Staples e-Procurement Ordering Process

1. Type StaplesAdvantage.com in your browser, click "Sign In" to enter your login information. Check "Keep me signed in" to reduce the number of times you are asked to login.

   a. If you forget your Account Number or User ID, click on "Forgot your Account Number or User ID?"

   b. If you can't remember your password, click on "Forgot your Password?" for assistance.

2. Select and/or search for the products you're looking for and add them to your cart.

3. Click the cart icon and select "Review Cart."

4. The "Review & Checkout" page will appear:

   a. Enter address details in the **Shipping & Delivery** section.

      i. Click the _Edit delivery details_ to add the building/room # in the "Address Detail" section and save changes if needed.

   b. The central billing card account will already be loaded on the site. Users do not need to enter their ProCard.

   c. In the **Accounting** section, UofL User ID field will automatically default to user's respective UofL User ID.

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d. Select **SpeedType options***

    i. Specify for each item –Select the SpeedType from the dropdown next to each item

    ii. Apply to entire order –select this SpeedType from the accounting section

e. Select **Account Code** from dropdown***

f. If you are unable to reallocate the way you need in Staples Advantage ordering site (see examples below), then leave the Accounting fields to the default SpeedType 30666 and Account Code 541200. If you do this, you will be notified by OnBase to go into the transaction and reallocate the charge within OnBase.

    i. Example 1: can only use one SpeedType per item, users may need to split the item between multiple SpeedTypes

    ii. Example 2: can only use one Account Code per order, users may need to split the order between multiple Accounts

*NOTE: If you are unsure of what SpeedType/Account Code to use for your purchase, reach out to your Unit Business Manager (UBM) or financial partner for assistance. Or you can leave the charges on the defaults and then be notified in OnBase to reallocate the transaction(s) there.

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If you have selected the default <u>SpeedType 30666</u> **and** <u>Account Code 541200</u>**, you will receive an OnBase notification once the transaction is available.**

Additional Review Required Queue - Staples - Procard Charge Transaction 24164071251105970499980. Please Review in Onbase

B BusinessOpsProcard@louisville.edu
To ● S0MCMI02@LOUISVILLE.EDU; ○ DLCOX006@louisville.edu
↩ Reply ↩ Reply All → Fo
Fri 9
ⓘ This message was sent with High importance.

Procard Staples charge transaction 24164071251105970499980 needs additional review. Please log in to Onbase Workflow to review the transaction in the Additional Review Required - Staples queue:

https://onbase.louisville.edu/onbase/Workflow/WFLogin.aspx?LifeCycleID=160&QueueID=1178&DocID=8999310

1. Login to OnBase:

   a. Click on link provided in email or go to this address: https://onbase.louisville.edu/onbase (do not use Edge browser)

   b. Log into OnBase using your University UserID and password.

2. Go to Transaction Processing:

   a. Click on 3 lines next to "Document Retrieval".

   b. Click on "Open Workflow".

   c. Life Cycle View is where all of the transactions will be worked. Pin Life Cycle View by clicking on the pin located at the top right of the menu screen.

   d. Click on the arrow next to 'FI-Procard - Transaction Processing". Available queues will appear.
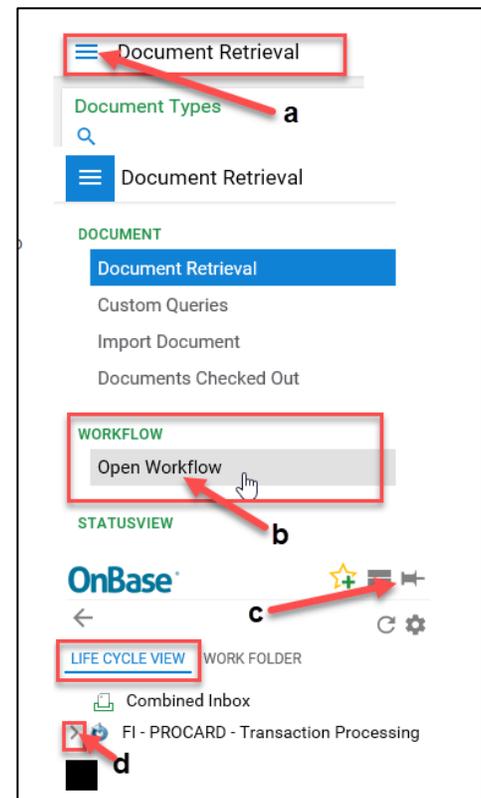
3. Display Pending Transactions:

   a. Click the name of the folder that in which transactions need to be worked. Your Staples transactions placed through the Staples Advantage site will be in the "Additional Review Required – Staples Orders" queue.
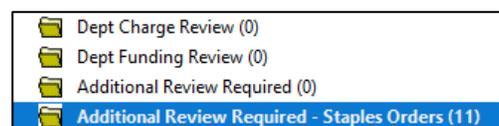
4. Select and Review Transactions:

    a. Upon selecting a transaction, the specific information will open in the bottom window.

    b. Transactions in this queue will automatically have a generic business purpose. Feel free to add additional details to the business purpose.

    c. Transactions in this queue will also already have a receipt attached.

    d. To view the receipt, go to the Document tab and select "Cross-References."

5. Funding (**REQUIRED**): The default SpeedType will show the invalid 30666 – STAPLES PROCARD CLEARING ACCT and will need to be updated to valid funded SpeedType(s) and proper account code(s).

    a. Under Funding Review click the box that says, "Reallocate Funding to Other SpeedTypes…"

    b. To reallocate type over the default SpeedType provided in the SpeedType box.

    c. Charges can be split by clicking the Add button.

6. Save your changed to the form and click the button 'Changes Made. Send Back to BUSINESS OPS.'