

USC



UNIVERSITY OF SOUTH CAROLINA



How to Create a Dell Punchout in PeopleSoft

**A Quick Reference Guide for Dell Punchout
Procurement
February 2016**

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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.

The screenshot shows the "Requisition Settings" page in PeopleSoft. The breadcrumb navigation at the top is "Favorites > Main Menu > eProcurement > Requisition", with "Main Menu", "eProcurement", and "Requisition" highlighted in a red box. The University of South Carolina logo is on the left, and navigation links like "Home", "Worklist", "MultiChannel Console", and "Add to Favorites" are on the right. The "Requisition Settings" section contains several fields: "Business Unit" (USC01), "Requester" (DORRELLK), and "Currency" (USD). To the right, there are fields for "Requisition Name" and "Priority" (Medium). At the bottom left, a red circle with the number "1" is next to the "OK" button, which is also highlighted with a red box. The "Cancel" button is next to it.

How to Create a Dell Punchout in PeopleSoft



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.

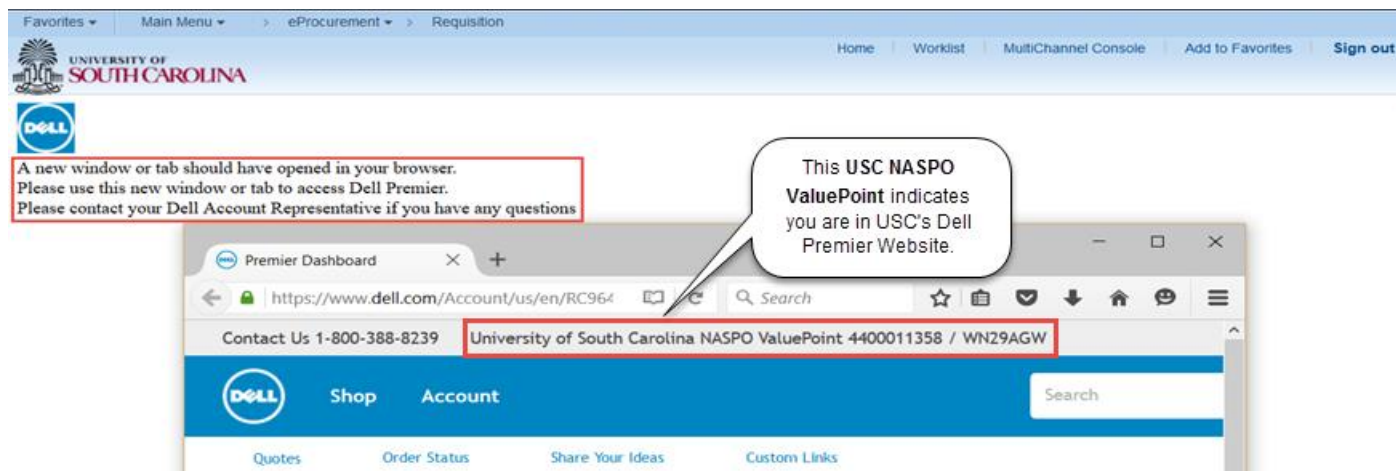
The screenshot shows the PeopleSoft eProcurement interface for the University of South Carolina. The breadcrumb trail at the top reads: Favorites > Main Menu > eProcurement > Requisition. The page title is "Create Requisition". The user is identified as "Welcome Kay Dorrell". The navigation bar includes links for Home, My Preferences, Requisition Settings, 0 Lines, and a Checkout button. Below the navigation bar is a search bar with "All" selected and a "Search" button. The main content area is divided into several sections: "Web" (Browse Supplier Websites) with a red circle and number "2" next to a red-bordered link for "TEST - Fisher Punchout Dell Punchout"; "Special Requests" (Create a non-catalog request); "Favorites" (Browse Favorite Items and Services); "Templates" (Browse Company and Personal Templates); "ePro Services" (Request Services, Fixed Cost Service, Variable Cost Service, Time and Materials); and "Recently Ordered" (View recently ordered items and services, including Graphic Art Services, SCCSS Vending Registration a..., Service Plan for equipment, Inv # 64498, Invoice # 0002415 - check co..., and More...).

How to Create a Dell Punchout in PeopleSoft



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.)



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To create an eQuote:

3. Select the items you want to purchase.
4. Click the **Add Selected To Cart** button.

Contact Us 1-800-388-8239 University of South Carolina NASPO ValuePoint 4400011358 / WN29AGW

Shop Account Search Search

Quotes Order Status Share Your Ideas Custom Links

Premier Dashboard

Premier Edit + Add a Tab

Standard Configurations Make this my default view | Close

Search

Filter All Categories

Add Selected To Cart 1 - 5 of 6 < 1 2 > 5 Items per page

<input type="checkbox"/>	Name	model ?	Category	Price
<input type="checkbox"/>	OptiPlex 7020 Mini Tower	OptiPlex (7020)	USC Standard Desktops	\$856.45
<input checked="" type="checkbox"/>	Latitude E6440	Latitude E6440	USC Standard Notebooks	\$1,120.36
<input checked="" type="checkbox"/>	Dell WM324 Wireless Mouse		Promotions	\$26.80
<input type="checkbox"/>	Logitech - Wireless Desktop MK520 Keyboard and Mouse		Promotions	\$55.79
<input type="checkbox"/>	Dell Printer Cartridges		Dell Printers	

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5. Review your cart contents, then click the **Save as eQuote** button. This will allow you to use the eQuote at another time.

Your Shopping Cart

Cart Contents (2 Items)

[Show all specs](#) | [Hide all specs](#) [View SKUs & Print](#)

Item	Quantity	Estimated Ship Date	Price
 Dell WM324 Wireless Mouse Update	1	Available to ship in 6 - 8 business days	\$0.00
Grouped with your Dell WM324 Wireless Mouse			
 Dell Wireless Bluetooth Mouse - WM524 Edit Remove	1	\$26.80	
 Latitude E6440 View more specifications	1	Available to ship in 4 - 6 business days	\$1,120.36

Cart Summary

Contract Code: WN29AGW

2 Items

Price does not reflect applicable shipping, taxes and state environmental fee.

Subtotal: \$1,147.16

[Create Order Requisition](#)

[Save as eQuote](#)

[Continue shopping >](#)


[Print](#)

How to Create a Dell Punchout in PeopleSoft




6. Complete the **eQuote Details** page.

7. Click the **Continue** button.

Save eQuote 

eQuote Details

 **Save your eQuote**
eQuotes can be used to save a quote for later, share with other users or send to an authorized buyer for review. For more information regarding eQuotes, please see the "eQuote Help" link.

***eQuote Name**
Dell Laptop Order

Description
New laptop for the Education Department

Notes / Comments
Please deliver as soon as it arrives

***Saved By**
JOANNEC@mailbox.sc.edu

Authorized Buyer
(Select a buyer to request purchase) ▾

eQuote Summary

Contract Code WN29AGW

3 Items [View Items >](#)


Price does not reflect applicable shipping, taxes and state environmental fee.

Price does not reflect applicable shipping, taxes and state environmental fee.

Subtotal **\$2,267.52**

Continue

[eQuote Help ?](#)



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

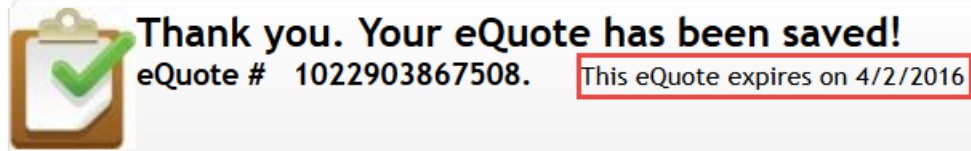
The screenshot displays the "Save eQuote" interface in PeopleSoft. It is divided into several sections. On the left, there is a table for "eQuote Details" with fields for Name, Contract Code, Description, Saved By, Premier Page, and Notes. Below this is a "Contact" section with a red box highlighting the "Order Contact" form, which includes fields for First Name, MI, Last Name, Company Name, Email Address, and Phone Number. On the right, there is an "eQuote Summary" section showing the Contract Code, a "3 Items" link, and a Subtotal of \$2,267.52. Below the summary is a "Save eQuote" button with a red notification bubble containing the number "9". At the bottom of the page, there are three "Norton SECURED" logos, each with a "Save eQuote" button and an "eQuote Help" link.

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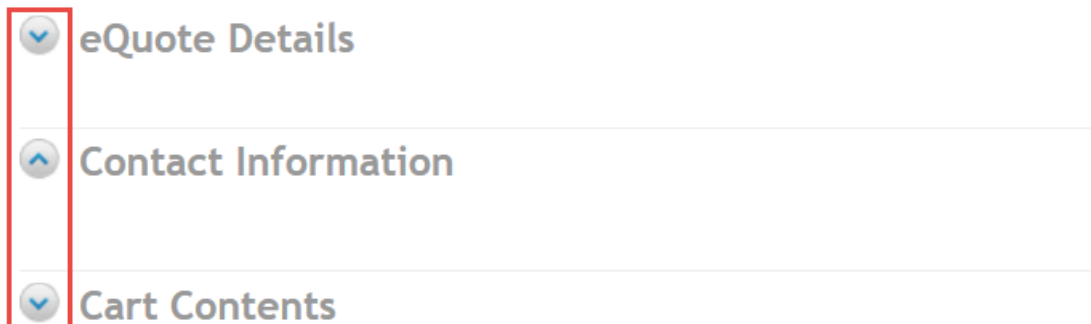


Now your eQuote is ready to use another time.

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



- 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.

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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.

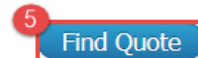
eQuotes

eQuotes are created directly in Premier by a user within your company or by a Dell Sales Agent

4 Search eQuote number, eQuote Name, Saved By or Nominated Buyer

ANNEC@mailbox.sc.edu

(eQuote Number - 13 digits e.g. : 1012357874561)



How to Create a Dell Punchout in PeopleSoft



6. Click the link for the **eQuote** you want to purchase.

Results

All Nominated Buyers All Saved By All Dates

Select an Action


Column Preferences
1 - 4 of 4 | 10 items per page

<input type="checkbox"/>	eQuote Number [^]	Name	Saved By [?]	Saved On	Expires On [?]	*Estimated SubTotal [?]	*Estimated Total Price [?]	Order Submitted
<input type="checkbox"/>	1011087761041	Callahan Test	JOANNEC@mailbox.sc.edu	2/2/2016	4/2/2016	\$1,147.16	-	No
<input type="checkbox"/>	1016378243286	Joanne's Test	JOANNEC@mailbox.sc.edu	2/2/2016	4/2/2016	\$1,147.16	-	No
<input type="checkbox"/>	1021775971984	USC Science	JOANNEC@mailbox.sc.edu	1/26/2016	3/26/2016	\$856.45	-	No
<input type="checkbox"/>	1022903867508	Dell Laptop Order	JOANNEC@mailbox.sc.edu	2/2/2016	4/2/2016	\$2,267.52	-	No

How to Create a Dell Punchout in PeopleSoft



7. Review/edit the eQuote information, then click the **Create Order Requisition** button.

Retrieved eQuote 

eQuote Details

eQuote Number	1022903867508
eQuote Name	Dell Laptop Order
Contract Code:	WN29AGW
Description	New laptop for the Education Department
Saved On	2/2/2016
Expires On	4/2/2016
Saved By	JOANNEC@mailbox.sc.edu
Premier Page	University of South Carolina NASPO ValuePoint 4400011358 / WN29AGW
Notes / Comments	Please deliver as soon as it arrives

eQuote Summary

Contract Code WN29AGW

3 Items



Price does not reflect applicable shipping, taxes and state environmental fee.

Subtotal **\$2,267.52**

Create Order Requisition

Save as new eQuote

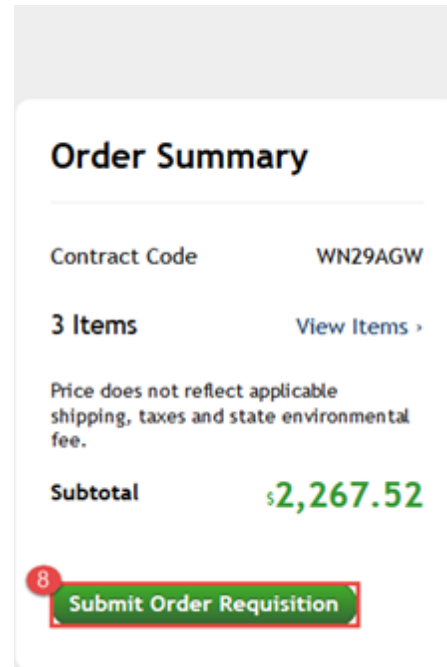
[Continue shopping >](#)

 [Email](#)  [Print](#)

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.

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

The screenshot shows the "Checkout - Review and Submit" page in the PeopleSoft eProcurement system. The page header includes the University of South Carolina logo and navigation links like "Home", "Worklist", and "MultiChannel Console". The main content area is titled "Checkout - Review and Submit" and includes a "Requisition Summary" section with fields for Business Unit (USC01), Requester (DORRELLK), and Currency (USD). Below this is a "Cart Summary" showing a total amount of 2,267.52 USD. The "Requisition Lines" table lists three items: Latitude E6440, Dell VM324 Wireless Mouse, and another Latitude E6440. The table has columns for Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, Details, and Comment. At the bottom, there are action buttons like "Add More Items", "Add to Favorites", and "Add to Template(s)".

University of South Carolina
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Checkout - Review and Submit
Review the item information and submit the req for approval.

My Preferences | Requisition Settings

Requisition Summary

Business Unit: USC01 University of South Carolina
*Requester: DORRELLK Kay Dorrell
*Currency: USD
Requisition Name: []
Priority: Medium

Cart Summary: Total Amount 2,267.52 USD
Expand lines to review shipping and accounting details
Add More Items










Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comment
1	Latitude E6440: E6440;Latitude		DELL MARKETING LP	1.0000	Each	1120.3600	1120.36		Add
2	Dell VM324 Wireless Mouse: Del		DELL MARKETING LP	1.0000	Each	26.8000	26.80		Add
3	Latitude E6440: E6440;Latitude		DELL MARKETING LP	1.0000	Each	1120.3600	1120.36		Add

Select All / Deselect All | Select lines to: | Add to Favorites | Add to Template(s) | Delete Selected | Mass Change

How to Create a Dell Punchout in PeopleSoft

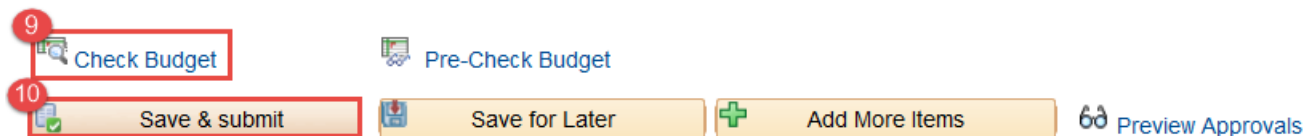


- The **Globe** icon indicates the line was created in the Dell Premier website.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comment
▶ <input type="checkbox"/> 1	 Latitude E6440: E6440, Latitude		DELL MARKETING LP	1.0000	Each	1120.3600	1120.36		 Add
▶ <input type="checkbox"/> 2	 Dell WM324 Wireless Mouse: Del		DELL MARKETING LP	1.0000	Each	26.8000	26.80		 Add
▶ <input type="checkbox"/> 3	 Latitude E6440: E6440, Latitude		DELL MARKETING LP	1.0000	Each	1120.3600	1120.36		 Add

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.

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DELL Shop Account Search Search

Quotes Order Status Custom Links

Premier Dashboard

Premier Edit Add a Tab

Standard Configurations Make this my default view Close

Search

Filter All Categories

1 - 5 of 6 < 1 2 > 5 Items per page

<input type="checkbox"/>	Name	model ?	Category	Price
<input type="checkbox"/>	OptiPlex 7020 Mini Tower	OptiPlex (7020)	USC Standard Desktops > Add to Cart > Customize	\$856.45
<input type="checkbox"/>	Latitude E6440	Latitude E6440	USC Standard Notebooks > Add to Cart > Customize	\$1,120.36
<input type="checkbox"/>	Dell WM324 Wireless Mouse		Promotions > Add to Cart > Customize	\$26.80
<input checked="" type="checkbox"/>	Logitech - Wireless Desktop MK520 Keyboard and Mouse		Promotions > Add to Cart > Customize	\$55.79

How to Create a Dell Punchout in PeopleSoft



5. Review/edit the order, then click the **Create Order Requisition** button.

The screenshot displays a shopping cart interface. The main area is titled "Cart Contents (1 Item)" and includes links for "Show all specs" and "Hide all specs". A table lists the items:

Item	Quantity	Estimated Ship Date	Price
Logitech - Wireless Desktop MK520 Keyboard and Mouse	1	Available to ship in 6 - 8 business days	\$0.00
Grouped with your Logitech - Wireless Desktop MK520 Keyboard and Mouse			
WIRELESS DESKTOP MK520 KEYBOARD AND MOUS	1		\$55.79
WIRELESS DESKTOP MK520 KEYBOARD AND MOUS			

Below the table, there are "Estimate Tax and Shipping" and "Subtotal \$55.79" sections. A note states: "Price does not reflect applicable shipping, taxes and state environmental fee." The right-hand panel, titled "Cart Summary", shows "Contract Code WN29AGW", "1 Item", and "Subtotal \$55.79". A red circle with the number "5" highlights the "Create Order Requisition" button, which is also highlighted with a green box. Other buttons include "Save as eQuote", "Continue shopping", and "Print".

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.

The screenshot shows the "Secure Checkout" page. On the left, under "Delivery options", there is a table with two columns: "Delivery method" and "Shipping cost". The "no charge delivery" option is selected, indicated by a red circle with the number 6. Below this, under "Trade compliance", there is a question: "* Will you be exporting the products you order today outside of the United States of America?". The "No, I will not be exporting" option is selected, indicated by a red circle with the number 7. On the right, under "Order Summary", the "Contract Code" is WN29AGW, and the "Subtotal" is \$55.79. A red circle with the number 8 is next to the "Continue" button.

Delivery method	Shipping cost
<input type="radio"/> 2nd business day delivery	\$14.99
<input checked="" type="radio"/> no charge delivery	\$0.00
<input type="radio"/> Next business day delivery	\$25.99

Trade compliance

* Will you be exporting the products you order today outside of the United States of America?

Yes, I intend to export

No, I will not be exporting

Order Summary

Contract Code: WN29AGW

1 Item [View Items >](#)

Price does not reflect applicable shipping, taxes and state environmental fee.

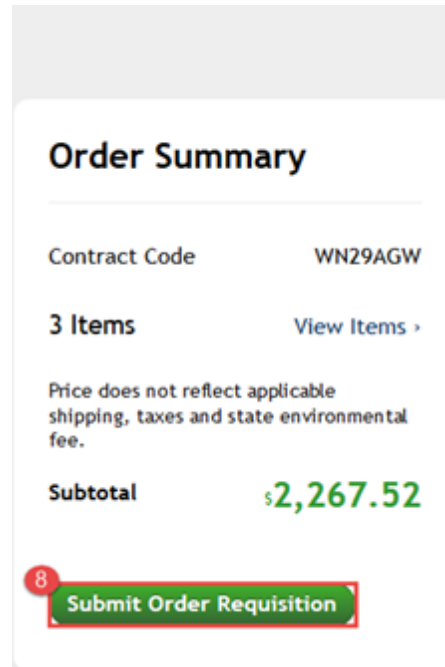
Subtotal: \$55.79

[Continue](#)

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.

Navigation: Favorites ▾ Main Menu ▾ > eProcurement ▾ > Requisition

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Home | Worklist | MultiChannel Console | Add to Favorites

New Window | Help | Person

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit: USC01 University of South Carolina Requisition Name:

*Requester: DORRELLK Kay Dorrell Priority: Medium

*Currency: USD

Cart Summary: Total Amount 55.79 USD

Expand lines to review shipping and accounting details [+ Add More Items](#)

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	Logitech - Wireless Desktop MK		DELL MARKETING LP	1.0000	Each	55.7900	55.79		Add	





Select All / Deselect All Select lines to: [+ Add to Favorites](#) [+ Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 55.79 USD

How to Create a Dell Punchout in PeopleSoft

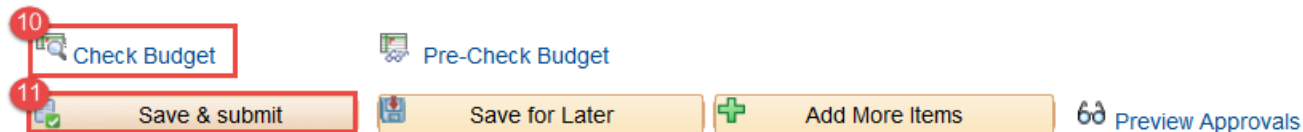


- The **Globe** icon indicates the line was brought in from the Dell Premier website.

Requisition Lines ?										
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	 Logitech - Wireless Desktop MK		DELL MARKETING LP	1.0000	Each	55.7900	55.79		 Add	

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.

Contact

Order Contact

First Name

MI

Last Name

Company Name

Email Address

Phone Number

Ext

Alt. Phone Number

Ext

Additional Email Recipient(s)

How to Use the Link in the Dell Email

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

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.edu1
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

eQuote Name	Dell Order	eQuote Description	A mouse needed for a new laptop
Saved By	JOANNEC@mailbox.sc.edu	Authorized Buyer Notes/Comments	Please select next day delivery as Shipping Option

- **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.

 **Web**
Browse Supplier Websites

[TEST - Fisher Punchout](#)
[Dell Punchout](#)

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

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.edu1
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


eQuote Name	Dell Order	eQuote Description	A mouse needed for a new laptop
Saved By	JOANNEC@mailbox.sc.edu	Authorized Buyer	
		Notes/Comments	Please select next day delivery as Shipping Option

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


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[CALENDAR](#) [MAP](#) [DIRECTORY](#) [GATEWAYS](#)

The Division of **Information Technology**

[SC.edu](#) » [About](#) » [Office](#) » [The I](#) » [PeopleSoft](#) » [Resources](#)

<h3 style="margin: 0;">General UPK Information</h3> <ul style="list-style-type: none"> • How to Use the UPK Player » 	<h3 style="margin: 0;">General PeopleSoft Information</h3> <ul style="list-style-type: none"> • USC PeopleSoft Glossary » • Request for PeopleSoft Finance Access »
<h3 style="margin: 0;">PeopleSoft Chart of Accounts</h3> <ul style="list-style-type: none"> • PeopleSoft Chart of Accounts » • New Code Structure » • A Quick Reference Guide to Categories » 	<h3 style="margin: 0;">PeopleSoft Workflow</h3> <ul style="list-style-type: none"> • ePro Requisition Approval Workflow » • Workflow Tip 1 » • Workflow Tip 2 » • Department Approvers »
<h3 style="margin: 0;">Payment Request Information</h3> <ul style="list-style-type: none"> • Payment Request Matrix » • Payment Request Guidelines » 	<h3 style="margin: 0;">eProcurement Information</h3> <ul style="list-style-type: none"> • Revised Quick Reference for Amount Only vs. Quantity » • Revised Quick Reference for Receiving in PeopleSoft » • Quick Reference for a Change Order » • Requisitioner Hands On Training PPT » • Receiving in PeopleSoft Webinar Recording » • Dell Punchout Webinar PPT » • Chrome Web Browser Update » • Internet Explorer Web Browser Update » • Mozilla Firefox Web Browser Update »

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!

