

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:

Review & Checkout [Add to list](#) [Print to pdf](#)

Shipping & Delivery

Shipping location
2211SBROOKST
UNIVERSITY OF LOUISVILLE
2211 S BROOK ST
LOUISVILLE, KY 40208 USA
[Select different shipping location](#)

Delivery details
BRITTANY SCHMITT
502-852-8218
Edit delivery details

Custom delivery date ⓘ
If you would like to choose a different date than is shown for the items in your cart, click the link below.
[Select custom delivery date](#)

Accounting

MUST CLICK CHANGE AND SELECT FROM DROPDOWNSpeedType options ⓘ
 Specify for each item Apply to entire order Overrides item selections

MUST CLICK CHANGE AND SELECT FROM DROPDOWNSpeedType
30666: STAPLES PROCARD CLEARING ACCT
[Change](#)

UofL User ID
BASCHM06

Account Code
541520: PRINTING SUPPLIES
[Change](#)

Order Summary

Items (1)	\$8.10
Minimum order fees	\$5.00
Pretax subtotal	\$13.10
Estimated tax ⓘ	\$0.00
Total	\$13.10

Consolidate small orders and save time, energy and money. [View detail](#)

Order will be paid through credit card

Submit Order

Edit address details ✕

Current shipping location
2211SBROOKST
UNIVERSITY OF LOUISVILLE
2211 S BROOK ST
LOUISVILLE, KY 40208 USA

Edit address

Deliver to name
BRITTANY SCHMITT

Address Detail
Houchens Bldg, Basement Floor, LL05

Phone number *
502-852-8218

Extension

[Feedback](#)

[Cancel](#) **Update**

- 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.

PROCUREMENT SERVICES QUICK START GUIDE

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

Review & Checkout [Add to list](#) [Print to PDF](#)

Shipping & Delivery

Shipping location
2211SBROOKST
UNIVERSITY OF LOUISVILLE
2211 S BROOK ST
LOUISVILLE, KY 40208 USA
[Select a different shipping location](#)

Delivery details
BRITTANY SCHMITT
502-852-8218
[Edit delivery details](#)

Custom delivery date [?](#)
If you would like to choose a different date than is shown for the items in your cart, click the link below.
[Select custom delivery date](#)

Accounting

MUST CLICK CHANGE AND SELECT FROM DROPDOWNSpeedType options

i Specify for each item ii Apply to entire order (Overrides item selections)

UofL User ID
BASCHM06

Account Code
541520: PRINTING SUPPLIES
[Change](#)

Order Summary

Items (2)	\$18.97
Minimum order fees	\$5.00
Pretax subtotal	\$23.97
Estimated tax ?	\$0.00
Total	\$23.97

Consolidate small orders and save time, energy and money. [View details](#)

Order will be paid through credit card

[Submit Order](#)

2 items in cart

Delivery

Group items by shipment

Avery TouchGuard Protection Heavy Duty 3" 3-Ring View Binder, White (17144)
Item #: 751488 | MFR #: 17144 | CN #: 751488
Delivery by Wednesday, Mar 09, 2022
[ON CONTRACT](#) [Save for later](#) [Remove](#)

Packing slip note

1 \$10.87 1/EA \$10.87

MUST CLICK CHANGE AND SELECT FROM DROPDOWNSpeedType
30666: STAPLES PROCARD CLEARING ACCT
[Change](#)

Staples Stickies Standard Notes, 3" x 3", 100 Sheets/Pad, 12 Pads/Pack (533YR12/52564)
Item #: 105809 | MFR #: 533YR12/52564 | CN #: 105809
Delivery by Wednesday, Mar 09, 2022 Delivery Pick up in store
[ON CONTRACT](#) [Save for later](#) [Remove](#)

Packing slip note

1 \$8.10 12/0Z \$8.10

MUST CLICK CHANGE AND SELECT FROM DROPDOWNSpeedType
30666: STAPLES PROCARD CLEARING ACCT
[Change](#)

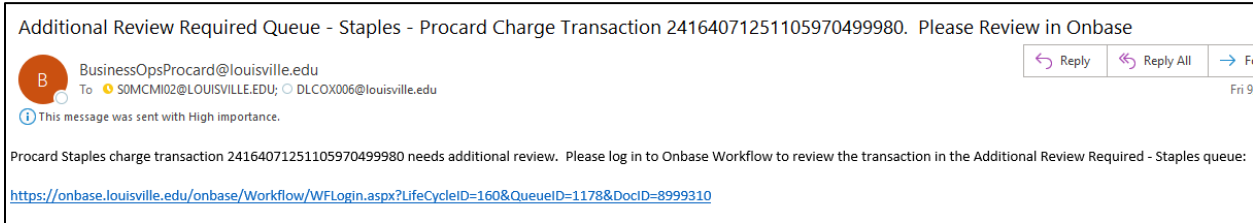
e. Select **Account Code** from dropdown*

- 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.**

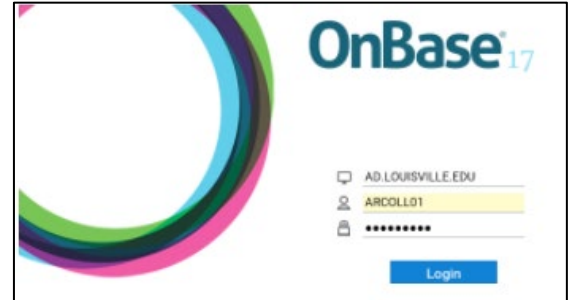
PROCUREMENT SERVICES QUICK START GUIDE

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



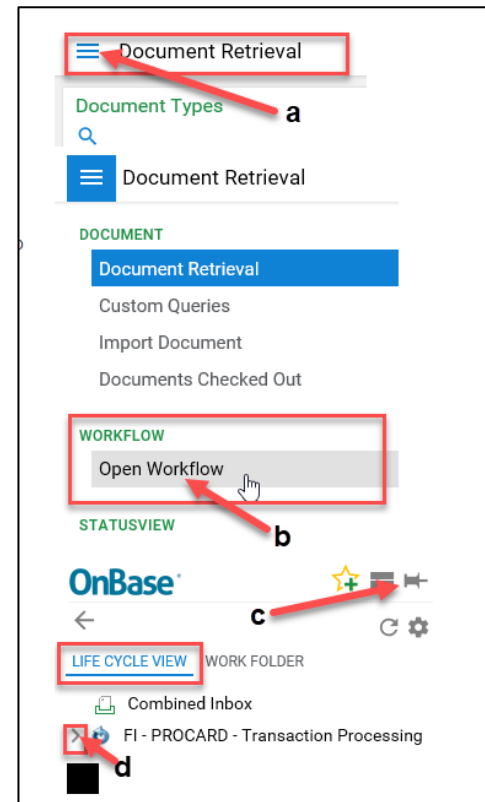
1. Login to OnBase:

- Click on link provided in email or go to this address:
<https://onbase.louisville.edu/onbase> (do not use Edge browser)
- Log into OnBase using your University UserID and password.



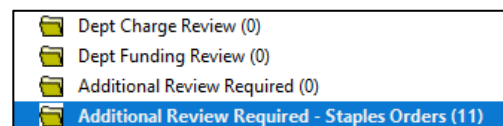
2. Go to Transaction Processing:

- Click on 3 lines next to “Document Retrieval”.
- Click on “Open Workflow”.
- 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.
- Click on the arrow next to ‘FI-Procard - Transaction Processing’. Available queues will appear.



3. Display Pending Transactions:

- 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.



PROCUREMENT SERVICES QUICK START GUIDE

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."

Transaction Number	Card	Card 4 digits	Amount	Merchant
24164071251105070344342	102445	2445	\$76.28	STAPLES
24164071251105070410986	102445	2445	\$63.48	STAPLES

Departmental Justification and Documentation

The Business Purpose is limited to 250 characters. It will be automatically truncated to 250 characters if it exceeds this amount.

Business Purpose
541100 - LABORATORY - Staples Order 7338822021000001

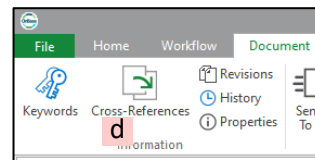
Charge Disputed

Attach Receipt (0)

Procard Charge Transaction - RECEIPT ONLY

Receipt is Attached

Receipt Not Available



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.

Funding

FUNDING REVIEW

No Funding Changes Needed – Use Default Speedtype and Default Account Code

Reallocate Funding to Other Speedtypes, or Change Account Codes

Reallocation Section

Amount	Speedtype	Speedtype Description	Account Code	BA Project
\$52.61	30666	MISC - STAPLES PROCARD CLEARING ACCT	541200 - OFFICE SUPPLIES	

Reallocation Total: \$52.61 MUST EQUAL Charge Amount: \$52.61

Amount Remaining to Allocate: 0.00

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

