Campus Marketplace

eProcurement Training
for CSU P-card Holders

Spring 2015
## Contents

ESM Campus Marketplace Overview ........................................................................................................ 2
How to Log in to the Shopping Site ........................................................................................................... 2
Catalog Types ..................................................................................................................................................... 4
Example Purchases .......................................................................................................................................... 4
  Example 1 - Keyword search for Hosted Catalog ............................................................................ 4
  Example 2 - Punch Out Catalog Order ............................................................................................. 6
  Example 3 - Catalog order to multiple Suppliers ............................................................................ 8
Transfer Cart ................................................................................................................................................... 10
Extracts (Report Data) ............................................................................................................................. 12
**ESM Campus Marketplace Overview**
San Francisco State University is one of 10 campuses participating in this E-Procurement project. The system configuration is based upon input from all 10 campuses and ensures the best discounted pricing from a wide variety of suppliers.

**How to Log in to the Shopping Site**
The Campus Marketplace website address is: [https://eprocurement.esmsolutions.com/](https://eprocurement.esmsolutions.com/)

Once you have been set up in the Campus Marketplace, you will receive an email from ESM Solutions similar to the one below. Click the link to reset your password.

Once in the page, enter your email address and click the **Forgot Password** link and follow instructions.

You will be asked to select and answer a challenge question and create your own password.
Once this is done, you can start using the Campus Marketplace.

**Shopping Overview**

As an SFSU p-card holder, you will have the ability to shop and place orders. You may also place transactions from non-pcard holders who have the ability to shop only, and then forward their orders to you to process. See “Transfer Cart” Section on page 10.

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

<table>
<thead>
<tr>
<th>The <strong>Campus Marketplace banner</strong> with all participating campuses’ logos.</th>
<th><img src="image" alt="Campus Marketplace banner" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>Information Box</strong> in the left hand column which contains general information shared by all 10 campuses - including a link to the Administrators’ contact information.</td>
<td><img src="image" alt="Information Box" /></td>
</tr>
<tr>
<td>The <strong>Catalog Box</strong> on the right which contains all current catalogs.</td>
<td><img src="image" alt="Catalog Box" /></td>
</tr>
</tbody>
</table>

There are two ways to select a catalog – via the drop down menu or by clicking on a catalog.
You can also use a Keyword to search from all **hosted** (definition below) catalogs.

### Catalog Types

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

### Example Purchases

**Example 1 - Keyword search for Hosted Catalog**

Enter a **Keyword** in the search box.

Press Go.

A list of all items matching the keyword for all **hosted** catalogs will display.

Note, more than one supplier’s items may display.

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

Note, the quantity defaults to 1.
Override if necessary.

Add to Cart button will highlight.
Press.

There is 1 item in cart.

Press the Cart button to view item(s)
When done, press Continue to move to Checkout.

Press small triangle on left side to expand the view. Verify items ordered
Delete or update item(s), optional.
Press Prepare.

Note: “Prepare” displays at top and bottom. You can select either one.
You are now on the Credit Card Order page.

Enter card number.

Press Continue.

Press Place Order.

Order status is now Submitted to Supplier.

Example 2 - Punch Out Catalog Order

From 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.

Press: My Order (or Supplier’s terminology for Shopping Cart).

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

When finished ordering, press Submit Requisition or Supplier’s terminology for returning to the Campus Marketplace.
### Example 3 - Catalog order to multiple Suppliers

From the Shop Page,

Select the first **Catalog** you want to order from.

Press **Add to Cart**.

Select the **next Supplier** from the drop down list.

Press **Go**.

Enter the **quantity**.

Press **Add to Cart**.

Notice there are now items in your cart from both Suppliers.

Click on **Cart**.

Press **Continue**.

There are two transactions, one for each Supplier.

Click the small triangle to the left of each transaction to see the details.

Press **Prepare** on the first transaction.
Enter your **credit card** info.

Press **Continue**.

Press **Place Order**.

You will be taken back to checkout.

**Repeat** process to order from 2\textsuperscript{nd} Supplier.
Transfer Cart

Once Procurement receives a request for access to the Campus Marketplace from a non P-cardholder (the Originator), their account will be set up. The Originator will not have the checkout link.

The Originator shops and places item(s) in the cart. Once the Originator is done shopping, press the “Continue” button.

The following message will be displayed once the “Continue” button is clicked:

The Originator should then click the “Transfer Shopping Cart” button.

A message will appear across the top of the page to let the Originator know the cart has been forwarded to the order Submitter (Department P-Card Holder).
The Submitter will receive the following email:

From: noreply@esmsolutions.com  [mailto: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](http://www.esmsolutions.com) to log in to the easyPurchase application to take appropriate action.

If you wish to contact the originator, please do so at recarrington@csupomona.edu.

Thank you,
ESM Solutions Customer Support Server
NOTE: This is a system generated email. Please do not reply to this email.

The Submitter will review the cart and make any necessary changes, deletions, etc. The Submitter will then complete the order by inputting their credit card information.
**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.