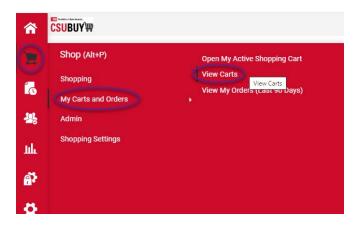## How-To Guide for End Users

- Login URL:
    - https://ds.calstate.edu/?svc=csubuy

- <mark>Updating your User Profile:</mark>
    - How to add a Pcard to your profile
        1. Click on View My Profile
        2. Navigate to Default User Settings → Payment Options
        3. Click Add a New Card and enter in the Pcard details
        4. To have your Pcard default in your shopping cart select "Default card"
    - How to add your favorite Requester(s) to your profile
        1. Click on View My Profile
        2. Navigate to Default User Settings → Cart Assignees
        3. Click Add Assignee and search for the appropriate requester(s)
        4. Multiple requesters can be added and you can select one as preferred (default)
    - How to add your favorite ship to address(es) to your profile
        1. Click on View My Profile
        2. Navigate to Default User Settings → Default Addresses
        3. Click Select Addresses for Profile and choose appropriate address(es)
        4. Choose the default box for the address you would like to default when checking out
    - How to update your system notifications
        1. Click on View My Profile
        2. Navigate to Notification Preferences
        3. Select Shopping Carts & Requisitions/ Purchase Orders
        4. Click on Edit Section
        5. Click Override on the field you want to update
        6. Select appropriate option from the dropdown
        7. Click Save Changes
- <mark>Shopping:</mark>
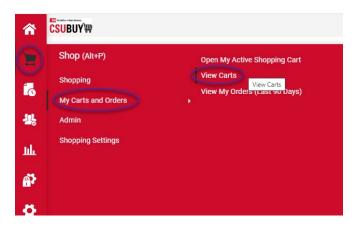   - How to create a cart
        1. Navigate to Shop → My Carts and Orders → View Carts

2. Click Create Cart

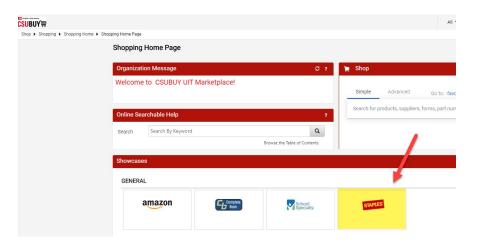- How to see your draft carts
    1. Navigate to Shop → My Carts and Orders → View Carts

2. Click Draft Carts

3. Select appropriate Shopping Cart Name to make that the active cart
4. Select the Action Dropdown to View, Activate or Delete the cart

o How to punchout to a supplier catalog
1. Navigate to the Home Page Menu Option
2. Look for the Punch-Out Catalogs Showcase
3. Click on the desired supplier
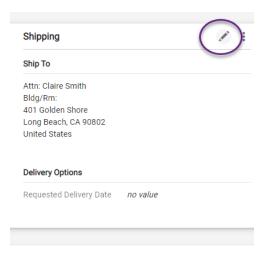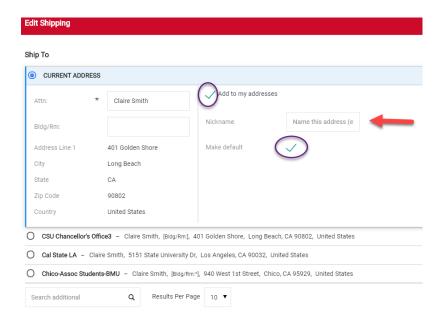

4. Click Cancel PunchOut to return to CSU BUY

-
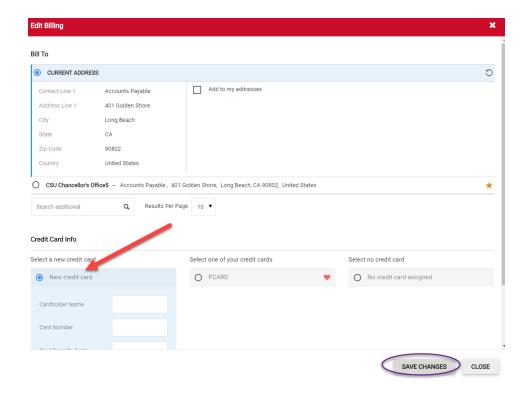 o How to add/edit your order's ship to address
  1. Click on Proceed to Checkout

2. Click the pencil icon on the shipping header
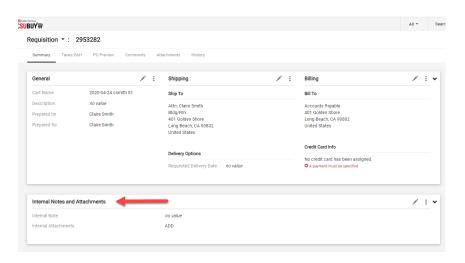
3. Click on Search additional to see available addresses
4. Select appropriate address, complete Blg/Rm
5. Click Add to my addresses
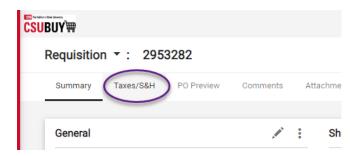6. Give it a nickname and make it your default if applicable
7. Save changes

o How to add your Pcard to your order
1. Click on Proceed to Checkout
2. Click the pencil icon on the billing header
3. Click New Credit card
4. Enter Cardholder Name, Card Number, Card Security Code and Expiration Date
5. Click add to your credit cards
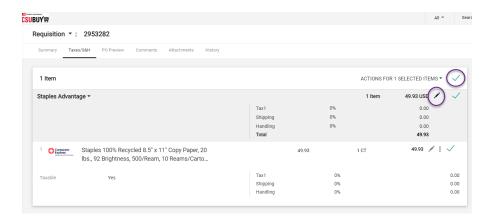6. Give it a nickname and default
7. Save Changes

- o How to add an internal note and/or attachment
  1. Click on proceed to checkout
  2. Click the pencil icon on the Internal Notes and Attachments Header
  3. Enter the note and save changes
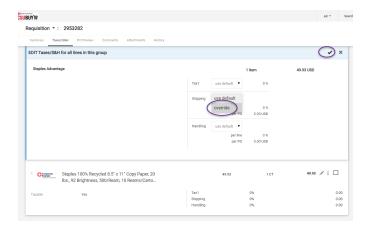 4. Click ADD and upload a file or link and save changes

- o How to add tax to your order
  1. Click on proceed to checkout
  2. Click on Taxes/S&H tab

3. Select the first pencil icon to edit all lines or click on the pencil icon for the appropriate line
4. Enter the tax percentage
5. Click the check mark in the header to save

o How to add shipping and handling to your order
   1. Click on Proceed to checkout
   2. Click on Taxes/S&H tab
   3. Click on override
   4. Select the first pencil icon to edit all lines or click on the pencil icon for the appropriate line
   5. Enter % or amount
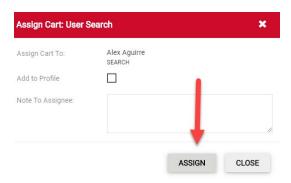   6. Click the check mark in the header to save

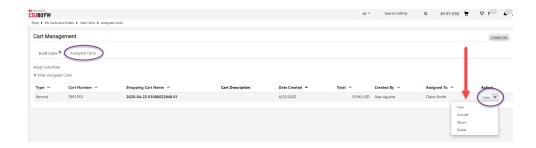o How to assign your cart to a Requester
   1. Click ASSIGN CART

   2. Click Select if you have your favorite requesters added to your profile or click search
   3. Select the appropriate requester by clicking **+**
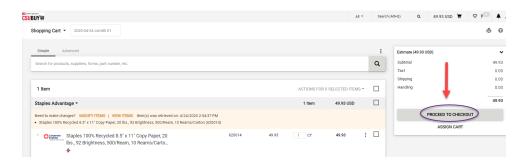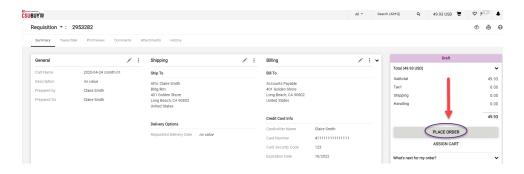

   4. Click ASSIGN

o How to accept a cart from a Shopper (Requesters only)
   1. Navigate to Shop → My Carts and Orders →View Carts →Assigned Carts or click on your actions items icon and choose Carts assigned to Me

   2. Click Shopping Cart Name to activate the cart or use the Action dropdown to view, return or delete

- How to submit your order
  1. Once your cart is final, click PROCEED TO CHECKOUT

  2. When all required data is complete click PLACE ORDER

- Reporting:
  - How to access your past orders
    1. Navigate to Orders → My Orders → My Purchase Orders
    2. Click Add Filter to narrow your results