



Campus Marketplace

Training Guide for University ProCard Holders

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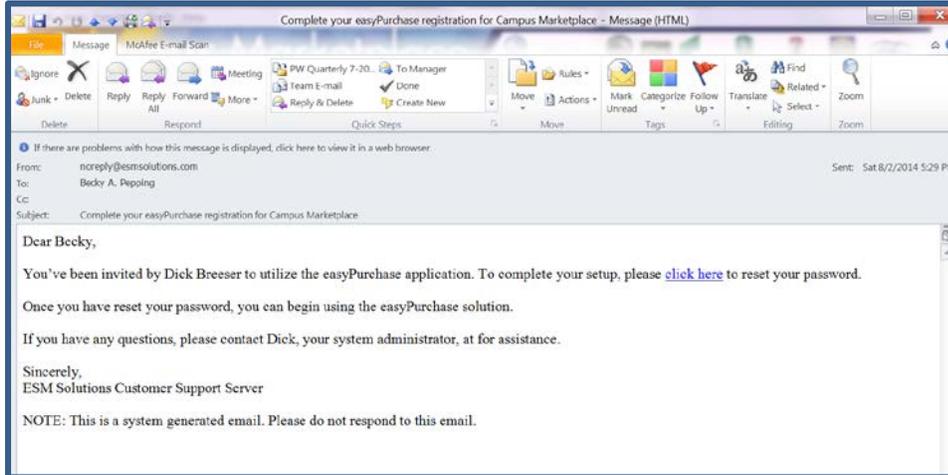
ESM Campus Marketplace Overview

CSU Channel Islands is one of the 9 campuses participating in this E-Procurement project. The system configuration is based upon input from all 9 campuses and ensures the best contracted pricing from a wide variety of suppliers.

How to Log in to the Shopping Site

The Campus Marketplace website address is: <https://csuci/procurement/marketplace>

Once you have been set up in the Campus Marketplace, you will receive an email from ESM Solutions similar to 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.

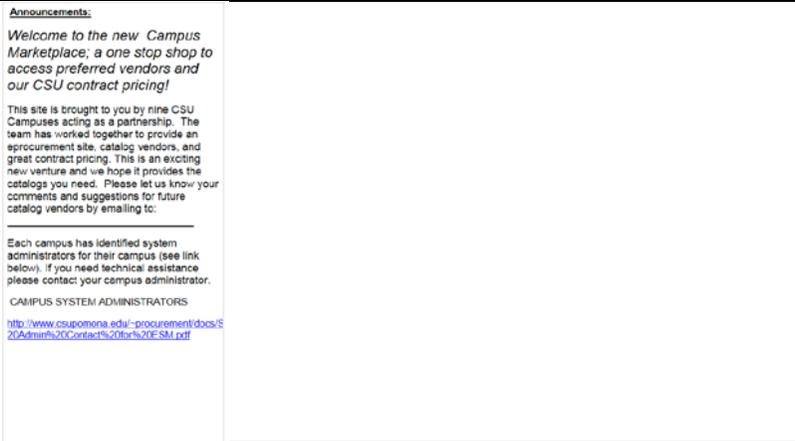
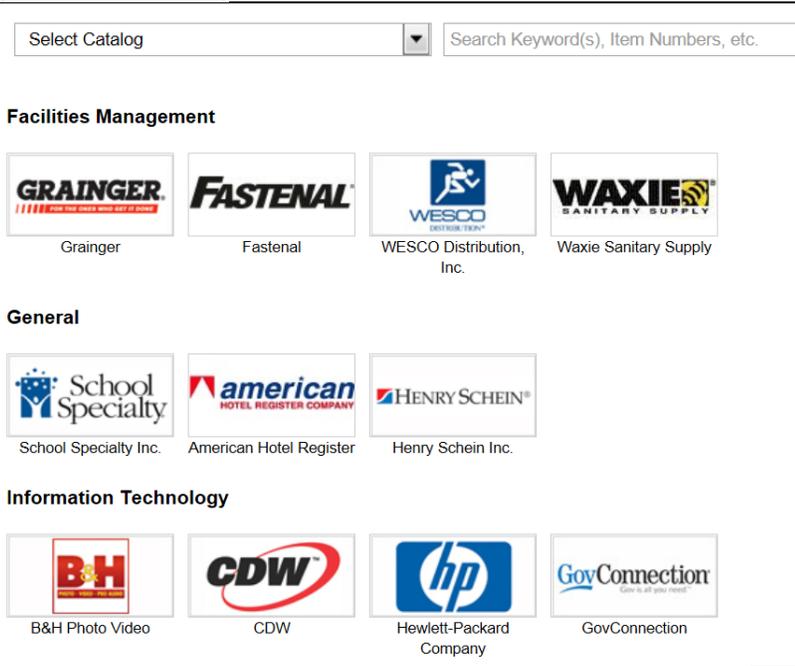


Once this is done, you can start using the Campus Marketplace.

Shopping Overview

As a state ProCard holder, you will have the ability to shop and place orders. You may also place transactions from non-ProCard 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:

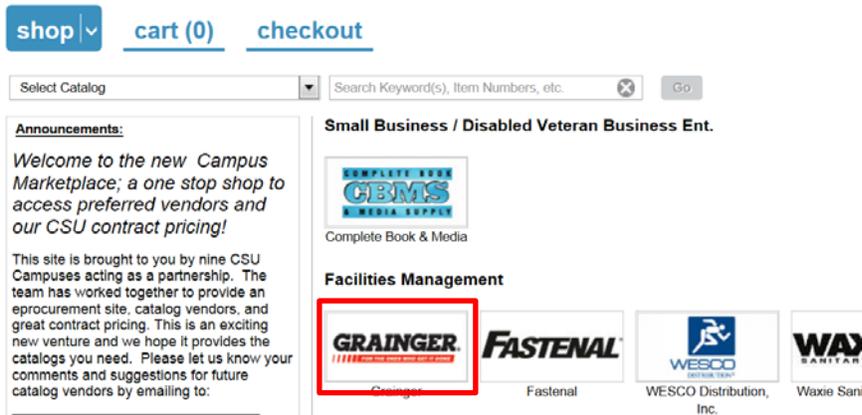
<p>The Campus Marketplace banner with all participating campuses' logos.</p>	
<p>The <i>Information Box</i> in the left hand column which contains general information shared by all 9 campuses - including a link to the Administrators' contact information.</p>	
<p>The <i>Catalog Box</i> on the right which contains all current catalogs.</p> <p>There are two ways to select a catalog – via the drop down menu or click on a catalog.</p>	
<p>You can also use a Keyword to search from all hosted catalogs (definition below).</p>	

Catalog Types

Hosted Catalog Definition	Punch-Out Catalog Definition
<ul style="list-style-type: none"> Transaction is processed completely within ESM site Local, regional supplier Excel spreadsheet from supplier Stagnant data Suppliers less technically capable 	<ul style="list-style-type: none"> Supplier manages own site/updates items & prices continuously Most national Suppliers Dynamic link, electronic connection from supplier with full catalog Shop within Supplier-site, but still remain connected to the ESM site Supplier receives order at ordering info center Seamless

Example Purchases

Example 1 - Punch Out Catalog Order

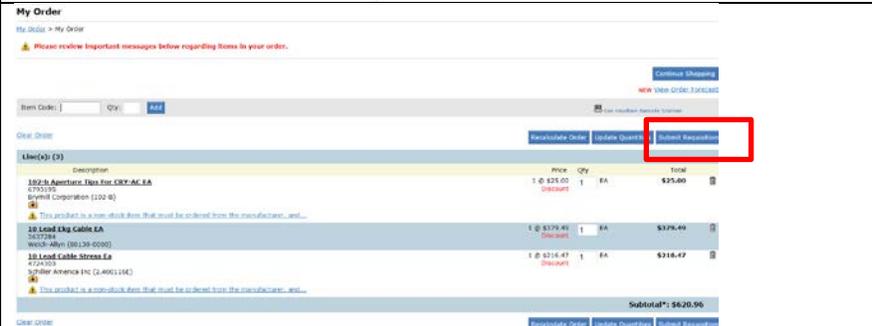
<p>From Shop page, press the punch-out catalog you want to order from.</p>	 <p>The screenshot shows the 'shop' page with a navigation bar containing 'shop', 'cart (0)', and 'checkout'. Below the navigation is a search bar and a list of suppliers under the heading 'Small Business / Disabled Veteran Business Ent.'. The suppliers listed are GBMS (Complete Book & Media), Grainger (highlighted with a red box), Fastenal, WESCO Distribution, Inc., and Waxie Sani.</p>
<p>You will see this message. Press OK or wait.</p>	 <p>The dialog box contains the text: 'It may take 5 to 20 seconds to connect to your supplier's website. If you do not connect, please disable your popup blocker and resubmit the request.' There is an 'OK' button at the bottom.</p>
<p>Once the catalog loads, select the item(s) you want to order.</p> <p>Press: Add to Order.</p>	 <p>The screenshot shows a search results page with a table of items. The table has columns for Description, Item Status, Price, Qty, and Last Purchased. Three items are highlighted with red circles around the Qty column: '10 Lead Cable Stress Ea', '10 Lead Ekg Cable EA', and '102-lb Aperture Tips For CRY-AC EA'. Each of these items has a Qty of 1.</p>

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 2 - Hosted Catalog Order

Enter a Keyword in the search box.

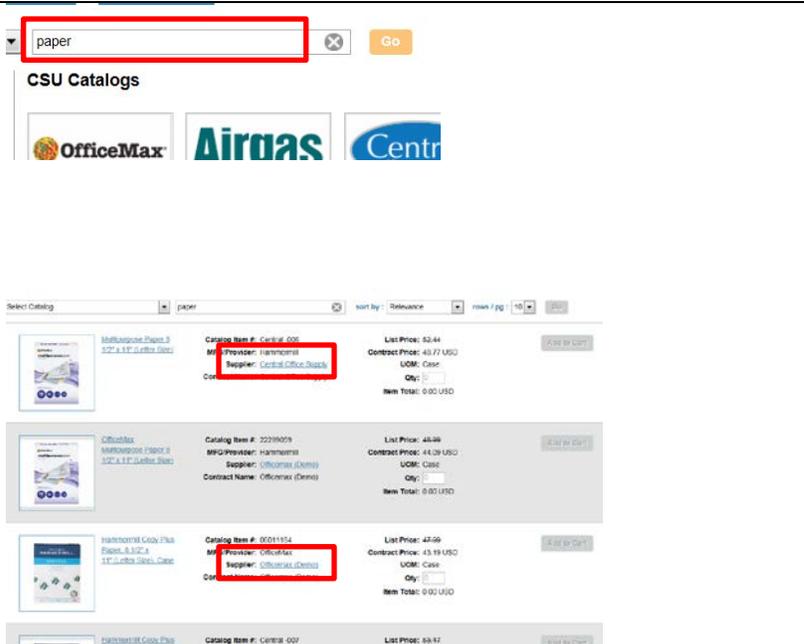
Press **Go**.

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.

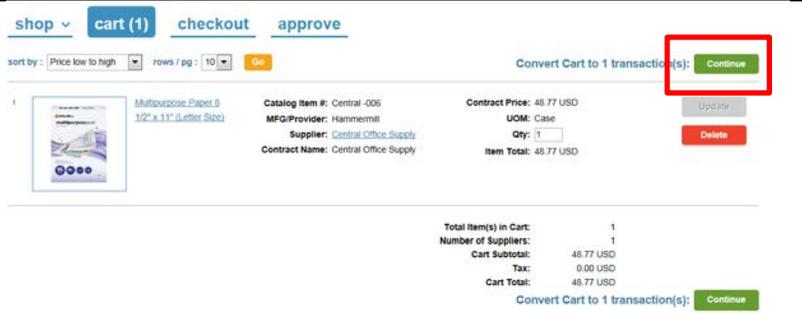


There is 1 item in cart.



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

When done, press **Continue** to move to Checkout.

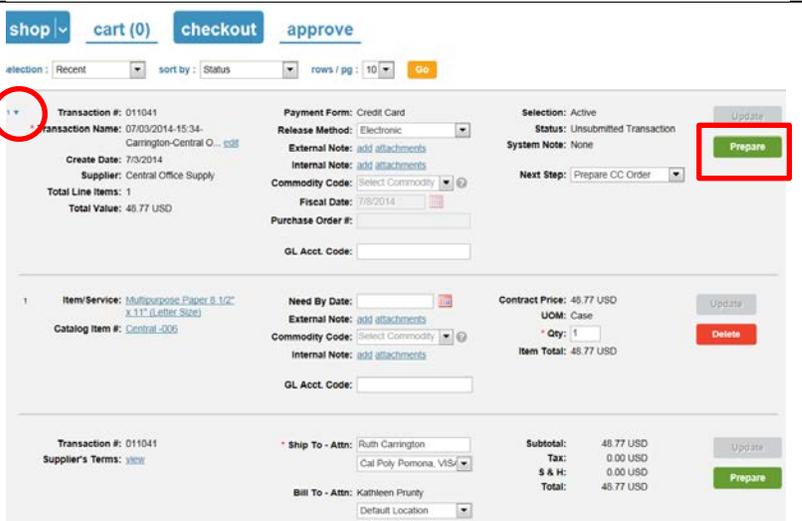


Press small triangle on left side to expand the view. Verify items ordered

Delete or update item(s), optional.

Press **Prepare**.

Note: "Prepare" displays at top and bottom. You can select either one.



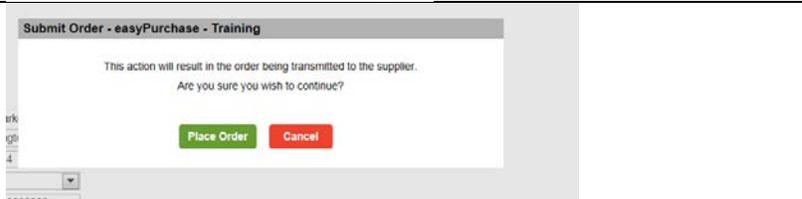
You are now on the Credit Card Order page.

Enter card number.

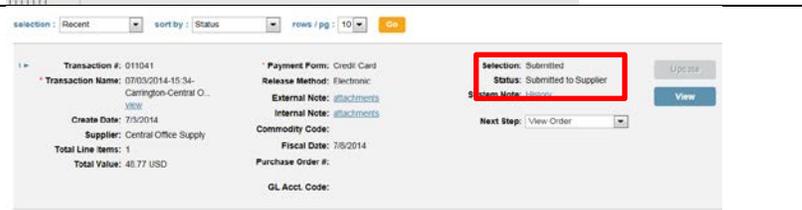
Press **Continue**.



Press **Place Order**.

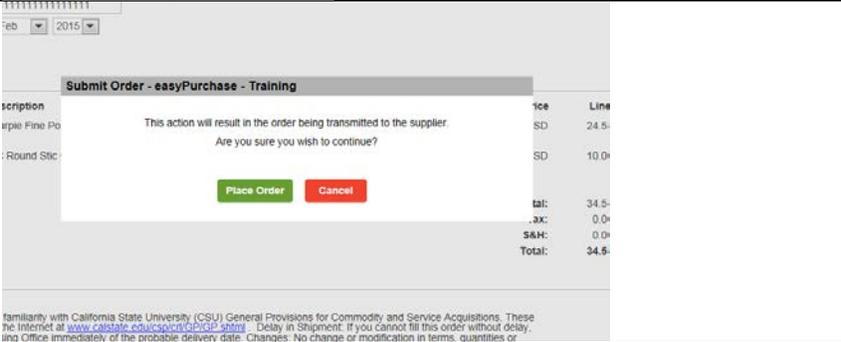
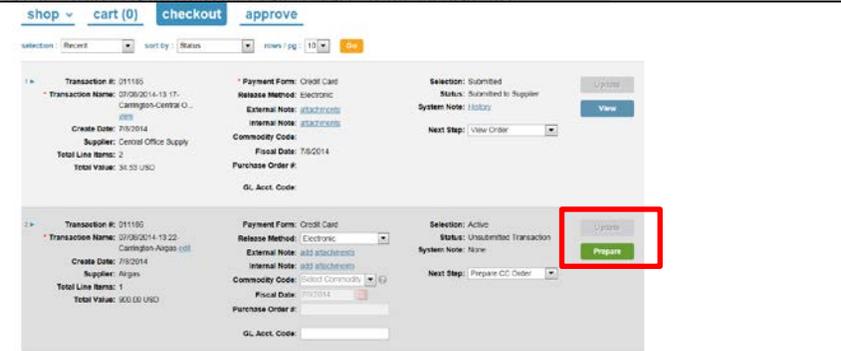


Order status is now Submitted to Supplier.



Example 3 - Catalog order to multiple Suppliers

<p>From the Shop Page, Select the first Catalog you want to order from. Press Add to Cart.</p>	
<p>Select the next Supplier from the drop down list. Press Go.</p>	
<p>Enter the quantity. Press Add to Cart.</p>	
<p>Notice there are now 5 in your cart including items from both Suppliers. Click on Cart. Press Continue.</p>	
<p>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.</p>	

<p>Enter your test credit card info.</p> <p>Press Continue.</p>	
<p>Press Place Order.</p>	
<p>You will be taken back to checkout.</p> <p>Repeat process to order from 2nd Supplier.</p>	

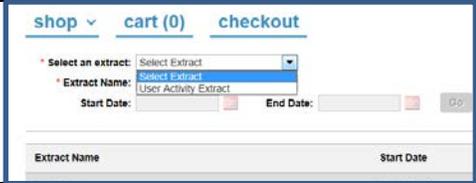
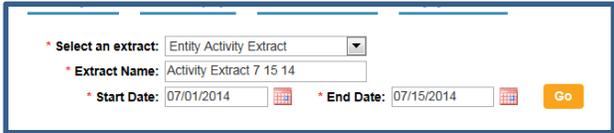
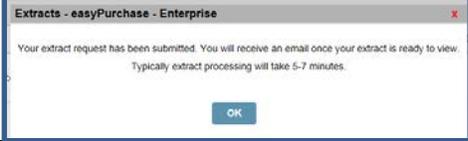
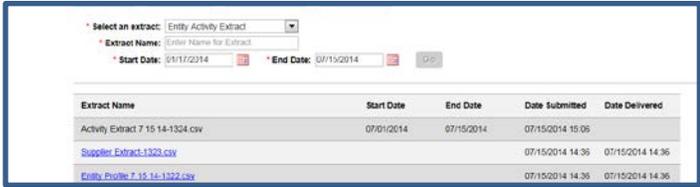
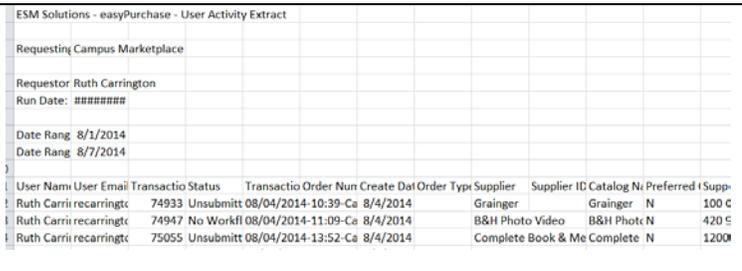
Transferred Cart Ordering

<p>You will receive an email advising there is a transaction pending your review and action.</p> <p>The item(s) will be in your cart. Review the transactions and make any necessary changes.</p> <p>Complete the transaction by using your ProCard.</p>	<p>From: noreply@esmsolutions.com [mailto:noreply@esmsolutions.com] Sent: Tuesday, September 30, 2014 9:15 AM To: Becky A. Pepping Subject: New Transaction from Cart Transfer – Transaction 13462 - 09/30/2014-09:15-Pepping, Bldg75-Henry Schein Inc.</p> <p>Dear Becky,</p> <p>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.</p> <p>If you wish to contact the originator, please do so at recarrington@csupomona.edu.</p>
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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.

<p>Menu>Extracts</p>																																																	
<p>Select a User Activity Extract.</p>																																																	
<p>Enter an Extract Name. Enter a date range. Press Go.</p>																																																	
<p>This message will appear. Press OK</p>																																																	
<p>The Extract Name will appear in the list of Extracts. Press Refresh periodically until the name highlights. Note: Only <u>your</u> 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.</p>	 <table border="1" data-bbox="776 1171 1393 1262"> <thead> <tr> <th>Extract Name</th> <th>Start Date</th> <th>End Date</th> <th>Date Submitted</th> <th>Date Delivered</th> </tr> </thead> <tbody> <tr> <td>Activity Extract 7 15 14-1324.csv</td> <td>07/01/2014</td> <td>07/15/2014</td> <td>07/15/2014 15:06</td> <td></td> </tr> <tr> <td>Supplier Extract-1323.csv</td> <td></td> <td></td> <td>07/15/2014 14:36</td> <td>07/15/2014 14:36</td> </tr> <tr> <td>Entity Profile 7.15.14-1322.csv</td> <td></td> <td></td> <td>07/15/2014 14:36</td> <td>07/15/2014 14:36</td> </tr> </tbody> </table>	Extract Name	Start Date	End Date	Date Submitted	Date Delivered	Activity Extract 7 15 14-1324.csv	07/01/2014	07/15/2014	07/15/2014 15:06		Supplier Extract-1323.csv			07/15/2014 14:36	07/15/2014 14:36	Entity Profile 7.15.14-1322.csv			07/15/2014 14:36	07/15/2014 14:36																												
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<p>Extract will open in Excel.</p>	 <table border="1" data-bbox="703 1360 1445 1631"> <thead> <tr> <th>User Name</th> <th>User Email</th> <th>Transaction ID</th> <th>Status</th> <th>Transaction Order Number</th> <th>Create Date</th> <th>Order Type</th> <th>Supplier</th> <th>Supplier ID</th> <th>Catalog Number</th> <th>Preferred Item</th> <th>Supplier Price</th> </tr> </thead> <tbody> <tr> <td>Ruth Carrir</td> <td>recarringt</td> <td>74933</td> <td>Unsubmit</td> <td>08/04/2014-10:39</td> <td>Ca 8/4/2014</td> <td></td> <td>Grainger</td> <td></td> <td>Grainger</td> <td>N</td> <td>100 C</td> </tr> <tr> <td>Ruth Carrir</td> <td>recarringt</td> <td>74947</td> <td>No Workfl</td> <td>08/04/2014-11:09</td> <td>Ca 8/4/2014</td> <td></td> <td>B&H Photo Video</td> <td></td> <td>B&H Photo</td> <td>N</td> <td>420 E</td> </tr> <tr> <td>Ruth Carrir</td> <td>recarringt</td> <td>75055</td> <td>Unsubmit</td> <td>08/04/2014-13:52</td> <td>Ca 8/4/2014</td> <td></td> <td>Complete Book & Me</td> <td></td> <td>Complete</td> <td>N</td> <td>1200</td> </tr> </tbody> </table>	User Name	User Email	Transaction ID	Status	Transaction Order Number	Create Date	Order Type	Supplier	Supplier ID	Catalog Number	Preferred Item	Supplier Price	Ruth Carrir	recarringt	74933	Unsubmit	08/04/2014-10:39	Ca 8/4/2014		Grainger		Grainger	N	100 C	Ruth Carrir	recarringt	74947	No Workfl	08/04/2014-11:09	Ca 8/4/2014		B&H Photo Video		B&H Photo	N	420 E	Ruth Carrir	recarringt	75055	Unsubmit	08/04/2014-13:52	Ca 8/4/2014		Complete Book & Me		Complete	N	1200
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