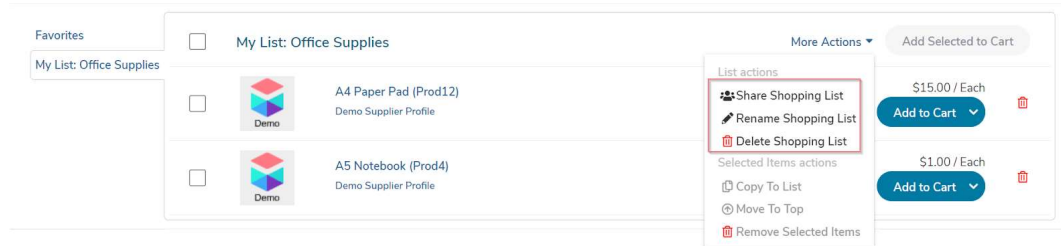
To create a shopping list, first, go to a hosted catalog or search for the product using the search bar. Once there, select  next to the corresponding item. Items already added to your shopping cart can also be added to a Shopping list by selecting the items and then clicking on  in the top-right corner.

A pop-up window will appear to Add to Shopping List. Select **Add to a new shopping list** and name the list or select the **Add selected items to existing shopping list** and choose from the drop-down menu.



To view your full list of added items, access your shopping list under Marketplace on the left-hand menu under Lists. From here, you can Add to Cart for individual items or check items to Add Selected to Cart. Click on **More Actions** to Share, Rename, or Delete a shopping list. For more information, visit our Helpdesk [HERE](#).

Shopping Lists



Access Your Shopping Cart


Access your shopping cart by clicking on the shopping cart symbol  in the top-right corner of your screen.

Items inside the shopping cart are organized by suppliers. Individual items or a group of checkbox items can be removed, edited, or contain more details under [Details](#) .

Check Out

Checking Out






To check out your shopping cart, take the following steps:

1. Click on the shopping cart symbol  in the top-right corner of your screen.
2. Check the boxes of items you wish to check out.
3. Select **Checkout** under each supplier to checkout by supplier or **Checkout All** to checkout all selected items.

Shopping Cart

[+ Add to Shopping List](#) [Clear Shopping Cart](#)

Demo Supplier Profile

<input checked="" type="checkbox"/>	Product	Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>	 Bacon (Prod4)	<input type="text" value="1"/>	\$4.00 / Each	\$4.00	Remove Details
<input checked="" type="checkbox"/>	 Bread (Prod2)	<input type="text" value="1"/>	\$2.00 / Each	\$2.00	Remove Details
<input checked="" type="checkbox"/>	 Butter (Prod9)	<input type="text" value="1"/>	\$3.00 / Each	\$3.00	Remove Details
<input checked="" type="checkbox"/>	 Spinach (Prod6)	<input type="text" value="1"/>	\$2.00 / Each	\$2.00	Remove Details
<input checked="" type="checkbox"/>	 Toast (Prod8)	<input type="text" value="1"/>	\$2.50 / Each	\$2.50	Remove Details

Supplier Total: \$13.50 [Checkout](#)

Cart Total: \$13.50 [Checkout All](#)

Edit or Change Delivery Address

To edit or change the delivery address, choose from the **Ship To** drop-down when on the Checkout page. If the address is currently not available, contact your community administrator for more information.

Checkout

Bill To

Ship To

Demo Billing [Bill To]
123 Testing Street
Beverly Hills, CA 90210
United States

Attn
Demo Admin

Demo Shipping [Ship To]
123 Testing Street
Beverly Hills, CA 90210
United States

If you need to add a specific room number, use the Attn field below the Ship To drop-down. For example, the screenshot below the Ship To is going to 123 Testing Street, Beverly Hills, CA 90210, but the user wrote in Room #6560 and the receiver's name "Smithsonian, Jonathan".

Checkout

Bill To

Ship To

Demo Billing [Bill To]
123 Testing Street
Beverly Hills, CA 90210
United States

Attn
Room # 6560 Smithsonian, Jonathan

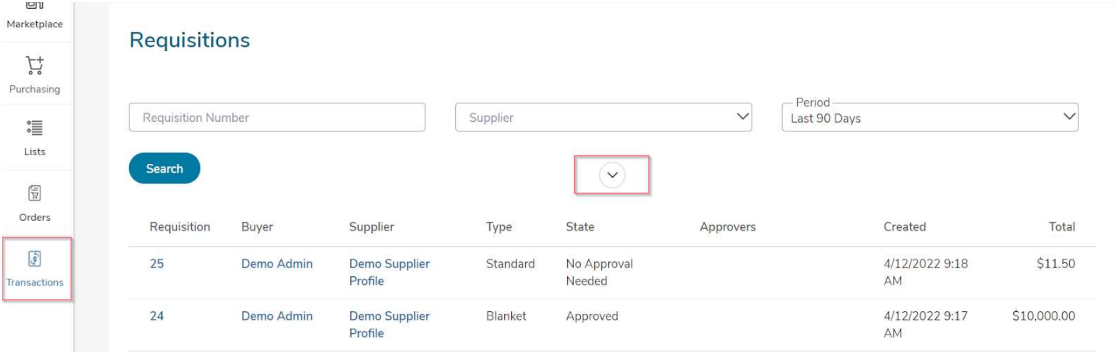
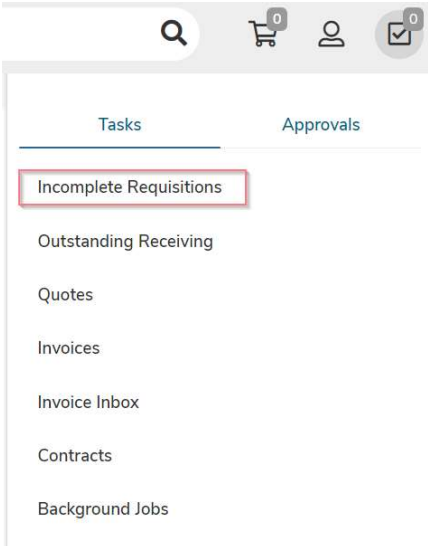
Demo Shipping [Ship To]
123 Testing Street
Beverly Hills, CA 90210
United States

Requisitions

Access an Incomplete Requisition

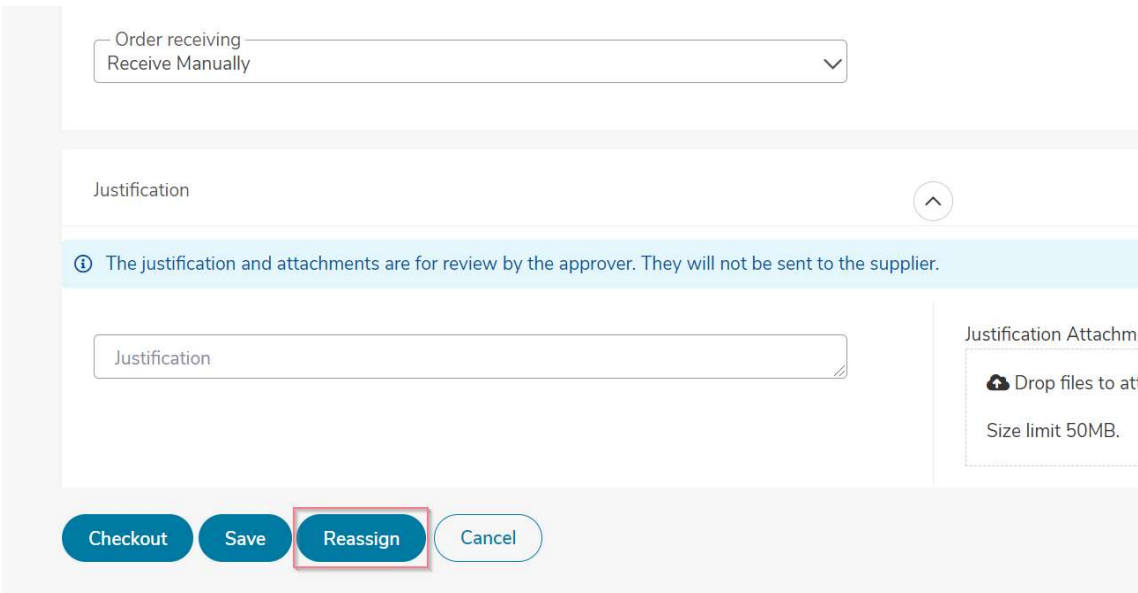
To access an incomplete requisition:

- Go to your **Tasks** menu in the top-right corner and click on **Incomplete Requisitions**.
- Or click on **View Requisitions** on the left menu, then with your Down Arrow choose the Incomplete State and click **Search**.



Reassign a Requisition

If you are the buyer, you can reassign to a new buyer during the checkout process. To do this, scroll to the bottom of the Checkout Page, and select **Reassign**.



The screenshot shows a checkout interface with the following elements:

- Order receiving: Receive Manually (dropdown menu)
- Justification section with a scroll arrow
- Information message: The justification and attachments are for review by the approver. They will not be sent to the supplier.
- Justification text input field
- Justification Attachments section with a file upload icon and text: Drop files to attach. Size limit 50MB.
- Checkout buttons: Checkout, Save, Reassign (highlighted with a red box), and Cancel.

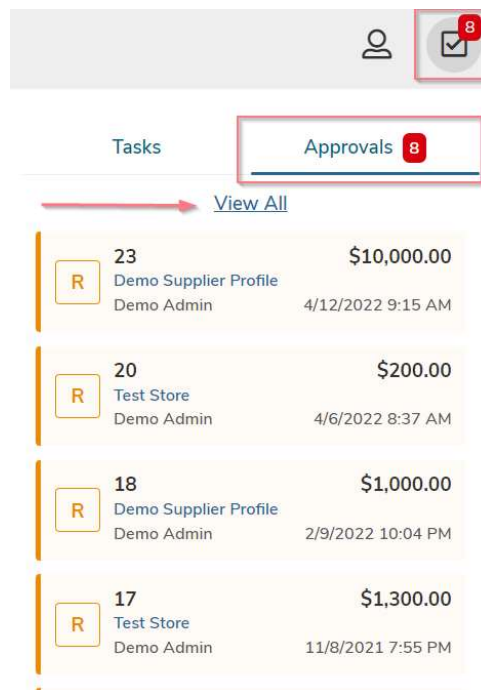
NOTE: Only the buyer can reassign a requisition.

Approvals

Approve a Requisition

To approve a requisition:

1. Go to the Tasks bar, then **Approvals** to find the correct requisition. If recent, the requisitions will appear within Approvals under the Tasks bar. Alternatively, select **View All** to see more requisitions that require approval.



2. Click on a requisition number to see the full requisition (This is recommended over clicking Approve/Decline in Approvals as it provides more information).

Approvals

① You are currently available and will receive approval requests.

[Change Availability »](#)

Requisitions **4** Invoices Expenses

Requisition Number: Buyer: Period: Last 90 Days

[Search](#)

Requisition	Buyer	Supplier	Type	Created Date	Total	
10	Demo Admin	Demo Supplier Profile	Standard	7/27/2021 2:43 AM	\$1,670.00	✓ Approve / Decline
9	Demo Admin	Demo Supplier Profile	Standard	7/9/2021 1:45 AM	\$4,000.00	✓ Approve / Decline
6	Demo Admin	Demo Supplier Profile	Standard	6/28/2021 8:39 PM	\$1,002.00	✓ Approve / Decline
5	Demo Admin	Demo Supplier Profile	Standard	6/27/2021 8:30 PM	\$1,670.00	✓ Approve / Decline

- Once inside the requisition, you should review the **Justifications** at the bottom of the requisition. Justifications help provide your approval with more information specific to the purchase request.


Items **Justification** Comments History

Type Justification

Justification During checkout, you may be asked to type in a Justification here.

Justifications help provide your approval with more information specific to the purchase request.

- After reviewing the requisition, Select **Approve/Decline** in the top-right corner of the requisition. If you are declining, a reason is required.

 **Requisition 10** Pending More Actions Approve / Decline ☰

Guide Community > Demo Supplier Profile

Requisition Date	7/27/2021 2:43 AM	Payment Type	On Account	Bill To	Ship To
Buyer	Demo Admin	Copy of Requisition	5	Demo Billing [Bill To]	
Organization Unit	help guide			123 Testing Street	
	⇒ help guide			Beverly Hills, CA 90210	
Visibility	Organization Unit Edit			United States	
				demoadmin@unimarket.com	

[Items](#) [Approvals](#) [Comments](#) [History](#)

Demo Supplier Profile Pricing

Product	State	Qty.	Price	Subtotal
---------	-------	------	-------	----------

- 5. Once you have approved the requisition, the requisition moves onto the next approver for approval or becomes an order.

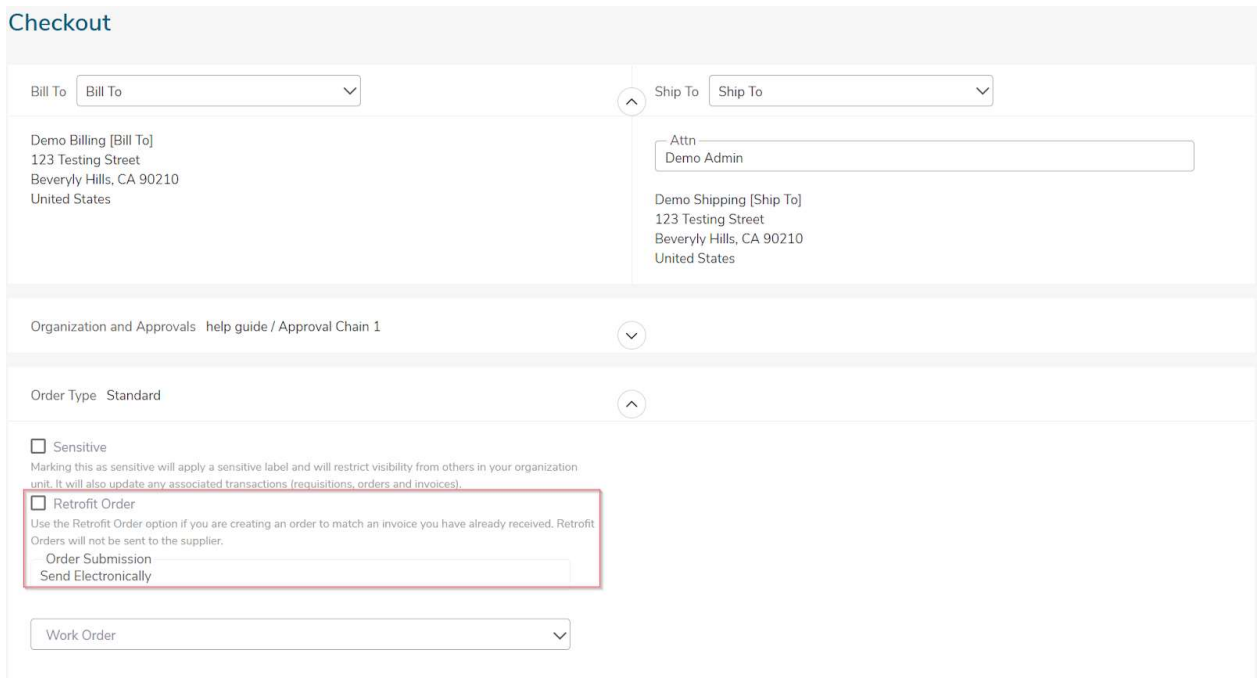
Retrofit Orders

Create a Retrofit Order

A retrofit order is used in cases where an order needs to be created in Unimarket after the fact. When checking out, check the box next to Retrofit Order under Order Type Standard. This is if you are creating an order to match an invoice you have already received. Retrofit Orders will not be sent to the supplier.

To create a Retrofit Order:

- On the checkout screen, click the section **Order Type** and select **Retrofit Order**.



The screenshot shows the checkout interface with the following sections:

- Checkout** header
- Bill To** dropdown menu (selected: Bill To)
- Ship To** dropdown menu (selected: Ship To)
- Address fields for Bill To: Demo Billing [Bill To], 123 Testing Street, Beverly Hills, CA 90210, United States
- Address fields for Ship To: Demo Shipping [Ship To], 123 Testing Street, Beverly Hills, CA 90210, United States
- Attn: Demo Admin
- Organization and Approvals: help guide / Approval Chain 1
- Order Type: Standard
- Sensitive (Marking this as sensitive will apply a sensitive label and will restrict visibility from others in your organization unit. It will also update any associated transactions (requisitions, orders and invoices).)
- Retrofit Order** (highlighted with a red box). Description: Use the Retrofit Order option if you are creating an order to match an invoice you have already received. Retrofit Orders will not be sent to the supplier.
- Order Submission: Send Electronically
- Work Order dropdown menu (selected: Work Order)

- Additional fields will appear including Related Invoice Number and Order Date (if enabled). Please note it will change the Order Submission field to Do not Send. For more information, check out the Unimarket HelpDesk page for [Creating a Retrofit Requisition](#).