HOW TO PLACE AN ORDER IN GATEWAY

1) Log in to Gateway at - [https://gateway.procurement.ucsb.edu](https://gateway.procurement.ucsb.edu)

2) On the right hand side of the screen, login with your UCSBNetID and password.

3) From the homepage, there are several ways to shop:

   a. You can use the **Search Box** function to shop across all catalog suppliers/vendors (each order can only contain items from one vendor at a time).
      - You will be able review individual options and price check across multiple vendors.

   b. If you know the SKU numbers for catalog vendors, you can use the **Quick Order** function located below the search bar. All items need to be from the same vendor.

   c. **Showcase Suppliers** are vendors that have their catalogs hosted on the Gateway site or have granted access to their catalogs through the Gateway portal. Purchasing expects to add more vendors in the future.
• You can search directly from their icon on the homepage:

![Spectrum UNIVERSITY CENTER]

• Or, by clicking on the vendor’s icon from the homepage, the system will transfer you to the UCSB version of the vendor’s website through the Gateway portal if they are a Punch-out Supplier.

![Fisher Scientific]

• 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 navy banner is across the top.

![Gateway Punchout]

• 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.

![Welcome Naomi Recanat Fischer PunchOut Partner]

• After reviewing your order, click on the green button that says "Return Cart to Purchasing Application," then “Submit” (on the following page) to send the items to Gateway to complete and finalize your order.

![Order Cart to Purchasing Application]
• You can get back to Gateway without adding anything to your cart by clicking on the orange "Cancel Punch-out" button in the top right corner of the screen.

e. **Non-Catalog Items** are for vendors that do not currently have their catalogs linked to Gateway.
   • You can find the link to start an order for a **non-catalog item** under the **Shop/Search** box:

   ![Gateway Shop/Search](image1)

   • You can select a vendor from the vendor database and manually enter the order details in the non-catalog window (e.g., copy and pasting the product information from the vendor’s website).

   ![Non-Catalog Item](image2)

f. **Walk-In PO forms** are available for local vendors (such as Home Depot, K-Mart, Tri-Valley Trophies, etc.) that will accept POs for items that you cannot order online or need immediately. From the main homepage, the form can be found in the **Gateway Forms** section on the homepage.

![Gateway Forms](image3)

• Fill in the appropriate fields in the pop-up window and click the **Go** button at the top of the form to add the items to your cart.

![Walk In PO](image4)
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, we ask that you add your project code after your name to help us distinguish which Department Buyer is responsible for approving the order.

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

- If you have paperwork to attach to the order, after you “finalize the cart,” you can upload it to the “Notes and Attachments” section on the Requisition tab.
  - You may also leave a note for the vendor (External Note) in this section (e.g., the name of the representative who gave you the quote, a reference number, etc).

3) 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 or for them to assist with any questions or problems.
a. Assuming you have already set up a **Favorite Address** and marked it as the default, the only **Alert** you should see is to select the appropriate **Accounting Codes**.

b. Clicking “**Required Field**” in either of the yellow boxes will open the **Account Code** pop-up window.

c. To enter the department name, click on “**Select from all values...**” and type **MTRL** in the value field of the Custom Field Search window and click “**Search**”.
   i. Once the “Materials Research Laboratory” description populates, click “**Select**”.
   ii. You will then be prompted to enter the **Account String** information.

d. If **Code Favorites** are already set up, you can use the dropdown menu to select the appropriate project code.

e. If you have not set up **Code Favorites**, once the department (MTRL) has been selected, click on “**Select from all values...**” to view the list of accounts.

f. Once you select the appropriate account, select the **Sub Account**. If you are unsure of what sub to select, the Department Buyer can select it when they review the order.

g. Select “**Save**” when you are finished.

h. Double-check all of the information entered and select the “**Submit Requisition**” button if there are no changes.
i. This will route your order through the appropriate channels for approval.

4) Below is an example of the approval process workflow for a low value PO.
   a. The person placing the order is the Requester (far left).
   b. If you have purchase authorization, the Account Approval step will automatically approve if the order is within your authorized limit.
   c. If you do not have purchase authorization, your PI will provide the Account Approval.
   d. Next, it will go to your MRL Department Buyer (Sylvia, Naomi, and Janet) for final review and approval (Department Post-Approval).
      i. If the order includes equipment or restricted items, it will then be routed to Purchasing and EH&S, respectively, for approval.
   e. Once the order has cleared all necessary approvals, Gateway will issue a PO number and the order will be automatically submitted to the vendor through Gateway. You will receive order updates by e-mail through Gateway.