Campus Marketplace

Training for ProCard Holders

Revised November 2018

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ESM Campus Marketplace Overview

Humboldt is one of the campuses participating in this project. The system configuration is based upon input from all participating campuses and ensures the best contracted pricing from a wide variety of suppliers.
Shopping Overview

As a ProCard holder, you will have the ability to shop and place orders. You may also place transactions from non-Pro card holders who have the ability to shop only, and then forward their orders to you to process.

When you log into the Campus Marketplace you will see the Shopping page. There are three main components:

<table>
<thead>
<tr>
<th>The Campus Marketplace banner with all participating campuses’ logos.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Information Box in the right-hand column, which contains general information shared by all campuses - including a link to the Administrators’ contact information. A scroll bar may be present based on the amount of content.</td>
</tr>
<tr>
<td>The Catalog Categories on the left, which contains all current catalogs. To select a catalog, click on a catalog logo. Users can also search for items in the Search Bar at the top of the screen.</td>
</tr>
</tbody>
</table>
Catalog Types

<table>
<thead>
<tr>
<th>Punch-Out Catalog Definition</th>
<th>Hosted Catalog Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Supplier manages own site/uploads items &amp; prices continuously</td>
<td>• Transaction is processed completely within ESM site</td>
</tr>
<tr>
<td>• Most national Suppliers</td>
<td>• Local, regional supplier</td>
</tr>
<tr>
<td>• Dynamic link, electronic connection from supplier with full catalog</td>
<td>• Excel spreadsheet from supplier</td>
</tr>
<tr>
<td>• Shop within Supplier site, but still remain connected to the ESM site</td>
<td>• Stagnant data</td>
</tr>
<tr>
<td>• Supplier receives order at ordering info center</td>
<td>• Suppliers less technically capable</td>
</tr>
<tr>
<td>• Seamless</td>
<td></td>
</tr>
</tbody>
</table>

Example Purchases

Example 1—Punch Out Catalog Order

From the Shop page, press the punch-out catalog you want to order from.

You will see this message. Press OK or wait.

Once the catalog loads, select the item(s) you want to order.

Press: Add to Order or supplier’s terminology for adding items.

Note: All punch-out supplier catalogs & terminology will vary.
Press the **My Order** link (or Supplier's terminology for Shopping Cart).

Note: All punch-out supplier catalogs & terminology will vary.

When finished ordering, press Submit Requisition or Supplier’s terminology for returning to the Campus Marketplace.

Note: All punch-out supplier catalogs & terminology will vary.

You will punch back in to Campus Marketplace.

The items are now in your cart.

Press the **Cart** button to view item(s).

Delete or update item(s), optional.

When done, press **Continue** to move to Checkout.
Complete/Review each section of information and verify items ordered under **Line Item Details**. Select **Continue** to save.

Delete or update item(s), optional. Add external or internal notes and/or attachments.

The PO Number and the transaction number display under **General Details** and **Transaction Summary**. You will use these for tracking later.

Press **Request Approval**, then **Prepare CC Order**.

You are now on the **Credit Card Order** page.

Enter your credit card number.

Press **Continue**.
**Press Place Order.**

Order is now submitted to Supplier.

You can print the order for your records, optional. You will receive a confirmation email from ESM. Please note, this order document cannot be used for ProCard reconciliation. You must submit the supplier’s itemized receipt or invoice.

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**Example 2 – Hosted Catalog Order**

Select a hosted Catalog.

Note: You can tell, which catalogs are Hosted on the Shop Page. They do not have the catalog type listed.

Click the quantity box for each item you want to order.

Note, the quantity defaults to 1 as soon as you click on it.

Override if necessary. **Add to Cart** button will highlight.

Press Add to Cart.
There is 1 item in cart.

Press the Cart button to view item(s)

When done, press Continue to move to Checkout.

Complete/Review each section of information and verify items ordered under Line Item Details. Select Continue to save.

Delete or update item(s), optional.

The PO Number and the transaction number display under General Details and Transaction Summary. You will use these for tracking later.

Press Request Approval, then Prepare CC Order.

You are now on the Credit Card Order page.

Enter card number.

Press Continue.
Press Place Order.

Order status is now Submitted to Supplier.

You can print the order for your records, optional. Please note, this order cannot be used for ProCard reconciliation. You must submit the supplier's itemized receipt or invoice.

You will receive a confirmation email from ESM.
Example 3 – Catalog order to multiple Suppliers

<table>
<thead>
<tr>
<th>From the Shop Page, Select the first <strong>Catalog</strong> you want to order from. Put the item(s) in your Marketplace cart by following the instructions for the catalog type (punch-out or hosted).</th>
</tr>
</thead>
<tbody>
<tr>
<td>The items from both catalogs are now in your cart.</td>
</tr>
<tr>
<td>Click on <strong>Cart</strong>.</td>
</tr>
<tr>
<td>Select <strong>Checkout</strong> and confirm the conversion of multiple carts.</td>
</tr>
</tbody>
</table>
You are now in the All Transactions page. Notice there are 4 separate transaction #s and PO Numbers, one for each supplier.

Press the transaction name to review your items. You can delete item(s) or update quantity, optional.

Press Request Approval, then Prepare CC Order.

Enter your credit card info for the first order. Press Continue.
Press **Place Order**.

![Image of the easyPurchase training screen]

You will be taken back to the Shop Page.

Select All Transactions to Repeat process to order from remaining Supplier(s).

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**Transfer Cart Ordering**

This process is for Credit Card holders who are designated as “Submitters” to place orders for non-ProCard holders.

You will receive an email advising there is a transaction pending your review and action.

The item(s) will be in your cart. Review the transactions and make any necessary changes.

Complete the transaction by using your ProCard.

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From: noreply@esmsolutions.com

Sent: Tuesday, September 30, 2014 9:15 AM

To: Becky A. Pepping


Dear Becky,

Ruth Carrington, Bldg 75 has created Transaction 13462 - 09/30/2014-09:15-Pepping, Bldg75-Henry Schein Inc.. Please click here to log in to the easyPurchase application to take appropriate action.

If you wish to contact the originator, please do so at recarrington@cpp.edu.
Extracts (Report Data)

An Extract is similar to a report from which you can track your activity in a .csv format that can easily be downloaded to Excel.

The Activity Extract lists all the activity and related data for a specified time range.

Menu>Extracts

Select a User Activity Extract.

Enter an Extract Name. Enter a date range. Press Go.

This message will appear. Press OK.

The Extract Name will appear in the list of Extracts. Press Refresh periodically until the name highlights.
Note: Only your last three extracts appear on this page. If you want to save the extract information, be sure to download it to Excel.

Click on the Extract Name. Extract will open in Excel.

<table>
<thead>
<tr>
<th>User Name</th>
<th>User Email</th>
<th>Transaction Status</th>
<th>Transaction Order Num</th>
<th>Create Date</th>
<th>Order Type</th>
<th>Supplier/ID</th>
<th>Catalog No</th>
<th>Preferred Supplier</th>
<th>Supp</th>
</tr>
</thead>
</table>