How to Create a Dell Punchout in PeopleSoft

A Quick Reference Guide for Dell Punchout
Procurement
February 2016
Table of Contents

What are the Advantages of using Dell Punchout

How to Create a Dell Punchout in PeopleSoft
- Creating an eQuote
- Creating a Punchout using a saved eQuote
- Creating a Punchout by adding to the shopping cart

How to Use the Link in the Dell Email

How to Edit a Dell Punchout Requisition

Where to find this Quick Reference Guide

Page 2
Pages 3-10
Pages 11-16
Pages 17-22
Pages 23-25
Page 26
Page 27
What are the Advantages of using Dell Punchout

- The user is able to perform their tasks in a more timely and efficient manner.

- The “punch-out” process will allow users to punch-out to the website Dell provided to the university and shop for items at a discounted rate.

- After a user adds items to the cart on the Dell website, the information will be automatically transferred back into PeopleSoft eProcurement in the form of a requisition for review, budget checking and submission for approval.

- This gives your procurement department more in-depth information regarding price adjustment history, the source of those price adjustments, and the ability to more easily report on contract related price adjustments.
How to Create a Dell Punchout in PeopleSoft

As the requisitioner you can shop on the Dell website, create an eQuote, and/or access an eQuote created by someone in your department.

- Navigation Path: Main Menu→eProcurement→Requisition

Begin by using the **Requisition Settings** page to enter information that apply to the entire requisition. Be sure to add your accounting information at the bottom of the page.

1. Click the **OK** button.
Now let’s punchout to Dell’s Premier website:

2. On the Create Requisition page, click the **Dell Punchout** link in the Web section of the page.
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As you can see, the link brought you directly to USC’s Dell Premier website.

- When punching out, a second window will open and this message appears. It is important to keep this window open to ensure that you are brought back into PeopleSoft when you click the **Submit a Requisition** button in the Dell website.

- If a sign-in page appears, you will need to update your web browser. Doing this will take you directly into USC’s Dell Premier page where a sign-in will not be required. (Steps for updating your web browser can be found on the Resource page of the PeopleSoft website in the eProcurement section.)
How to Create a Dell Punchout in PeopleSoft

To create an eQuote:

3. Select the items you want to purchase.

4. Click the **Add Selected To Cart** button.
5. Review your cart contents, then click the **Save as eQuote** button. This will allow you to use the eQuote at another time.
6. Complete the **eQuote Details** page.

7. Click the **Continue** button.
8. Complete the **Contact Information**. (Note: Use the Additional Email Recipient(s) field to send to others.)

9. Click the **Save eQuote** button.
Now your eQuote is ready to use another time.

- When you save the eQuote you will receive the following message. The eQuote will expire after 60 days.

Thank you. Your eQuote has been saved!

This eQuote expires on 4/2/2016

- Use the dropdown arrows to review the eQuote Details, Contact Information, and Cart Contents.
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To create a Punchout using a saved eQuote: (Begin with steps 1 and 2 on slides 3-4)

- Be sure to use one eQuote per request.

3. Click the Quotes link.

4. You can enter any of the suggested search criteria to find a saved eQuote. For this example, enter the Saved By information.

5. Click the Find Quote button.
6. Click the link for the **eQuote** you want to purchase.

Results

<table>
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<tr>
<th>eQuote Number</th>
<th>Name</th>
<th>Saved By</th>
<th>Saved On</th>
<th>Expires On</th>
<th>*Estimated SubTotal</th>
<th>*Estimated Total Price</th>
<th>Order Submitted</th>
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<td>2/2/2016</td>
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<td><a href="mailto:JOANNEC@mailbox.sc.edu">JOANNEC@mailbox.sc.edu</a></td>
<td>2/2/2016</td>
<td>4/2/2016</td>
<td>$1,147.16</td>
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<td>1021775971984</td>
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<td>1022903867508</td>
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<td>2/2/2016</td>
<td>4/2/2016</td>
<td>$2,267.52</td>
<td></td>
<td>- No</td>
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</tbody>
</table>
How to Create a Dell Punchout in PeopleSoft

7. Review/edit the eQuote information, then click the Create Order Requisition button.
8. Then click the **Submit Order Requisition** button in the Order Summary box.
Now you are back in PeopleSoft.

- Clicking the **Submit Order Requisition** button takes you back into PeopleSoft.
- Use the **Checkout – Review and Submit** page to complete your purchase.
How to Create a Dell Punchout in PeopleSoft

- The **Globe** icon indicates the line was created in the Dell Premier website.

9. Click the **Check Budget** link.

10. Click the **Save & Submit** button, to create a Requisition ID.
How to Create a Dell Punchout in PeopleSoft

To create a Punchout using the shopping cart in Dell: (Begin with steps 1 and 2 on slides 3-4)

3. Select the items you would like to purchase.

4. Click the **Add Selection To Cart** button.
5. Review/edit the order, then click the **Create Order Requisition** button.
How to Create a Dell Punchout in PeopleSoft

6. The **No charge delivery** option is already selected for you. If you would to choose another option you may do so here.

7. Select the **No, I will not be exporting** option. If you do not select an option here, a popup window will prompt you to do so.

8. Click the **Continue** button.
How to Create a Dell Punchout in PeopleSoft

8. Then click the **Submit Order Requisition** button in the Order Summary box.
How to Create a Dell Punchout in PeopleSoft

Now you are back in PeopleSoft.

- Use the **Checkout – Review and Submit** page to complete your purchase.

![Checkout - Review and Submit](image-url)
How to Create a Dell Punchout in PeopleSoft

- The **Globe** icon indicates the line was brought in from the Dell Premier website.

10. Click the **Check Budget** link.

11. Click the **Save & Submit** button, to create a Requisition ID.
How to Use the Link in the Dell Email

When creating an eQuote in Dell, you may choose to complete Order Contact information. If you do, you can use the Additional Email Recipient(s) field to send eQuote information to others.

- You can add as many emails as you like. Be sure to add a comma after each email.
- Recipients will receive an email.
How to Use the Link in the Dell Email

The email includes a link that will bring you back into the Dell Premier website.

- **NOTE:** All Dell orders are to be created using Dell Punchout in PeopleSoft. To ensure you are doing so, you **MUST** have PeopleSoft open, and punched out to Dell, when you click the Premier link.

- You punchout to USC’s Dell Premier website by clicking the **Dell Punchout** link on the Create a Requisition page.
How to Use the Link in the Dell Email

In addition, the email includes information you can use to search for an eQuote in the Dell Premier website.

- Use the eQuote number
- The eQuote Name
- Or, the Saved By email address

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You have saved an eQuote **1024192935160**

An eQuote is now saved in your Dell Online Store. This will be held for 60 days and will expire on 04/03/2016

Your eQuote has been sent to:
Emailed to: ANDREADG@mailbox.sdc.edu
LLW@sc.edu
JOANNEC@mailbox.sc.edu

To retrieve this eQuote
Login to Premier
Sign in to University of South Carolina NASPO ValuePoint 4400011358 / WN29AGW
Click on “Quotes” in the top menu bar and search for eQuote number 1024192935160

<table>
<thead>
<tr>
<th>eQuote Name</th>
<th>eQuote Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dell Order</td>
<td>A mouse needed for a new laptop</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Saved By</th>
<th>Notes/Comments</th>
</tr>
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<tbody>
<tr>
<td><a href="mailto:JOANNEC@mailbox.sc.edu">JOANNEC@mailbox.sc.edu</a></td>
<td>Please select next day delivery as Shipping Option</td>
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</table>
How to Edit a Dell Punchout Requisition

- **Editing the eQuote**: You can edit an eQuote in the Dell Premier website by removing items, and/or changing the quantity of the item. The eQuote can not be updated by adding a different item. The expiration date is updated to match the changes.

- **Editing the Shopping Cart**: Before clicking the Submit Order Requisition button in the Dell Premier website, you can edit your order by removing, and/or adding items to the shopping cart.

- **Editing in PeopleSoft**: After clicking the Submit Order Requisition button, you are taken back into PeopleSoft. Once in PeopleSoft, edits should not be made to your requisition, as this will not match the information from Dell. If you need to make changes, on the Checkout – Review and Submit page, click out of PeopleSoft, and when prompted to Save changes, click the No button. This will require you to create the request again, making sure you do not encounter delays with the order and payment.
Where to find this Quick Reference Guide

<table>
<thead>
<tr>
<th>General UPK Information</th>
<th>General PeopleSoft Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• How to Use the UPK Player »</td>
<td>• USC PeopleSoft Glossary »</td>
</tr>
<tr>
<td></td>
<td>• Request for PeopleSoft Finance Access »</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PeopleSoft Chart of Accounts</th>
<th>PeopleSoft Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>• PeopleSoft Chart of Accounts »</td>
<td>• ePre Requisition Approval Workflow »</td>
</tr>
<tr>
<td>• New Code Structure »</td>
<td>• Workflow Tip 1 »</td>
</tr>
<tr>
<td>• A Quick Reference Guide to Categories »</td>
<td>• Workflow Tip 2 »</td>
</tr>
<tr>
<td></td>
<td>• Department Approvers »</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Request Information</th>
<th>eProcurement Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Payment Request Matrix »</td>
<td>• Revised Quick Reference for Amount Only vs. Quantity »</td>
</tr>
<tr>
<td>• Payment Request Guidelines »</td>
<td>• Revised Quick Reference for Receiving In PeopleSoft »</td>
</tr>
<tr>
<td></td>
<td>• Quick Reference for a Change Order »</td>
</tr>
<tr>
<td></td>
<td>• Requisitioner Hands On Training PPT »</td>
</tr>
<tr>
<td></td>
<td>• Receiving in PeopleSoft Webinar Recording »</td>
</tr>
<tr>
<td></td>
<td>• Dell Punchout Webinar PPT »</td>
</tr>
<tr>
<td></td>
<td>• Chrome Web Browser Update »</td>
</tr>
<tr>
<td></td>
<td>• Internet Explorer Web Browser Update »</td>
</tr>
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<td>• Mozilla Firefox Web Browser Update »</td>
</tr>
</tbody>
</table>
Questions

- If you have any additional questions please email them to PSTRAIN@mailbox.sc.edu.
- This presentation is also available to download on our PeopleSoft Training website.
Thank You!