Campus Marketplace
Training Guide for University ProCard Holders
Contents

ESM Campus Marketplace Overview ........................................................................................................ 2
How to Log in to the Shopping Site ........................................................................................................ 2
  Catalog Types ........................................................................................................................................ 4
Example Purchases .................................................................................................................................. 4
  Example 1 - Punch Out Catalog Order ............................................................................................... 4
  Example 2 - Hosted Catalog Order ...................................................................................................... 5
  Example 3 - Catalog order to multiple Suppliers ................................................................................ 7
Transferred Cart Ordering ...................................................................................................................... 8
Extracts (Report Data) .......................................................................................................................... 9
**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](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.

![Reset Password Email](image)

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

![Login Page](image)

You will be asked to select and answer a challenge question and create your own password.

![Challenge Question](image)

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:

<table>
<thead>
<tr>
<th>The Campus Marketplace banner with all participating campuses’ logos.</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>Information Box</strong> in the left hand column which contains general information shared by all 9 campuses - including a link to the Administrators’ contact information.</td>
</tr>
<tr>
<td>The <strong>Catalog Box</strong> on the right which contains all current catalogs.</td>
</tr>
<tr>
<td>There are two ways to select a catalog – via the drop down menu or click on a catalog.</td>
</tr>
</tbody>
</table>

You can also use a Keyword to search from all hosted catalogs (definition below).
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>• Supplier manages own site/updates items &amp; prices continuously</td>
</tr>
<tr>
<td>• Local, regional supplier</td>
<td>• Most national Suppliers</td>
</tr>
<tr>
<td>• Excel spreadsheet from supplier</td>
<td>• Dynamic link, electronic connection from supplier with full catalog</td>
</tr>
<tr>
<td>• Stagnant data</td>
<td>• Shop within Supplier-site, but still remain connected to the ESM site</td>
</tr>
<tr>
<td>• Suppliers less technically capable</td>
<td>• Supplier receives order at ordering info center</td>
</tr>
<tr>
<td></td>
<td>• Seamless</td>
</tr>
</tbody>
</table>

Example Purchases

Example 1 - 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).

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**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

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 5 in your cart including items 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 test credit card info.
Press Continue.

Press Place Order.

You will be taken back to checkout.
Repeat process to order from 2nd Supplier.

**Transferred Cart Ordering**

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.

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@csupomona.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.