

## **CM - Tips & Tricks**

(Troubleshooting and other good things to know)

- **Search Bar**

- Works for “Hosted catalogs” and some “PunchOut catalogs”.

- Using the search bar will allow you to compare different vendor pricing for the same item.

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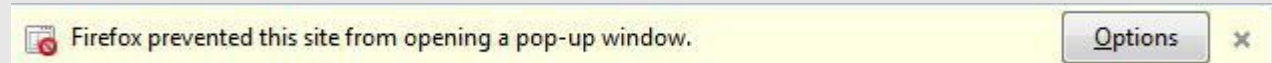
- **Login is through Single Sign-On through CSU Connect**

- Use normal campus username & password

- **“Campus Marketplace” Name**

- suppliers may not know CSU-specific name (eprocurement “punch-out catalog”)

- **Pop-up blocker**



- Allow pop-ups from eprocurement.esmsolutions.com
  - usually just a one-time setup

- **Spinning icon**



- there's something going on with another pop-up window
  - check other windows (in background) or hit F5 to refresh screen


## **CM - Tips & Tricks (cont.)**

(Troubleshooting and other good things to know)

- **Supplier Accounts on the PunchOut catalog**
  - may show past orders, history, invoices, quotes, etc.
  - different with every supplier
- **Quote to Cart**
  - automatically populates cart with items and special pricing
  - most suppliers include this
- **Order Status**
  - watch for “Unsubmitted Transaction” or “Release Failed”
- **Next Step**
  - View Order, Prepare CC Order
- **Checkout Tab** – final Credit Card order also appears under “Checkout tab”
- **Checkout Tab** – review all orders, including past orders (use selection filter)

## **CM - Tips & Tricks (cont.)**

(Troubleshooting and other good things to know)

- **Workflow**
  - Humboldt does not utilize at this time, maybe in the future
- **Transactions Separated by Supplier**
- **Click the arrow to expand for more details**
  - in Checkout tab, shows all items on the order, qty., price, etc.
- **Credit Card Number Security**
  - C.M. remembers all your info except CC#, have to enter each order
- **“Home” Button** 
- **“Back” Button** – Right-click, back arrow or “Back”
- **“PO#” = the “CC Order Number”**
- **Bill to - (Credit Card)**
- **Ship To – Attn:** - should appear on shipping label



\* Ship To - Attn:

## **CM - Tips & Tricks (cont.)**

(Troubleshooting and other good things to know)

- **Validate**
  - if any item or information is changed in the transaction, click validate
- **Profile**
  - Contact Procurement for changes/corrections
- **Transfer Cart** – “Edit Transfer Cart”
  - Change to transfer the cart to someone other than the default
- **Transfer Cart** – I got the email notification, but where's the cart?
  - in the Checkout Tab
- **When Ordering, be aware of:**
  - Minimum orders
  - Shipping costs
  - Sales Tax
  - Supplier specifics