## Purchasing a Gift Card

- 1. Begin at uservices.case.edu, and you will see the below screen.
- 2. Click on the link labeled "Financials 9.2" (highlighted below)



- 3. After signing with CWRU SSO, you will be taken to the homepage, which will look similar to below (some tiles may not be there given your level of access).
- 4. Click into the "Procurement" Tile
  - a. If you do not see the tile it is because you do not have access, which in that case you should speak with your supervisor



5. After clicking into the "**Procurement**" tile, you will be looking at the below screen. To start a new request, click on "**Requisitions**".



6. You will then be brought to the requisition homepage, and from there you will need to select "**SmartCart**" (highlighted below). You will be brought to the "**SmartCart**" homepage.

Ş	Catalog Browse Catalogs All Purchasing Catalog Items	<u>(</u>	SmartCART Browse Supplier Websites SmartCART	Ę	Express Item Entry Create an Express Requisition
	Special Requests Create a non-catalog request		Forms Create and Submit Forms Business Card SDF Business Cards	<b>*</b>	Favorites Browse Favorite Items and Services
<b>-</b> ~	Templates	2	ePro Services		Recently Ordered
	Browse Company and Personal Templates	¥	Request Services Fixed Cost Service Variable Cost Service Time and Materials	ΠŒ	View recently ordered items and services Professional Chocolatier \$300 membership due's to be Custom Fabrication of Medica Lunar Festival Fireworks

7. On the "**SmartCart**" homepage, search by supplier to find the vendor "**BlackHawk**", who is the only authorized gift card vendor within our system.



8. Once you have found and clicked on "**BlackHawk Network Inc**", your screen will appear as it does below. Note the session timer - you will have 30 minutes to complete the transaction.

PunchOut	Your JAGGAER Session will expire in: 29:42 Reset Session	Cancel Pu
	Antoisont anna Mar annyatina a thanna ann an	
	Select Open or Closed Loop	
Are you purchasing:		
Select Purchasing Type	~	
Submit		

- 9. On this page, specify in the purchase details whether it is closed or open looped:
  - a. **Closed:** can only be used only at specified stores.
  - b. **Open:** can be used for any type of transaction from any store.
- 10. You will then be prompted to answer whether it is a physical or virtual gift card. (Keep in mind that there are generally additional fees for physical cards as well as shipping and handling expenses. See the end of the document for notes about virtual gift cards.)

Plastic or Digital?:		
Select Card Type	*	

11. After selecting you will then be brought to their Network Catalog.

Welcome Samuel, You are logged in as sxk1930€ Closed / Plastic / Bulk / Physical Closed Loop (Bu	②case.edu lik) [95037886] [Reset Choices]
SEARCH OUR CATALOG	Q
Physical	Contact Us
	28
	Welcome Samuel, You are logged in as sxk1930c Closed / Plastic / Bulk / Physical Closed Loop (Bu SEARCH OUR CATALOG Physical

12. Search the catalog and select the option you are looking for.

a. **Example**: A transaction for 2 \$50 Amazon gift cards and 2 \$20 Amazon gift cards would be a closed loop transaction, and your cart would look like the one below:

opping Cart				
Product	Quantity	Price	Total	
Amazon Gift Card \$20 Part #: Amazoncom-20	2	19.80	39.60	X Remove
Amazon Gift Card \$50 Part #: Amazoncom-50	2	49.50	99.00	X Remove
Update Cart			Subtotal	138.60
			Shipping Method	UPS Ground \$20.00 Shipping charges may vary depending on the quantity of cards ordered
			Total	\$158.60
			Continue Shopping	Proceed to Checkout

## 13. You will be prompted to review your order in their network catalog—click "checkout" once reviewed.

Checkout Instructions ress the checkout button below to send your sho	opping cart to the portal.			Subtotal: 138.60 Estimated Shipping Amount: 20.00 Shipping charges may vary depending on the quantity of cards ordered
	Qty.	Price	Subtotal	Shipping Method: UPS_GROUND Total: 158.60
Amazon Gift Card \$20 Part #: Amazoncom-20	2	19.80	39.60	Complete your order by clicking on the "Checkout" button below.
Amazon Gift Card \$50 Part #: Amazoncom-50	2	49.50	99.00	CHECKOUT

14. You will then be asked to review your order again in the "**SmartCart**" system - proceed to checkout once validated or assign to a cart approver if that is your department's protocol.

equisition • 186391967			۲	<del>0</del>	?	Assign Cart To Approver	Place Order
Summary Taxes/S&H Commer	ts Attachments	History					
General 💉					>	Draf	't →
						Total (158.60 USD)	~
3 Lines					••• 🗌 🕶	Shipping, Handling, ar are calculated and ch	nd Tax charges arged by each
Blackhawk Network Inc · 5 Items · 158	8.60 USD					supplier. The values s estimation purposes,	hown here are for budget checking,
SUPPLIER DETAILS						Subtotal	158 60
Item	Catalog No. Size/Packaging	Unit Price	Quantity	Ext. Price		Tax1	0.00
	Amazanaam = .				_	Tax2	0.00
Amazon Gift Card \$20	-20	19.80	Qty: 2 EA	39.60		Shipping	0.00
					*	Handling	0.00
Supplier 13827159 Part Auxilliary ID	Contract: no value		Commodit 00 y Code	0206 / Gift Ca	ards		158.60

15. Next you will have to click into the accounting lines of each item (the collapsible arrow to the left) within the cart and add the "Speedtype" that will be charged for the transaction.

	<ul> <li>Accounting Lines</li> </ul>										
	*Distribute I	By Amt V Spee	edChart Q								
	Accounting Lines							Persor	alize   Find   View All	2	First 🔞
	Chartfields1 Ch	artfields2 Details 2 Asset I	Information 💷								
	Line Percent	Amount Spe	eed Type Account	Event	Fund	Dept	Project			Class	
	1 100.00	39.60	Q 533770	۹ ۵	2						Open
📙 🗆 2 🍈 Amazon Gift Card \$50		Blackhawk Network, Inc.	2.0000	Each	49.5000	99.00	P-		Û		
🕨 🗆 3 🚳 UPS_GROUND		Blackhawk Network, Inc.	1.0000	Each	20.0000	20.00		🖓 Add	Û		
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	ta Ma	ss Change					

- 16. You will then be asked to review it once more, but as one will see it is now in the standard requisition system. Validate once again and move forward.
  - a. You will need to click "Check Budget" first

## b. Then click "Save & Submit"

pand lines to review shipping and account	ting details			Add More Ite	ms				
Requisition Lines 🕜									
Line Description	Item ID	Vendor	Quantity	UOM	Price	Total	Details	Comments	Delete
🕨 🗆 1  🍈 Amazon Gift Card \$20		Blackhawk Network, Inc.	2.0000	Each	19.8000	39.60		🖓 Add	Î
🕨 🗆 2 🇃 Amazon Gift Card \$50		Blackhawk Network, Inc.	2.0000	Each	49.5000	99.00		🖓 Add	Î
F 🗆 3 🍈 UPS_GROUND		Blackhawk Network, Inc.	1.0000	Each	20.0000	20.00		🖓 Add	Î
Select All / Deselect All	Select lines to:	Add to Favorites	Add to Template(s)	Delete Selected	t €N	lass Change			
					Total Amount	158.60 USD			
Enter requisition comments									
							2		
							1.		
□ Send to Supplier □ Sh	ow at Receipt	Shown at Voucher							
proval Justification									
Enter approval justification for this requisit	tion								
							2		
							le		
Check Budget									

After it has been submitted it will be sent to the appropriate approvers in the workflow.

**Attention:** If you purchased virtual gift cards, you will be sent a link to set up an account with BlackHawk's "Hawk Marketplace". If you are not sent a link, contact CWRU's liaison John Gross (John.Gross@bhn.com).

Hawk <b>Marketplace</b>
USER INVITE
Hello 1490Samuel,
You're now ready to set up an account on Hawk Marketplace. Use the button below to complete your account setup. Note: This link will only be valid for the next 24 hours.
COMPLETE ACCOUNT SETUP
Thank you, Your partners at Hawk Marketplace
This email was automatically generated. Please do not reply.