1) Getting Started
ACCESS eSHOP
- Log in to Firefly (http://firefly.nebraska.edu)
- Click the eSHOP tab
- Click the GO button to launch eSHOP outside of Firefly

2) Setting Up Your Profile
ADD VALUES TO YOUR PROFILE AND SET DEFAULTS
- Click the My Profile link on the navigation bar or the profile link next to your name at the top of the page
- Click the Purchasing tab
- Designate values for your profile and set the following defaults:
  - Unloading Point (Custom Fields > Header tab)
  - Cost Objects (Custom Fields > Codes tab)
  - Shipping and Bill To Addresses (Addresses tab)
  - Cart Assignees (Cart Assignees tab)
- Review the Training Snippet on Updating Your Profile for more information

3) Shopping — Creating a Cart
HOSTED SUPPLIER CATALOGS
- From home/shop page
- Using the Shop bar at the top, enter search term, then click Go
- For more search options click on the Advanced Search
- Change the quantity (if necessary) and click the Add to Cart button beside the desired item
- Follow Submitting an Active Cart instructions below OR

PUNCH-OUT CATALOGS
- From home/shop page
- In the Punch-out area, click the supplier’s icon to open supplier’s punch-out site
- Search in supplier’s site for items and add to supplier’s shopping cart
- Follow supplier’s site instructions for returning the item(s) to your active cart in eSHOP
- Follow Submitting an Active Cart instructions below OR

NON-CATALOG ORDER FORM
- From home/shop page
- In the Showcased Services section click on the Non-Catalog Order form
- Read the form’s General Information and complete form
- Select Add and Go to Cart to enter one item
- Select Add to Cart to continue adding items using the same form
- Click Go
- Follow Submitting an Active Cart instructions below

4) Modifying an Active Cart
REMOVE ITEMS FROM CART
- Open Active Cart
- Click check box to the right of the price
- Select Remove Selected Items from For selected line items drop down menu

CHANGE PRODUCT QUANTITY
- For Hosted Catalog items already added to cart
  - Modify number in Quantity field
- For Punch-out Catalog items
  - If possible, click MODIFY ITEMS to be returned to the punch-out supplier’s site. Modify quantity and follow supplier’s directions to checkout and return to eSHOP
  - If there is no MODIFY ITEMS link, you will need to delete the item from the cart and add the item to the cart again from the punch-out vendor’s site

5) Adding Funding Information to an Active Cart
ASSIGN ACCOUNTING CODES
- Click Proceed to Checkout
- Click Accounting Codes tab at the top
- Click Edit at the top to assign funding information to all lines OR
- Click Edit at the line to assign funding information to a line
- Click Select profile values to choose pre-defined values or Select from all values to search for a value
- Click Recalculate and Save

SPLIT ACCOUNTING CODES
- Click on Accounting Codes tab
- Click Edit at the top to split fund the entire Requisition OR
- Click Edit at the line to split fund a specific line (this will override the Header values)
- Click Add split
- Select % of Price, % of Qty or Amount of Price
- Click Select profile values to choose pre-defined values or Select from all values to search for a value
- Enter correct % or amount beneath the price/quantity drop down menu for each Cost Object
- Click Recalculate and Save

ADD INTERNAL NOTES AND/OR ATTACHMENTS (TO PURCHASING)
- Click Proceed to Checkout
- In the Internal Notes and Attachments area, click Edit button
- Add a note
- Click Save
- Click add attachment
- Browse to find attachment
- Choose attachment
- Click Save

ADD EXTERNAL NOTES AND/OR ATTACHMENTS (TO SUPPLIERS)
- Click Proceed to Checkout
- In the External Notes and Attachments area, click Edit button
- Add a note
- Click Save
- Click add attachment
- Browse to find attachment
- Choose attachment
- Click Save

6) Assigning an Active Cart (Shopper)
- Once items have been added to cart
- Click Assign Cart
- Leave the default assignee you previously designated
- Click Select from profile values or Search for an assignee
- (Optional) Enter a note to the Assignee
- Click Assign
7) Submitting an Active Cart (Requestor)
- Review/modify cart contents and required information (Accounting Codes, Shipping information, etc.)
- Click Submit Requisition

8) Tracking a Requisition
**FIND A REQUISITION**
- Click the document search tab
- Click the my requisitions link
- Use the filters on the left to change date range or narrow the results
- Click the Requisition Number link
- View the summary, detail, approval status or history and add notes or comments if needed

9) Withdrawing a Pending Requisition
**WITHDRAW ENTIRE REQUISITION**
- From home/shop page, click Pending under My Orders>Requisitions in the Action items area
- Click the Requisition Number link
- In Available Actions drop-down menu, select Withdraw Entire Requisition
- Click Go
- In message box type your reason
- Click Withdraw Entire Requisition

**WITHDRAW A LINE**
- From home/shop page, click Pending under My Orders>Requisitions in the Action items area
- Click the Requisition Number link
- Check the appropriate checkbox to the right of the price
- In For selected line items drop-down menu, select Withdraw Selected Items
- Click Go
- In message box type your reason
- Click Withdraw Line Items

10) Creating a Goods Receipt
**CREATING A QUANTITY RECEIPT**
- Click the document search tab
- Choose Purchase Orders from drop-down Search menu
- Enter the PO number and click Go
- From Available Actions drop-down menu, choose Create Qty Receipt and click Go
- Review all line level data for quantity and cost accuracy
- Select Complete

**CREATING A PARTIAL RECEIPT**
- Click the document search tab
- Choose Purchase Orders from drop-down Search menu
- Enter the PO number and click Go
- From Available Actions drop-down menu, choose Create Qty Receipt and click Go
- Review and modify pre-populated quantity or amount
- If line item has not been received, click Remove Line
- Review all line level data for quantity and cost accuracy
- Select Complete

**CREATING A RECEIPT WITH RETURN/CANCELLED**
- Click the document search tab
- Choose Purchase Orders from drop-down Search menu
- Enter the PO number and click Go

- From Available Actions drop-down menu, choose Create Qty Receipt and click Go
- For one of the lines that was previously received, enter a quantity and change Line Status to Returned or Cancelled
- Select Complete

11) Modifying a Purchase Order
**CANCEL A PO OR PO LINE**
- From home/shop tab, click Change Order Request form
- Read form’s General Information
- Enter required fields
- Choose Cancel Purchase Order from Explanation of Change(s) Requested area
- Add Explanation of Change
- Select Add and go to Cart
- Click Go
- See instructions for Submitting an Active Cart

**INCREASE QUANTITY OR PRICE ON PO**
- Follow instructions above for cancelling a PO and create a new PO to increase the total purchased value

12) Approve/Reject a Pending Requisition
**APPROVE via EMAIL**
- Open Approval Email
- Review Requisition details
- Click Take Action
- Select an Action
- Click Submit

**APPROVE IN eSHOP**
- From home/shop page under Action Items, click Approvals and then Requisitions under Unassigned Approvals or My Assigned Approvals if you have previously assigned it to yourself
- Click the Requisition Number link
- Review the items, ship-to address, Cost Objects, notes, etc
- Select Approve/Complete Step in the Available Actions drop-down menu
- Click Go

**RETURN A REQUISITION**
- From home/shop page under Action Items, click Approvals and then Requisitions under Unassigned Approvals
- Click on the Requisition Number link
- From Available Actions select Assign to Myself and click Go
- From Available Actions select Return to Requisitioner and click Go

**REJECT A REQUISITION**
- From home/shop page under Action Items, click Approvals and then Requisitions under Unassigned Approvals
- Click on the Requisition Number link
- From Available Actions select Assign to Myself and click Go
- From Available Actions select Reject Requisition and click Go

**REJECT A LINE**
- From home/shop page under Action Items, click Approvals and then Requisitions under Unassigned Approvals
- Click on the Requisition Number link
- From Available Actions select Assign to Myself and click Go
- Click the box beside the price for the item
- From For selected line items choose Reject Selected Items and click Go