Gateway Phoenix Interface

1) Go to the Gateway login page - https://gateway.procurement.ucsb.edu
2) On the right hand side of the screen, login with your UCSBNetID and password.
3) From the main Homepage, there are several ways to shop:

a. You can use the Search Box function to shop across all Showcase Vendors (each order can only contain items from one vendor at a time).
   - This will search across all available suppliers; you can review the individual options and price check across multiple companies.

b. If you know the SKU numbers, you can use the Quick Order function (linked below the Search Box shown above). All items need to be from the same vendor.
c. For Medical/Clinical/Lab Supplies you can search directly from their icon on the homepage:

d. Showcase Suppliers are vendors that have their catalogs hosted on the Gateway site.
   - There are currently 12 vendors that are in this category.
   - Punch-Out Suppliers are vendors that have granted access to their catalogs through the Gateway portal.

- Clicking on the vendor’s icon from the homepage, the system will transfer you to the UCSB version of their website.
- When you “punch-out” to a linked vendor, their site will show UCSB pricing.
- You will know you are still working within Gateway if the large white banner is across the top.

- After you have added the products you need to the Punch-Out shopping cart, click on the Cart in the upper right-hand corner to view your items.

- After reviewing your order, click on the Green button that says “Return Cart to Purchasing Application” to send the items to Gateway.
You can get back to Gateway without adding anything to your cart by clicking on the blue Cancel Punch Out button on the top right-hand side of the screen.

e. Non-Catalog Items are for vendors that do not currently have a relationship with Gateway.
   
   You can find the link to the non-catalog item option under the Shop/Search box:

- Go to: advanced search | favorites | forms | non-catalog item

   You can select a vendor from the Purchasing system and manually enter a product or quote for purchase through the Gateway portal. Click “Save and Close” if you have finished adding your items.

- Go to Cart (it will be in the upper right-hand corner of your screen). Click on the icon and select "View My Cart" from the menu box. It should take you to your Shopping Cart.

- You can upload quotes from vendors directly into the system on the right hand side of the screen, above the line items.

- If you have paperwork to attach to the order, send it to ERI Purchasing to upload when they approve the order.

f. Walk-In PO forms are available for local vendors (such as Aqua-Flo, UCen Bookstore, Channel City Lumber, etc.) that will accept POs for items that you cannot order online or need immediately. On the main homepage, the icon is underneath the Showcased Suppliers.

   Fill in the appropriate sections and click the Go button at the top of the form to add the items to your cart.
CHECKING OUT

1. Once you have all of your items from one vendor in your cart and are ready to checkout, click on the Cart icon in the upper right corner.

2. Once you have the Cart open, you can rename it from the default of the date and your UCSBNetID to something more descriptive (in case you need to quickly search your Order History) or would like to save the Cart contents for duplicate future orders.

   At this point, you can either select Finalize Cart to input the accounting and shipping information or Assign Cart to send the cart to another person to add items and/or fill in the account information for you.

   a. Assuming you have already set up a Favorite Address and marked it as a default, the only Alert you should see is the select the appropriate Accounting Codes alert.
b. Clicking on either of the yellow boxed “Required Field” texts will open the Account Code pop-up.

c. To find your department, click on “Select from all values…” (Note: Even if you know your department code, entering it directly into the box will not do anything. If you've saved your department as the default Favorite earlier, this step can be skipped) A search filter should appear.

d. If you do know your department code, now is where you can enter it. Hit Search and it should appear. If you do not know your department code, do not enter anything and hit Search. This will give you the entire list of departments on campus that you can search from.
e. Select your department. You should end up returning to the Account Code popup. Once the department is correctly selected, you now should be able to search for the right Account String. Click on "Select from all values" under the Account String search box. This should pull up another popup or give you a drop-down menu for all the accounts under that department.

f. Once you select the appropriate account, you can either select the Sub Account or let the Department Buyer do that when they review the order.

g. Select Save when you are finished.

h. If needed, you can click on the Final Review link in the yellow box.

i. Double check all of the information entered and select the Submit Requisition button if there are no changes.

Once the requisition clears the department approvals, it is automatically pushed through the Purchasing system and non-standard orders will be flagged and routed accordingly.

ORDER TRACKING

Use the Document Search tab along the top of the homepage.

You can select the type of document you want to Search (All Documents; Requisitions; Purchase Order; Invoice; Receipt) at the top of the page.

a. Limiting the Search to your department: Click on Advanced Search and scroll to the bottom of the page. Enter your department under the Custom Field section.