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# Overview

## Introduction

Mustang Market is Western’s e-Procurement tool and is designed to provide you with the tools to easily access preferred vendor pricing, shop for items and request payments for goods and services incurred in the course of business at Western.

This guide provides the information and action steps that you will need to perform in Mustang Market with the role of Requisitioner.

## Objectives of this guide

The objectives of this guide are to provide:

- An overview of the shopping process
  - From item selection to vendor fulfillment
- The steps to select and submit items
  - Including items not found in the vendor catalogues
- Details about the approval process for requisitions to be submitted
  - How to view
  - Actions available to the Requisitioner

## How to use this guide

Refer to the table of contents to find the topic area you want details about, within each topic section you will find explanations, as well as step by step instructions that walk you through the task.

## Where to go for additional support

For additional support please go to the Financial Services training website: [https://www.uwo.ca/finance/training_reference/index.html#procuranchor1](https://www.uwo.ca/finance/training_reference/index.html#procuranchor1)

You can also send an email to: procurement@uwo.ca for questions / comments that are not addressed through other options.
Mustang Market Basics

Introduction

Mustang Market is Western’s web-based eProcurement solution for sourcing and purchasing goods and services.

Mustang Market interface

When you log in to Mustang Market you are taken to the Home page. The image below provides an overview of the homepage and points out key areas to help you navigate it.

The table below explains each of the main elements of the Mustang Market homepage.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>This is the title bar for Mustang Market, clicking on the header will return you to the homepage.</td>
</tr>
<tr>
<td>Banner</td>
<td>This area provides access to actions you need to take, messages, your active shopping cart, and key admin tasks such as profile setup.</td>
</tr>
<tr>
<td>Product Search</td>
<td>This area is also called ‘shop at the top’ and is one method for locating products in Mustang Market.</td>
</tr>
<tr>
<td>Navigation Bar</td>
<td>This is the main menu for accessing functions in Mustang Market, such as viewing documents or recent shopping carts.</td>
</tr>
<tr>
<td>Org. Message</td>
<td>This is the area where Western posts important messages for Mustang Market users. It also provides links to training materials.</td>
</tr>
<tr>
<td>Purchase Showcase</td>
<td>This is where preferred vendors are displayed. You can click on a vendor to search their catalogue (hosted) or access their site (punch-out).</td>
</tr>
</tbody>
</table>
The table below contains a description for each main menu items found on the Navigation Bar. Menu items displayed depend on your role and/or your specific permissions.

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Clicking on the Home icon will return the user to the site page that is configured as the homepage. The default is shopping home.</td>
</tr>
<tr>
<td>Shop Menu</td>
<td>The Shop menu contains the menu options related to shopping tasks including product quick search, access to the shopping page, forms and favourites. It is also where you can access carts and orders you have created, or have been shared / assigned to you.</td>
</tr>
<tr>
<td>Orders Menu</td>
<td>The Orders menu contains menu options related to searching for any type of document found in Mustang Market (Purchase Orders, Requisitions, Invoices, etc.) and also where you go to view your own orders, and if applicable, requisitions sent to you for approval.</td>
</tr>
</tbody>
</table>

**Definitions**

The table below provides a list of terms that are used in Mustang Market.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approver</td>
<td>A person with budgetary authority who ‘approves’ a requisition.</td>
</tr>
<tr>
<td>Assign</td>
<td>A term used to indicate that a draft cart has been sent to a Requisitioner to view and submit for approval, or an Approver has put a requisition into their folder to action.</td>
</tr>
<tr>
<td>Cheque Requisition</td>
<td>A cheque requisition is a request to have payment made for non-procurement related activities. For example: conference payments where Pcards are not accepted.</td>
</tr>
<tr>
<td>Hosted Catalogue</td>
<td>A vendor, whose catalogue of items with special pricing negotiated for Western, is viewable on Mustang Market.</td>
</tr>
<tr>
<td>Non-Catalogue Item</td>
<td>Items being purchased that cannot be found on Mustang Market or punch-out sites.</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>A purchase order is created once a requisition is approved. This is the formal order document sent to the vendor.</td>
</tr>
<tr>
<td>Punch-out Catalogue</td>
<td>A website that Mustang Market directs the user to, where items with Western pricing are displayed and available to select for purchase.</td>
</tr>
<tr>
<td>Requisitioner</td>
<td>A person who can shop AND submit a requisition for approval.</td>
</tr>
<tr>
<td>Requisition</td>
<td>Purchase requisition (PR) is the document created once the Requisitioner submits a ‘shopping cart’ for approval.</td>
</tr>
<tr>
<td>Shopper</td>
<td>A person who can ‘put items’ in a cart but cannot submit their own requisition.</td>
</tr>
<tr>
<td>Voucher/Invoice</td>
<td>A payment document tied to the purchase order.</td>
</tr>
<tr>
<td>Workflow</td>
<td>A term used to describe the steps a document goes through from start to finish, including approvals.</td>
</tr>
</tbody>
</table>
Mustang Market needs to use **mixed content** and **cookies** in order to provide the full functionality of the system. The following browsers are compatible with Mustang Market; however you may need to configure your browser to enable mixed content (explained below the list).

- Internet Explorer v11 and higher
- Firefox v23 and higher
- Chrome v21 and higher

### How to log in to Mustang Market

To log in to Mustang Market, go to the Western Financial Services webpage:

- [http://www.uwo.ca/finance/](http://www.uwo.ca/finance/)
  - Click on the Mustang Market button, found under ‘Login Tools’ on the right side of the page.
  - Log in using your: Western ID and Password
    - If you do not know this information, contact Western Technology Services.

**NOTE:** If you know your username and password, but cannot login, it may mean that you do not have access to Mustang Market. Please email procurement@uwo.ca for assistance in obtaining and submitting the required access form.

Do not bookmark the login page; there is a hidden re-direct that will prevent a bookmark from working. However, you can bookmark the finance webpage and then use the Mustang Market login button.
## A - Setting up your Mustang Market Profile

### Introduction

Before you begin shopping you need to set up your profile by adding default speedcodes, shipping addresses, etc. This will simplify the shopping process.

To set a default speedcode, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the **Person** icon from the banner  
      | - Select **View My Profile** from the menu |

![View My Profile](image1.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | Click **Default User Settings** from the menu on the left  
      | - Click **Custom Field and Accounting Code Defaults** |

![Custom Field and Accounting Code Defaults](image2.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Click the <strong>Code Favourites</strong> tab</td>
</tr>
</tbody>
</table>

![Code Favourites](image3.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Click <strong>Add</strong> above the Speedcode box</td>
</tr>
</tbody>
</table>

![Add Speedcode](image4.png)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>Click <strong>Select from profile values</strong> under speedcode</td>
</tr>
</tbody>
</table>

![Select from profile values](image5.png)
Click the drop down arrow
Select the value you want to make your favourite

OR
Type in your speedcode and account code manually:

<table>
<thead>
<tr>
<th>T001</th>
<th>622000</th>
</tr>
</thead>
</table>

Select from all values... Select from all values...

6. Click Select from profile values under Account
   - Enter a Description in the pop-up dialogue box
   - Click Search
   - Scroll and click select next to the account you want to add

7. Type in a Nickname for the default speedcode
   - Check the Default checkbox to set this as the default code
   - Click Save

---

To set a default shipping address, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on the Person icon from the banner&lt;br&gt;   Select View My Profile from the menu</td>
</tr>
<tr>
<td>2.</td>
<td>Click Default User Settings from the menu on the left</td>
</tr>
</tbody>
</table>
3. Click **Ship To** tab

4. Click **Select Addresses for Profile**

5. Enter the **first few letters of the location** you want to find, for example: for addresses in Social Sciences Centre, type 'soc'
   - Click **Search**

6. Click **Radio** button next to the appropriate address

7. Click **Default** to set the selected address as your default
   - Enter a **room number** (optional).
   - Click **Save**
Adding a cart assignee

There may be times when you want to assign your cart to another Requisitioner to review and submit on your behalf. You can search for and assign a Requisitioner when you are done shopping, or you can set up a default Requisitioner that is displayed for you to select.

To set up a default assignee, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click on the Person icon in the Banner area  
      - Select View My Profile |
| 2.   | Click Default User Settings from the menu on the left  
      - Click Cart Assignees |
| 3.   | Click Add Assignee from the ‘Cart Assignees’ area in the centre of the page  
      - Type in the name of the person you want to setup as an assignee in the ‘Last Name’ & ‘First Name’ fields  
      - Click Search |
4. Click **Select** next to the name of the person you want to assign

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>[select]</td>
</tr>
</tbody>
</table>

5. Click **Set as Preferred**, if you want that person to be your default assignee

- You can add multiple assignees, who will be available from a drop down menu when you are finished shopping and click ‘Assign’ cart.
B - Placing an Order

Introduction

There are many ways to shop in Mustang Market. You can go to specific vendor catalogues (hosted or punch-out), search across multiple catalogues, and use a form to purchase items that are: not found in the vendor catalogues, from vendors who are not setup in Mustang Market, or for services. The following pages provide information and the steps for these types of shopping. Read the intro above the steps for each to be sure that you are following the correct method for your purchase type.

Conducting a simple product search

The simple Product Search is used to search multiple vendor catalogues and is available from the Shopping Homepage of Mustang Market. The table below provides the steps to conduct a Simple Search.

Note: The search results will not include all punch-out vendor items as some punch-out catalogues are not loaded directly into Mustang Market.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click in the **Product Search** field  
|      |   - Type in a **product type**  
|      |     - Be as specific as possible to improve search results  
|      | For example: red pen is better than ‘pen’  
|      | ![beaker](image)  
| 2.   | Click the **magnifying glass**  
|      |   - Search results will display on a new page  
| 3.   | Beside the item you wish to purchase:  
|      |   - Update the **number of items**, if needed  
|      |     - Click **Add to Cart**  
|      | ![Add to Cart](image)  
|      | OR  
|      |   - Click the **item name** to see additional details about the item. |

Placing an order from a hosted or contract catalogue

When you click on a **Hosted or Contract Catalogue** vendor from the Purchase Showcase you are able to browse for products specific to that vendor within Mustang Market. To shop using a catalogue, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click on the **vendor sticker** from the Purchase Showcase  
|      | ![Hosted](image)  
| 2.   | Enter a **product** or **key word** in the Search field to look for a specific product type, or  
|      |     - Leave the **Search field** empty, to see all available products  

3. Beside the item you wish to purchase:
   - Update the **number of items**, if needed
   - Click **Add to Cart**

   OR
   - Click the **item name** to see additional details about the item.

4. **Follow the steps in the section ‘**Submitting your shopping cart**’ to complete the purchase, once you have selected all the items you need to purchase.**

---

**Placing an order from a punch-out catalogue**

When accessing a punch-out catalogue, you are automatically taken to the vendor’s ordering website. The website will show the appropriate products and pricing based on the contract with Western.

To shop from a punch-out site, follow the steps in the table below:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click on the **vendor sticker** from the Purchase Showcase  
      - You are redirected to the vendor’s webpage and recognized as being from Western |
| 2.   | Search for your **product(s)** |
| 3.   | Add the **item(s)** to your shopping cart |
| 4.   | **Checkout** from the vendor site once you have all the items you want  
      - Some sites may have a ‘transfer’ button in addition to check-out, follow the instructions to finalize the sale on the site  
      - This returns you to the Mustang Market with the items you selected from the punch-out site |
| 5.   | Follow the steps in the section ‘**Submitting your shopping cart**’ to complete the purchase, once you have selected all the items you need to purchase. |

---

**Submitting your shopping cart**

When you have added all of the items you want to your shopping cart in Mustang Market, you will need to submit it. This step will send it to an Approver to approve, if applicable, and will create the requisition number.
To submit a cart, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | There are 2 ways to submit your cart, you can either:  
  - Click on the **Shopping Cart** icon from the banner at the top  
    - Click on **Checkout** from the drop down menu  
  OR  
  - Click **Proceed to Checkout**, if you are already in the Shopping Cart view |
| 2.   | If you do not have default accounting codes setup, then:  
  On the ‘Requisition’, **Accounting Codes** section:  
  a) Click the **edit** icon  
     ![Edit icon]  
  b) Enter the codes directly into the fields or use the **magnifying glass** to search for a code  
     ![Magnifying glass]  
     ![Search icon]  
  c) Click the **recalculate / validate values** checkmark  
     ![Checkmark icon]  
     ![Validate values]  
  Click **Save** ![Save button] |
| 3.   | If you do not have a default shipping address setup, then:  
  On the ‘Requisition’, **Shipping/Billing** section:  
  a) Click the **edit** icon  
     ![Edit icon]  
  b) Scroll down, below your saved addresses, to the **Shipping address code** field  
  c) Enter the ‘name’ of the department or building  
    i. Note: these will likely be shorted. For example, to search for Chemistry, try searching “chem”).  
     ![Search bar]  
  d) Select the most relevant address.  
  e) Edit the ATTN and Room fields if applicable. You can also save the address for future use by clicking **Add to my addresses** ![Add to my addresses button] |
Placing an order for non-catalogue items or consulting services

The non-catalogue order forms should be used when you cannot find the item needed from the catalogues (hosted, contract, or punch-out). You can also use the non-catalogue forms when you are purchasing from a new vendor (one who is not yet on Mustang Market), or to create a purchase order for services.

There are two non-catalogue forms; they are based on the total amount of the purchase and/or type of purchase. The forms are identical with one exception: the over $25K/Consulting form has one extra section that needs to be completed: the Competitive Bid Requirements section.

**Do not use either form to submit an invoice for payment. Email the invoice to apinvoice@uwo.ca with the PO number on it. If a PO doesn't exist, submit the invoice on an Invoice Attached Form, refer to the ‘Invoice Attached – submitting an invoice for payment without a PO’ section for details.

To complete the Under $25K and Over $25K/Consulting forms follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the appropriate form, located near the bottom of the Purchase Showcase, select the:  
  •  <$25K Order Form for items totaling less than $25K (before tax)  
  •  >$25K / Consulting Order Form for items totaling $25K or more (before tax), or Consulting  
    o When you are acquiring consulting services, you must use the >$25K / Consulting form regardless of the amount of the engagement. All consulting services require competitive bidding prior to the purchase. |
| 2.   | Type the **first few letters** of vendor name in the Vendor Search Field  

<table>
<thead>
<tr>
<th>If the vendor is...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available in Mustang Market</td>
<td>Select the vendor from the list that appears and continue to step #3.</td>
</tr>
</tbody>
</table>

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Not found / new in Mustang Market

If the vendor is not found, type **new vendor** in the field and select **New Vendor** from the list.

Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section **How to enter a new vendor** for details.

### New Vendor Details

- **Select New Vendor in the Enter Vendor field under the Non-Catalogue Item Details section.**
- **Vendor’s Legal Name**
- **‘Doing Business As’ Name**
- **GST/HST Reg #**
- **Conflict of Interest**
  - Is there an actual or perceived conflict of interest vendor?
- **Vendor Payment Method**
  - EFT or Wire
  - Cheque

Vendor will be contacted directly to arrange EFT or Wire payments.

---

3. For new vendors: select the **Currency**, from drop down (existing vendors will have this pre-filled)

4. Enter a **Product Description** to indicate what item you are purchasing
   
   Note: you can only enter ONE item per order form.

5. Enter the **Catalogue number**, if known

6. Enter the **number of the items** you are purchasing in the **Quantity** field

7. Enter the **total price** in the **Estimated Price** field, this is the amount before tax

8. Select the **Packaging** option from the drop down menu
   - This is the unit of measurement (i.e. each, box.)

9. Select a **Commodity Code** from the drop down menu
   - This is a code that represents a category for the item you are purchasing. For example: office supplies, computer equipment, science equipment.
10. **Select applicable Health & Safety information related to the item.**

   - Radioactive, hazardous, and controlled substances must be indicated on the form by selecting the appropriate Health and Safety checkbox.
   - Radioactive orders require a Permit Number to be entered on the Requisition Summary screen and a Chemistry ship-to address must be selected during the checkout process.
     - For details about adding a shipping address, refer to ‘Submitting your shopping cart’

11. **Select a response to the accessibility consideration question.**

   - Provide an explanation for your selection in the comments field below the selection.

12. **Click Add Attachment under External Attachments to attach any forms you need to send to the vendor (such as quotes or contracts).**

    *External attachments are for any documents to be sent to the vendor.*

    **Do not use this form to submit an invoice:**

    External Attachments

    *Note: Internal comments can be added on the Requisition's Summary screen during the check-out process.*

13. **Complete the Competitive Bid Requirement section for all consulting (regardless of dollar value) or total purchase over $25K.** For details about this requirement refer to: [https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html](https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html)

    To complete the competitive bid section on the form:
    - Select either:
      - **Quotes on File** if you obtained the minimum number required by the purchase amount.
      - **Exception** if you have a valid reason for not requiring multiple quotes.
For further details about either requirement, go to: https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html

Add Comments related to the quote or exception in the box below, for example for:
- **Quotes on file**: indicate the number of quotes obtained
- **Exception**: enter the exception reason.

**Ensure you attach the successful quote to the form to send it to the vendor along with the PO document, see step #12 above.**

14. **To add the form to your shopping cart:**

<table>
<thead>
<tr>
<th>If you are...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not purchasing another item from that vendor</td>
<td>Click <strong>Add And Go To Cart</strong> at the top, right of the form.</td>
</tr>
<tr>
<td>Purchasing another item from the same vendor</td>
<td>Select <strong>Add to Cart and Return</strong> at the top right of the form,</td>
</tr>
<tr>
<td></td>
<td>- This adds the form to your cart and open up another form with the same vendor already selected.</td>
</tr>
<tr>
<td></td>
<td>- Click on the down arrow and select “Add to Cart and Return”</td>
</tr>
<tr>
<td></td>
<td>- Return to step #4 and complete the form</td>
</tr>
</tbody>
</table>

15. **Click Proceed to Checkout**

**Proceed to Checkout**

16. **From the Requisition tab, enter the Accounting Codes and Shipping Address** if you do not have defaults set up.

- Refer to ‘Submitting your shopping cart’ in this guide, for details on how to do both steps.
Creating a standing order

Standing Orders may be issued to repeatedly purchase a product or service from the same vendor over the course of a fiscal year, if the quantity and/or cost is unknown. The standing order PO is set up with the vendor who will submit invoices against the PO.

- Note: To make a change to a standing order, use the Change Order Request form.

To create a standing order, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Complete either the **Under $25K** or **Over $25K/Consulting** Order Form to initiate a standing order.  
- In the **Product Description** field, enter “SO” before the description of the product or service  
- Select from only one vendor for standing orders |
| 2.   | Click **Proceed to Checkout** from the top of the screen |
| 3.   | Click the **Edit** icon in the General section of the Summary tab  
- Scroll down to Standing Order |
| 4.   | Click the arrow to edit  
- Select **Yes** from the drop down menu |
| 5.   | Click **Save**  
- Enter details outlining the frequency of the standing order in the **External Notes** section of the header, if applicable  
Note: Refer to the section ‘Adding external notes and attachments (Vendors)’ for details about using this field. |
| 6.   | IF there was a prior years’s PO number then:  
- Under Internal Notes, select **edit**  
- Enter the prior year’s **PO number**, if applicable, and any **other notes**  
- Click **Save**  
- Enter details outlining the frequency of the standing order in the **Internal Notes and Attachments** section of the header, if applicable |

17. Click **Submit Requisition** from the top right of the screen to send your requisition for approval.
7. To set up a standing order for the next fiscal budget year, change the **Accounting Date** field (**General** section) to May 1\(^{st}\) of that year:

![Edit General](image)

8. Enter the **Accounting Codes** and **Shipping Address** if you do not have defaults setup.

Refer to ‘**Submitting your shopping cart**’ in this guide, for details on how to do both steps.

9. Click **Submit Requisition**

![Submit Requisition](image)
C - Ways to Request Payment or Change an Order

Introduction

In the Forms section of the Purchase Showcase, there are forms that you use when you need to: request payment for goods / services already received without a purchase order, when you want to request payment for a non-procurement related activity, or need to change an order that has already completed workflow. These forms are:

- Change Order
- Invoice Attached
- Cheque Requisition

Change Order – requesting a change to your purchase order

Use the Change Order Request form to make a change to an existing purchase order or standing order, do not use this form to cancel an order.

To cancel an order, first cancel with the vendor and then email procurement@uwo.ca with the PO number and reason for cancellation.

To submit a change order, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click Change Order Request, found under ‘Forms’ on the Purchase Showcase</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the original Purchase Order Number</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the Vendor Name</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the New PO Total</td>
</tr>
<tr>
<td>5.</td>
<td>Select a response to Send Revised PO to Vendor, using the drop down menu to indicate whether or not to send the revised PO to the vendor</td>
</tr>
<tr>
<td>3.</td>
<td>Select the applicable check box(es) in the Change Order Request Details section, on the right of the form, to indicate the changes that need to be made to the original order.</td>
</tr>
<tr>
<td></td>
<td>Enter a description in the field below the check boxes to provide additional details about the order</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Click **Add and go to Cart** from the top right of the form, once it is complete.
   - Click **Go**

5. **Click Proceed to Checkout**

6. Enter the **Accounting Codes** and **Shipping Address** if you do not have defaults set up.

   Refer to ‘**Submitting your shopping cart**’ in this guide, for details on how to do both steps.

7. **Click Submit Requisition** from the top right of the screen

---

Invoice Attached – submitting an invoice for payment without a PO

There are times when you have to obtain service prior to generating a requisition and purchase order in Mustang Market; for example an emergency repair. In these cases, use an **Invoice Attached** form to submit an invoice for payment.

**Note:** If a Purchase Order was created ahead of time and you still received the invoice from the vendor, email the invoice to [apinvoice@uwo.ca](mailto:apinvoice@uwo.ca) and indicate the PO number associated with it. Do not use the Invoice Attached form to submit it.

To submit an Invoice Attached form, follow the steps in the table on the next page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click <strong>Invoice Attached</strong>, found under 'Forms' on the Purchase Showcase</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the <strong>first few letters</strong> of the vendor name in the <strong>Enter Vendor</strong> field and:</td>
</tr>
<tr>
<td></td>
<td><strong>If the vendor is...</strong></td>
</tr>
<tr>
<td></td>
<td>Available in Mustang Market</td>
</tr>
<tr>
<td></td>
<td>Not found / new Mustang Market</td>
</tr>
<tr>
<td></td>
<td>Complete as much of the New Vendor portion (right side of the form) as possible, refer to the section <strong>How to enter a new vendor</strong> for details.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the <strong>Invoice Amount</strong>, this is the amount before taxes</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the <strong>Supplier Invoice No.</strong></td>
</tr>
</tbody>
</table>
| 5.   | Enter the **Product Description**  
• This is where you indicate what you purchased |
6. Enter the **number of items** you have purchased in the **Quantity** field

<table>
<thead>
<tr>
<th>Product Description *</th>
</tr>
</thead>
<tbody>
<tr>
<td>expand/clear</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity *</th>
</tr>
</thead>
</table>

7. Select the **Commodity Code** from the drop down menu
- This is the category of the item purchased, i.e. office supplies, computing equipment

<table>
<thead>
<tr>
<th>Catalogue No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>M307 - Supplies-Heat/Refrig</td>
</tr>
<tr>
<td>M308 - Supplies-Plumbing</td>
</tr>
<tr>
<td>M309 - Supplies-Cleaning</td>
</tr>
<tr>
<td>M409 - Supplies-Office Products</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity *</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Commodity Code *</th>
</tr>
</thead>
</table>

8. Select a response to the **accessibility consideration**
- Explain your selection in the comments box below

<table>
<thead>
<tr>
<th>Have you considered accessibility criteria and features in this purchase? *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Explain</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Explain *</th>
</tr>
</thead>
</table>

9. Click **Add** beside **Internal Attachments**
- Attach the **invoice** from the vendor

<table>
<thead>
<tr>
<th>Internal Attachments *</th>
</tr>
</thead>
</table>

10. Select a **Reason Code** to indicate why a payment is being made without a **Purchase Order**
- Add an **explanation** in the **Explanation** field to provide details to support your Reason Code

<table>
<thead>
<tr>
<th>Reason Code *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Please select..</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Explanation *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reimbursement to Company or Affiliates (i.e. salaries, travel, lab fees)</td>
</tr>
<tr>
<td>Urgent Request to Vendor</td>
</tr>
<tr>
<td>Deposit or Advance Payment Required</td>
</tr>
<tr>
<td>Registration or Membership Fee</td>
</tr>
</tbody>
</table>

11. Complete the **Competitive Bid Requirement** section for **all consulting or items over $25K**:
- Select either:
  - **Quotes on File** if you obtained the minimum number required by the purchase amount.
  - **Exception** if you have been granted an exception by Procurement and do not require quotes.
    - For further details about either requirement, go to: [https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html](https://www.uwo.ca/finance/procurement/preparing_buy/competitive_bid_process.html)

- Input **Comments** related to the quote or exception in the box below
  - **Quotes on file**: indicate the number of quotes obtained
  - **Exception**: enter a valid reason for not requiring multiple quotes

- You should attach the successful quote to the form to send it to the vendor along with the PO document, refer to step #9 for details.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>Click <strong>Add And Go To Cart</strong> from the top of the form, once the form is complete</td>
</tr>
<tr>
<td>13</td>
<td>Click <strong>Proceed to Checkout</strong></td>
</tr>
<tr>
<td>14</td>
<td>Enter the <strong>Accounting Codes</strong> and <strong>Shipping Address</strong> if you do not have defaults setup. Refer to ‘Submitting your shopping cart’ in this guide, for details on how to do both steps.</td>
</tr>
<tr>
<td>15</td>
<td>Click <strong>Submit Requisition</strong> from the top right of the screen</td>
</tr>
</tbody>
</table>
A Cheque Requisition can be used to request payment for a non-procurement related activity or service. Refer to the list of permissible uses on the form.

To complete this form, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the Cheque Requisition form, found under ‘Forms’ on the Purchase Showcase</td>
</tr>
</tbody>
</table>
| 2.   | Type the first few letters of the vendor name in the Vendor field  
  - Type New Vendor if the vendor is not already in Mustang Market |
| 3.   | For new vendors, enter the Vendor Details  
  ![Vendor Details](image)  
  - Respond to the conflict of interest question using the drop down arrow, for details refer to the COI information found at: [https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html](https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html) |
| 4.   | Enter the Payment Total, after taxes  
  Payment Total (including tax) |
| 5.   | Select the applicable Tax Included option  
  ![Tax Included](image) |
| 6.   | Select the Mail Cheque option that is applicable  
  ![Mail Cheque](image) |
| 7.   | Enter the Special Handling Instructions, if applicable  
  ![Special Handling Instructions](image) |
| 8.   | Enter the Product Description to indicate what good/service was purchased |
9. Click Add Attachments:
   - Under Internal to send relevant documents to Accounts Payable

10. Click Add and go to Cart from the top right of the form
    - This takes you back to the shopping cart view

11. Click Proceed to Checkout

12. Enter the Accounting Codes and Shipping Address if you do not have default setup.
    Refer to ‘Submitting your shopping cart’ in this guide, for details on how to do both steps.

13. Click Submit Requisition from the top right of the screen

---

**D – Adding Notes, Attachments & Special Requests to Orders**

**Introduction**

Some orders in Mustang Market may not follow standard processes and in these cases you will need to add notes or attachments for Financial Services, the vendor or others in your department who review / approve the order.

Some examples of this might be:
- Adding a note or attachment for Procurement or Accounts Payable
- Sending the vendor an attachment
- Attaching a note to the order for the approver
- Requesting that a payment is made in a different way than is setup on the system

This section provides the steps to add these types of special requests on your order or payment request.

**Adding Internal notes and**

Internal notes are used to communicate to Procurement and Accounts Payable. You might use this to indicate payment or tax handling instructions.
Internal attachments are not shared with the vendor, but can also be viewed by the Requisitioner and Approver on the order.

To add internal notes or attachments follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on the ‘Requisition’, <strong>Summary</strong> tab, after proceeding to checkout, <strong>Requisition</strong>&lt;br&gt;<strong>Summary</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Scroll down to the <strong>Internal Notes and Attachments section</strong>&lt;br&gt;- Click the <strong>edit</strong> icon to add an internal note.&lt;br&gt;- Type in your note&lt;br&gt;- Click <strong>Save</strong>.&lt;br&gt;Click <strong>Add</strong> to add an internal attachment.</td>
</tr>
</tbody>
</table>

External notes are used to communicate to the vendor. You might use this to include instructions or more information on your order, such as delivery instructions or customer account numbers.

External attachments might be used to send a quote or contract document to the vendor, along with your purchase order.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click on the ‘Requisition’, <strong>Summary</strong> tab, after proceeding to checkout, <strong>Requisition</strong>&lt;br&gt;<strong>Summary</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Scroll down to the <strong>External Notes and Attachments section</strong>&lt;br&gt;- Click the <strong>edit</strong> icon to add an external note.&lt;br&gt;- Type in your note&lt;br&gt;- Click <strong>Save</strong>&lt;br&gt;Click <strong>Add</strong> to add an external attachment.</td>
</tr>
</tbody>
</table>

Comments can be added to purchase requisitions, purchase orders, and vouchers. Comments provide a way for users to communicate any questions or directions they have to other users. Any user in Mustang Market can be added as a recipient.
To add comments to a requisition, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Comments</strong> tab, after proceeding to checkout and entering the Accounting Codes and Shipping/Billing address.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the + button to add a comment</td>
</tr>
</tbody>
</table>
| 3.   | Click **checkboxes** for the users that you would like notified of the comment via email.  
  - Click **add recipient** to add someone additional |
| 4.   | Enter the **Comments** in the text box  
  - Max 1,000 characters |
| 5.   | Attach a **file**, if applicable |
| 6.   | Click the checkmark to save the comment  
  - The appropriate people will be emailed  
  - If an attachment was added on the comments tab, the number of attachments will be indicated on the attachment tab |
| 7.   | Click **Submit Requisition** |

There are some instances where a requisition may need to be reviewed by Procurement. To send a requisition to Procurement, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the Requisition, <strong>Summary</strong> tab</td>
</tr>
</tbody>
</table>

Requesting alternative payment methods or change in taxes
- Click the edit icon beside the **General** section and scroll down to the **Procurement Request** section

2. Click the appropriate box(es):

<table>
<thead>
<tr>
<th>If….</th>
<th>Then….</th>
</tr>
</thead>
<tbody>
<tr>
<td>A tax exception applies to the order (i.e. order is for books, newspapers, salaries)</td>
<td>Click <strong>Send for Tax Review</strong></td>
</tr>
<tr>
<td>You need an alternative payment method (i.e. vendor does not accept PO’s), or the order is for a research item</td>
<td>Click <strong>Send for Review</strong></td>
</tr>
</tbody>
</table>

3. **Click** **Save**

4. Scroll down to **Internal Notes and Attachments**
   - Click the **edit** icon
   - Add a note to indicate the reason this checkbox was selected.
   - Click **Save**

5. **Click** **Submit the Requisition**
E - Ordering from a New Vendor or Making Changes to an Existing Vendor

Introduction

A vendor will need to be entered as a “New Vendor” when you complete any order form if:
- The vendor cannot be found in the Mustang Market database
- There are changes to vendor information (address, payment, contact, etc.)

How to enter a new vendor

To enter a new vendor, select the applicable form and follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Type in “new vendor” in the ‘Enter Vendor’ field  
      - Select New Vendor from the drop down menu |
| 2.   | On the right side of the form under the New Vendor Details section:  
      - Complete as much information as possible. Missing information will delay setting up the new vendor.  
        - Vendor Name  
        - GST/HST Reg#  
        - Conflict of Interest (COI) – for details about COI, refer to the COI information found at:  
          [https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html](https://www.uwo.ca/finance/procurement/ethical_procurement_practices.html)  
        - Preferred Payment Method*  
        - Vendor Payment Address  
        - Vendor Contact Information  
      *Procurement Services will contact the vendor directly to obtain required banking information. Please do not email or attach this information (unless included on an invoice). |
| 3.   | Complete the rest of the form  
      - Refer to the applicable topic in the Table of Contents for details about completing the specific form you are completing. |
| 4.   | Click Add and go to Cart from the top of the page  
      - This takes you back to the shopping cart view |
| 5.   | Click Submit Requisition |
To make a change to an existing vendor, open the applicable form and follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | In the **Enter Vendor** field, type in “new vendor”  
   - Select **New Vendor** from the drop down list |
|      | ![Enter Vendor](image) |
| 2.   | On the right side of the form under the **New Vendor Details** section,  
   - Enter the existing vendor’s vendor name and number/ID in the vendor name field.  
   - Indicate the information that has changed in the appropriate field(s). |
|      | ![New Vendor Details](image) |
| 3.   | Click **Add and go to Cart** from the top of the page  
   - This takes you back to the shopping cart view |
| 4.   | From the ‘Requisition’, **Summary Tab**  
   - **Requisition**  
     - **Summary**  
     - Add **Internal Notes** to further explain the change, refer to the ‘**Adding Internal Notes**’ section for details. |
| 5.   | Click **Submit Requisition**  
   - ![Submit Requisition](image) |
F - Other Tools to Simplify Shopping

Introduction

A few tools can simplify the shopping experience:
- sharing a single cart across a department can consolidate orders,
- copying a cart reduces the need to look up items again,
- using multiple speedcodes and / or accounts on an order, or for each item and
- adding commonly purchased items to Favourites folder can speed up the purchase process.

The steps for each of these tasks can be found in the following section.

How to share a cart

You can share a cart at any time during the shopping process. To share a cart, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the **Shopping Cart** icon, from the Banner menu  
|      | • Click on **View My Cart** |

2. Click on the action menu ( … )  
• Click **Share my cart with** and select the group’s name

• Click **Unlock**, from the top right of the screen, so others will be able to use the cart

Note: When you share a cart it will be saved and accessible from the **Shared Carts** tab, after you click the **Shop** menu and select ‘**My Carts and Orders**’, and then select, ‘**View Carts**’.

Creating another group to share a cart / edit existing group

To create another Group to share a cart with, or edit the original group, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the **Shopping Cart** icon, from the Navigation Bar  
|      | • Select **Admin**, then **Manage Groups for Shared Carts** |
2. **Click Create New Group**

3. **Type a Name for the Shared Cart**

   ![Name Input Field](image)

4. | **If you want to add** | **Then…** |
   |----------------------|-----------|
   | Individual users     | **Click User**
   |                      |   - Type the “last name” of the user(s) you want to add
   |                      |   - Click **Search**
   |                      |   - Click **select** to the right of the name(s)
   |                      |   - Click **Add Selected Users**
   | An entire department | **Click Department**
   |                      |   - Select **Department Name** from the drop down list

5. **Click Save**

---

Creating a list of frequently purchased items (favourites)

There may be some items you frequently need to purchase; these items can be added to a list of favourites so that you can easily add them to a cart, instead of looking them up each time.

The first time you add something to favourites you will have to set up a folder for it to go into. You can add additional folders at any time; this is a great way to separate out item types.

To create a list of favourites follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | From a Shopping Cart
   |   • **Click Add to Favourites** beside the item you want to put in a favourites list
   |   ![Unit Price, Quantity, Ext. Price Table]
   |   • **Click Add to Favourites**
| 2.   | **Click New** folder icon
   |   • **Top level personal folder**
   |   o those with permission can also add Shared folders to be used across departments
   |   ![Top level personal folder]
   |   ![Top level shared folder]
   |   ![Subfolder of selected folder]
   |   ![Create New]

**NOTE:** Once you create a top level folder under personal, you can create subfolders
3. Type a **Name** for the folder
   - Click **Save Changes**

4. Click on the **new folder** created
   - Click **Save Changes**
   - The item selected is added to the favourites folder.

5. Click **Close** and continue shopping

---

**Copying an order**

There may be times when most or all of a purchase is going to be repeated, when this is the case, you can copy the purchase requisition instead of searching for each item again. Once you copy the requisition, you can add additional items, or remove items you don’t want.

Note: This works for hosted vendors and form orders, it does **not** work for most punch-out vendors.

To copy a requisition, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Hover over the **Shop** icon in the Navigation Bar  
       - Select **My Carts and Orders**  
       - Select **View My Orders** |
| 2.   | Click on the **Requisition Number** for the cart you want to copy  
       - Look at the vendor details, date, and total cost to help you select the correct cart |
| 3.   | Select **Copy to New Cart** from the actions menu at the top right of the Requisition page |
Using different speedcodes for each item in the same order

NOTE: You can also use document search / orders to look up a requisition, once you have located the requisition you want to copy, follow steps 2-4 above.

When you want to charge a specific item(s) to a different account or speedcode than the rest of the order you have to add the account and speedcode to each line.

To attach different speedcodes / accounts to items follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Shop the site as normal, when you are finished:</td>
</tr>
<tr>
<td></td>
<td>- Click Proceed to checkout</td>
</tr>
<tr>
<td>2.</td>
<td>Click on the 'Requisition', Summary tab, after proceeding to checkout,</td>
</tr>
<tr>
<td></td>
<td>Requisition</td>
</tr>
<tr>
<td></td>
<td>Summary</td>
</tr>
<tr>
<td>3.</td>
<td>Scroll down to the first line item</td>
</tr>
<tr>
<td></td>
<td>- Click the Edit menu for the line and select Accounting Codes</td>
</tr>
<tr>
<td></td>
<td>Items</td>
</tr>
<tr>
<td></td>
<td>Item Details</td>
</tr>
<tr>
<td></td>
<td>Item Details</td>
</tr>
<tr>
<td></td>
<td>Accounting Codes</td>
</tr>
<tr>
<td>4.</td>
<td>Enter the Speedcode and Account for that item</td>
</tr>
<tr>
<td></td>
<td>- Click recalculate / validate value</td>
</tr>
<tr>
<td></td>
<td>- Click Save</td>
</tr>
<tr>
<td>5.</td>
<td>Repeat Step #3 &amp; 4 until all of the items have speedcodes and accounts attached to them</td>
</tr>
<tr>
<td>6.</td>
<td>Click Submit Requisition</td>
</tr>
</tbody>
</table>

Submit Requisition
NOTE: When you use different speedcodes in one order, the order may need to go to different Approvers and will automatically be directed. If multiple approvers are required, the order may take longer to approve and be sent to the vendor to fulfill. Refer to the section "Finding the status of the requisition" to see where it is the approval process.

Carts and Requisitions can be split between different speedcode/accounts at the header level, meaning that the entire cost of the entire order will be distributed to two or more accounts / speedcodes.

For example:
- If a requisition subtotal is $9000 and one account has $4000 left in it, the order can be split with $4000 applied to the limited account and $5000 applied to another account,
  - You can also allocate cost using percentages of the requisition subtotal

To create a split, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Shop the site as normal, when you are finished: Click <strong>Proceed to checkout</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Edit</strong> icon in the Accounting Codes section</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Add Split</strong> icon (plus sign) on the far right of the Speedcode window</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>% of Price</strong> drop down, select:</td>
</tr>
<tr>
<td></td>
<td>- <strong>% of Quantity</strong></td>
</tr>
<tr>
<td></td>
<td>- <strong>Amount of Price</strong> or</td>
</tr>
<tr>
<td></td>
<td>- <strong>% of Price</strong>, depending upon the split type you want to enter</td>
</tr>
<tr>
<td></td>
<td>NOTE: you need to calculate the exact dollar / % / quantity for ALL splits, the system will not enter the 'remainder' in to the last line.</td>
</tr>
<tr>
<td>4.</td>
<td>Enter new <strong>Speedcode</strong>, and / or <strong>Account</strong> if needed, and</td>
</tr>
<tr>
<td></td>
<td>- <strong>% / Amount / Quantity</strong> beside each line</td>
</tr>
<tr>
<td></td>
<td><img src="image1" alt="Image" /></td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Image" /></td>
</tr>
<tr>
<td>5.</td>
<td>Click <strong>Save</strong></td>
</tr>
</tbody>
</table>
| 6.   | Click **Submit Requisition**

Selecting an off-campus address if the ship-to address is not available under the organizational options, you may select the “Off-Campus” option to enter a custom address. Please note that all orders with this address code will be sent to Procurement for review.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>On the Requisition Summary screen, select the <strong>edit</strong> icon beside the <strong>Shipping/Billing</strong> section.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | Scroll down to the **Shipping address code** field and then:  
  - Type in “off-campus” and click on the option that pops up  |

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>[Off-Campus Deliveries - [ATTN:*], [Room]</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>off-campus</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Shipping address code</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td>Enter the ship-to address information. * fields are mandatory. Once completed, click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>
G - Finding and Re-submitting Returned Requisitions

Introduction

When your requisition is returned, you will receive details explaining the reason. You can open up the requisition, amend it and re-submit it for approval. There may be times when you want Procurement to review your order as well. This section outlines details for each situation and the steps to take.

Why a requisition may be returned to you

The system may automatically return a requisition for a number of reasons, including:

- No budget set up for speedcode/account code combination
- Requisition is over $25K but the Competitive Bid Requirements section was not completed
- Requisition is returned to you by the assigned Requisitioner, by your Approver, or by Procurement

When a requisition is returned, you will receive an email with the reason. You can also view the reason on the History tab of the requisition document.

Finding and re-submitting a returned requisition

To locate a returned requisition, follow the steps listed in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the Shopping Cart icon on the left menu  
- Click My Carts and Orders  
- Click on View Carts |
| 2.   | Click on the Draft Carts tab,  
- Find the returned requisition  
  o Click on the requisition (hyperlink) under the ‘Shopping Cart Name’ column |
3. Click on the **Comments** tab and read the comments
   - This explains why the requisition was returned.

Note: you can also click on the **History** tab to find more information about why your requisition was returned.

4. Complete any required changes and once done,
   - Select **Submit Requisition** or
   - Click **Assign Cart** to resubmit your requisition to the original Requisitioner, if applicable.
     - Search for and select the appropriate Requisitioner
     - Click **Assign**
H - Working with Carts Sent to You for Review (Assigned Carts)

Introduction

The term Requisitioner is used to describe someone that is responsible for reviewing a shopping cart and attaching a speedcode and account to it, as well as providing the first level of approval for the order. The Requisitioner creates the purchase requisition that goes to the Approver and on to become the purchase order that is sent to the vendor for fulfillment.

Actions associated with assigned carts

The following actions can be taken by a Requisitioner for a shopping cart assigned (sent) to them:

- The entire cart can be submitted for approval.
- One or more line items in the cart can be rejected.
  - If part of a cart is rejected (one or more line items), the remaining line items continue in the process.
- Comments and attachments can be sent “back and forth” between Requisitioners and Shoppers during the review process.

If a line item or the entire requisition is rejected, the rejection notice will show up in the History tab. If the user is set up to receive email notifications for rejections, they will also receive an email that contains the rejection reason.

View draft carts assigned to you

Once the Shopper’s cart is assigned to a Requisitioner, the Requisitioner it is assigned to sees a notification indicator and an action indicator in Mustang Market, and receives an email letting them know that a cart was assigned to them, if email notifications are turned on in their profile settings.

To review draft carts assigned to you follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click the **Action Items** from the Banner area  
      • Select **Carts Assigned to Me**  
      ![Action Items Image](image1)
|      |        |
| 2.   | Click on a **“Shopping Cart Name”** on the ‘Assigned Carts’ tab  
      • Review the **items** in the cart  
      ![Shopping Cart Name](image2)  
      **2014-04-10 shopper10 01** |
| 3.   | Click **Proceed to Checkout**  
      ![Proceed to Checkout Button](image3) |
| 4.   | From the ‘Requisition’, **Summary** tab,  
      • Review / Edit the information as needed, including:  
      - **General** info |
To remove an item from a shopping cart that has been assigned to you, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click **Action Items** from the Banner area  
      • Select **Carts Assigned to Me** |
| 2.   | Click on a `Shopping Cart Name` on the ‘Assigned Carts’ tab  
      • Review the items in the cart |
| 3.   | Click check box to the right of the line item to be removed |
| 4.   | Click the action menu `(# item selected)` drop down arrow  
      • Select **Remove Selected Items** |
| 5.   | Click **Proceed to Checkout** |
| 6.   | Finish reviewing the requisition and then  
      • See the section ‘**View draft carts assigned to you**’ for details |
Tax exceptions and exemptions can only be made on a requisition by Procurement. To indicate that a tax exception is applicable, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1. | On the Requisition Summary screen, select the edit button in the Procurement Request section. Scroll down to the Procurement Request section.  
    |      |
| 2. | Check off the “Send for Tax Review” checkbox. Click Save.  
    |      |
| 3. | Add an Internal Note to explain the tax exception. External Note: not applicable.  
    |      |
| 3. | To indicate the tax exception reason, scroll down to the item you are purchasing. Click Edit to the right of the item. Select a Reason from the drop down menu. Click save.  
    |      |
You may need to return a cart to the original Shopper to have him/her make a change, for example to change a line item or a speedcode.

To return a shopping cart, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Click **Action Items** from the Banner area  
      • Select **Carts Assigned to Me** |
|      | ![Action Items](image)  
| 2.   | Click on **Shopping Cart Name** from the **Assigned Carts** tab  
      • **Review** the items in the cart |
|      | ![Shopping Cart Name](image)  
| 3.   | Click **Return Cart** from the top of the screen  
|      | ![Return Cart](image)  
| 4.   | Enter **Notes** to explain the reason for the cart return  
|      | • **Click** Return button  
      | ![Return Cart](image)
How to withdraw a requisition

You can withdraw your requisition as long as it is still in pending status, i.e. it has not become a purchase order.

To withdraw a requisition, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Hover over the **Order** icon from the Navigation bar on the left  
      - Click **Search**  
      - Click **Requisitions** |
| 2.   | Click the **Requisition Number** |
| 3.   | Click **Withdraw Entire Requisition** from the top right of the requisition |
| 4.   | Enter the **Comment** indicating the reason for the withdraw  
      - Click **OK** |

Once a requisition is withdrawn, it cannot be reinstated. Click **OK** to withdraw, or **CANCEL** to leave the requisition unchanged.

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the **History** tab of the document.
## I – Finding an Order, Requisition or Invoice

### Introduction
Workflow describes the steps a document goes through in Mustang Market from the creation of a draft cart to the submission of the order to the vendor. It is helpful to know the workflow so you can see where your order or invoice is in workflow. This lets you know who to follow up with when needed.

### Typical workflow of an order

Even a typical workflow can vary depending upon a number of things, such as the setup requested by the department / faculty, the spending limit of the Requisitioner or Approver, and the type of purchase being made. i.e. office supplies versus chemical products or for a CFI project.

Generally speaking, a draft cart is submitted and goes through the process outlined in the graphic below.

![Workflow Diagram](image)

The stages of workflow may include:
- **Initial Validation** – this is a system check that ensures the account selected to pay for the purchase has budget for the current fiscal year
- **Department or Researcher Approvals** – all orders placed by Shoppers or Requisitioners require review and or approval and are directed to the appropriate department or research approver based on the speedcode used for the purchase
- **Procurement** – orders are automatically routed to Procurement for a number of reasons including purchase of biohazardous materials, consulting, new vendor, and when ‘Send for review’ is selected prior to the requisition being submitted.
- **Research Finance** – purchases made on research account that may require additional research finance review
- **Final Validation** – this is another system check that confirms there is budget for the current fiscal year

Once the order passes the Final Validation workflow, a Purchase Order is automatically created and sent to the vendor to fulfill.
Finding the status of the requisition

To look up the status of your requisition and see who needs to approve it, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To find the related requisition: Hover over the Orders icon on the Navigation Bar on the left  
     • And either:  
       o Click in the Quick search field  
       ▪ Enter the requisition number if known,  
       OR  
       • Click Requisitions to see a list of Requisitions submitted by you |
|      | ![Image](image1.png) |
| 2.   | Click the applicable Requisition Number |
|      | ![Image](image2.png) |
| 3.   | In the requisition document, go to the workflow section on the right side of the requisition. On this screen you can see:  
     • Completed, active, and future workflow steps  
     • Approvers – click on the active step, “Department Approvals”  
       o Tip: Use the Comments tab to send an email to the Approver |
|      | ![Image](image3.png) |
Finding the payment status of the invoice

Once an invoice has been processed by Accounts Payable, a Voucher document will be available in Mustang Market. Note: For additional invoice inquiries, please contact accountspayable@uwo.ca.

To look up the invoice and payment details, follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Hover over the Orders icon on the Navigation Bar on the left
      | And either:
      | o Click in the Quick search field
      |     • Enter a document number if known,
      |     OR
      | o Click Purchase Orders |
| 2.   | Click the Purchase Order Number |
| 3.   | Click the Vouchers tab.
      | To see any vouchers/invoices processed against the PO. On this screen you can see:
      | • Voucher number
      | • Due Date
      | • Payment Status (processed or paid)
      | To view more information, click on the voucher number.
Finding a requisition, purchase order, or invoice

Using Orders you can search for: all documents, one type of document and / or provide a date range to search by. This is a useful search tool when you don’t have a specific document number to search by or are reviewing multiple documents.

To conduct a simple document search follow the instructions in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Hover over the Orders icon on the Navigation Bar on the left  
      | And either:  
      | o Click in the Quick search field  
      | ▪ Enter a document number if known,  
      | OR  
      | o Click All Orders or a specific document type to look up multiple documents or if the number is unknown |
|      | ![Orders Icon](image) | ![Quick search](image) | ![All Orders](image) |
| 2.   | To look up specific document types, once you are on the All Orders screen,  
      | ▪ Click the Type of Order drop down and  
      | ▪ Select one or more of the filters  
      | ▪ Click Apply |
|      | ![Type of Order](image) |
| 3.   | Click ‘Date Created: All’ drop down arrow  
      | ▪ Enter / select a date range  
      | ▪ Click Apply |
|      | ![Date Created](image) |
4. Click **Add Filter** to further narrow down your search
   - Select a filter
     - Enter the applicable filter information in the pop-up box that appears
     - Click **Apply**

5. Click on the **Document Number** for the document you want to view
   - For example: P#### for purchase order
   - R### for requisition
   - V##### for voucher

To resend the Purchase Order to a vendor, follow the steps in the table below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | Hover over the Orders icon on the Navigation Bar on the left  
      - And either:  
        - Click in the **Quick search field**  
          - Enter a document number if known,  
        OR  
        - Click **Purchase Orders** |
| 2.   | Click the **Purchase Order Number** |
From the Purchase Order tab:
- Click the **actions** menu on the top right of the screen
- Select **Print Fax Version**
  - This will bring up the official PO document in a new window.
  - From here, you can print or save the PO and then email it to the vendor.