



Campus Marketplace

Training for P-card Holders

Revised April 2018

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ESM Campus Marketplace Overview

CSU Chancellor's Office is one of the 10 (soon 14) 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

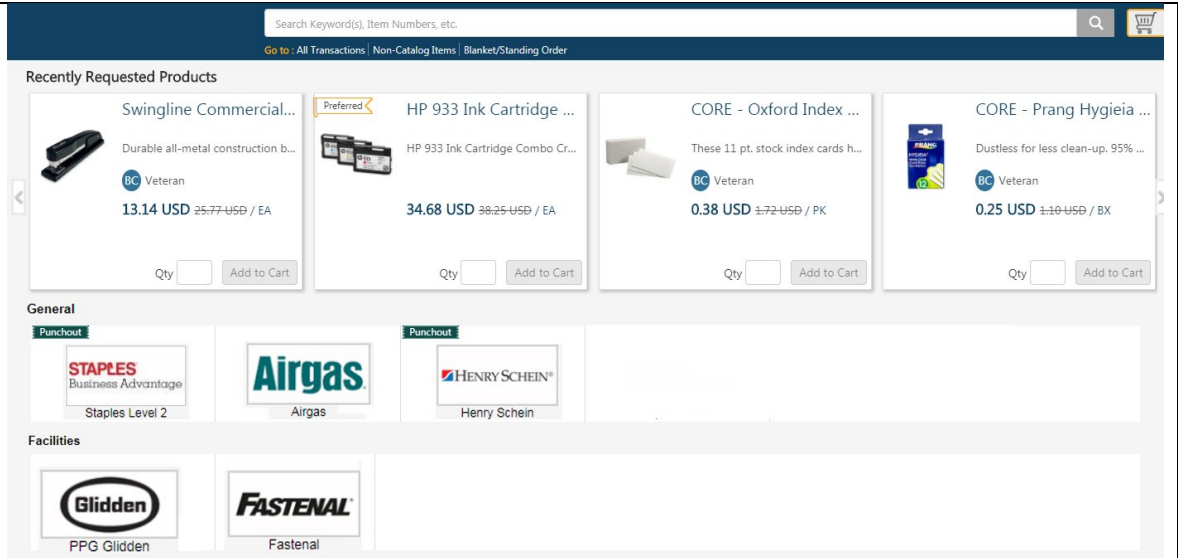
As a p-card holder, you will have the ability to shop and place orders. You may also place transactions from non-p-card holders who have the ability to shop only, and then forward their orders to you to process.

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

<p>The Campus Marketplace banner with all participating campuses' logos.</p>	
<p>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</p>	<p>Announcements: Welcome to our Campus Marketplace,</p> <p>Supplier Descriptions - link</p> <p>System Administrators by Campus - link</p> <p>OfficeMax is the Systemwide Office Supply Contract. Please use the CSU OfficeMax site for all office supplies orders.</p> <p><u>This site is for official university business. It is not intended or authorized for personal use.</u></p> <p><i>CSU East Bay: One of our ten member campuses</i></p> 

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.



Catalog Types

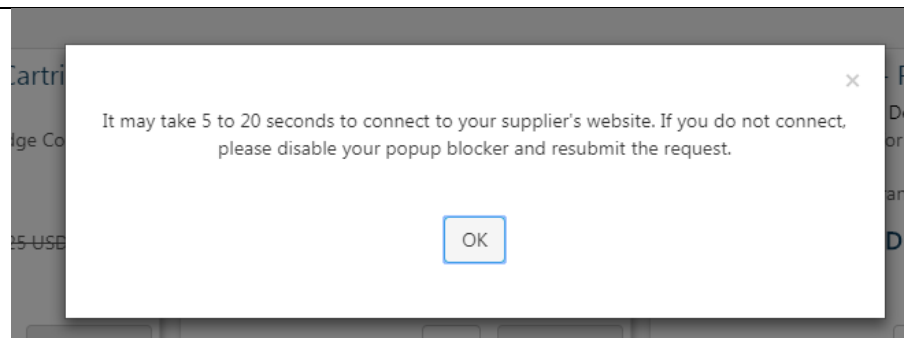
Punch-Out Catalog Definition	Hosted Catalog Definition
<ul style="list-style-type: none"> • Supplier manages own site/updates items & prices continuously • Most national Suppliers • Dynamic link, electronic connection from supplier with full catalog • Shop within Supplier site, but still remain connected to the ESM site • Supplier receives order at ordering info center • Seamless 	<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

Example Purchases

Example 1—Punch Out Catalog Order



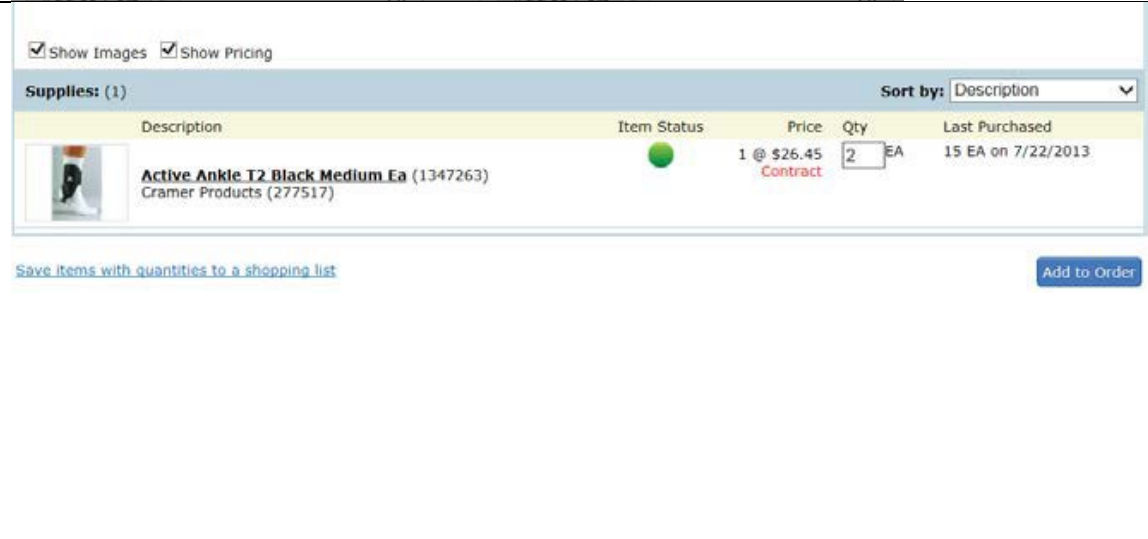
You will see this message. Press OK or wait.



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

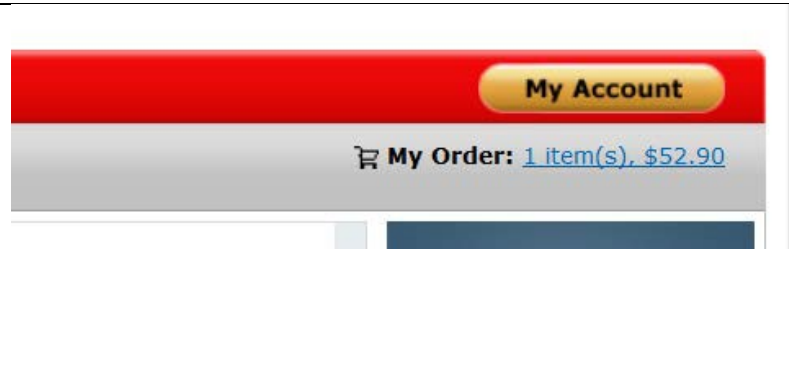
Press: **Add to Order** or supplier's terminology for adding items.

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



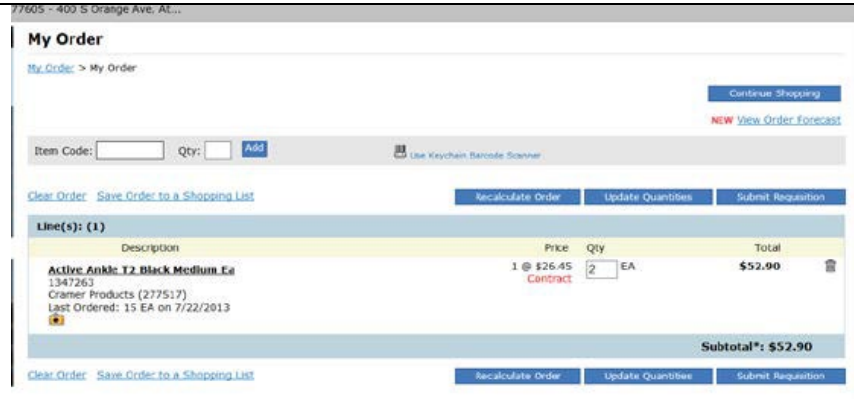
Press the **My Order** link (or Supplier's terminology for Shopping Cart).

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.



Item Summary (1 Items)				Cart Summary	
Item Details		Quantity	Price (USD)	Subtotal (USD)	
	Active Ankle T2 Black Medium Ea By: Henry Schein Inc. Catalog Item #: 1347263 Mfg/Provider: NA	2	26.45 / Each	52.90	

Total Items in Cart:	2
Number of Suppliers:	1
Cart Total (USD):	52.90
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**.

Checkout

- General Details [Change](#)
- Delivery Details Attn: Adrienne Cianfarini Location: School Building 1 [Change](#)
- Billing Details Attn: Dean Location: Administrative Building [Change](#)
- GL Details [Change](#)

Line Item Details (Total: 1)

Item Details	Quantity	Contract Price	Subtotal	Tax	S & H	Item Total (USD)	
1 Active Ankle T2 Black Medium Ea	2	26.45 / Each	52.90	0.00	0.00	52.90	more... x

Notes and Attachments: Internal Note External Note

Workflow Details [Change](#)

Forward **Request Approval**

General Details

Payment Form: Credit Card PO

Release Method: Manual

Order Type: Standard

Purchase Order #: 138

Transaction Summary

Transaction #: 101044

Create Date: 04/24/2018

Supplier: Henry Schein Inc.

Requester: Adrienne Cianfarini

Line Item Details (Total: 1)

Workflow Details

Prepare CC Order

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

Enter your credit card number.

Press **Continue**.

credit card order



Henry Schein Inc.
138 Dunwoody Road
Melville, NY 11747
United States
Attn: Judy Bennett
Phone: (631) 840-8919

Date: 7/7/2015
Purchase Order #: 1004
Transaction #: 25154
Requested By: Ruth C. Carrington, Bkg 70
Requester Email: rcarrington@pp.edu
Phone: 909994264
Authorized By: Ruth C. Carrington, Bkg 70

Ship To
Campus Marketplace
Cal Poly Pomona, VISA ORDER
California State Polytechnic University,
Pomona
3501 West Temple Avenue
Pomona, CA 91768
United States
Attn: Ruth C. Carrington, Bkg 70
Phone: 909 309 7629

Bill To
Entity Name: Campus Marketplace
Name on Card: Ruth C. Carrington, Bkg 70
Contact Phone Number: 909994264
Card Type: Visa
Card #:
Expiration Date: MM / 2015

Order Comments:

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 P-Card reconciliation. You must submit the supplier's itemized receipt or invoice.**

Item #	Description	UOM	QTY	U
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Submit Order - easyPurchase - Training

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Example 2 –Hosted Catalog Order

Select a hosted Catalog.

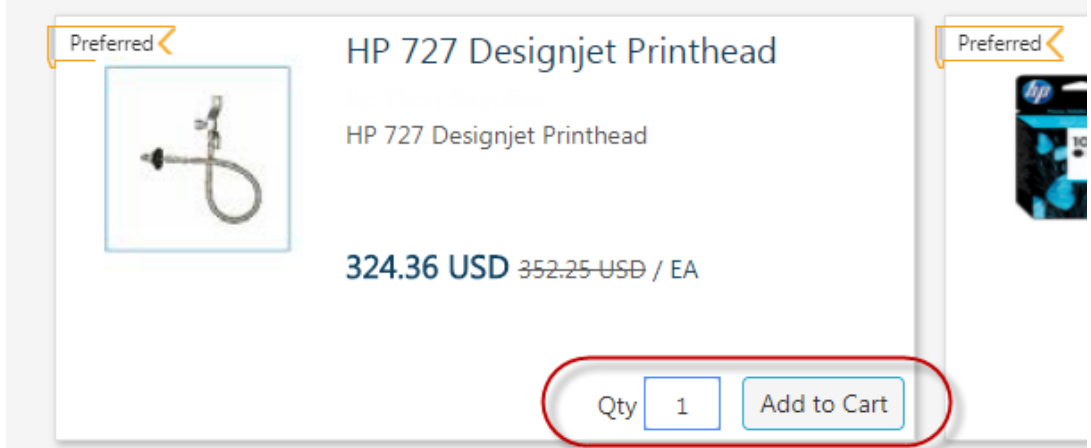
Note: You can tell, which catalogs are Hosted on the Shop Page. They do not have the catalog type listed.



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

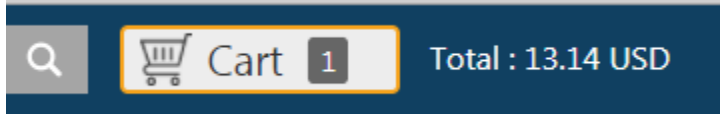
Note, the quantity defaults to 1 as soon as you click on it.

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



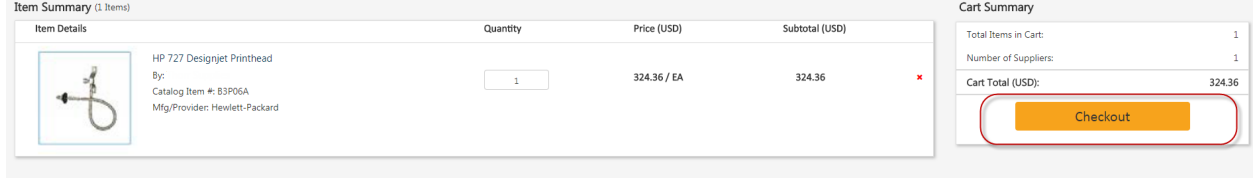
Press Add to Cart.

There is 1 item in cart.



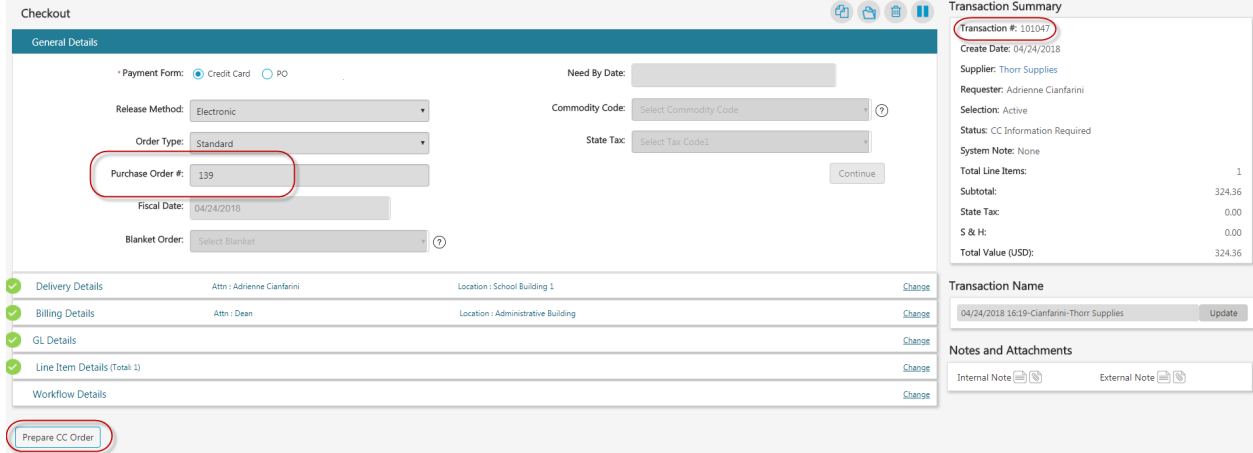
Press the **Cart** button to view item(s)

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**.

Romona, CA 91768
United States
Attn: Ruth Carrington
Phone: 909-869-3349

Bill To

Entity Name: Campus Marketplace

* Name on Card: Ruth Carrington

* Contact Phone Number: 9098694384

* Card Type: Visa

* Card #: *****

* Expiration Date: May 2016

Order Comments:

Continue

Print

Cancel

Item #	Description	UOM	QTY	Unit Price	Line Total
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Press **Place Order**.

Submit Order - easyPurchase - Training

This action will result in the order being transmitted to the supplier.

Are you sure you wish to continue?

Place Order

Cancel

Order status is now **Submitted to Supplier**.

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

You will receive a confirmation email from ESM.

Airgas
 Mid America Region
 2950 Industrial Drive
 Bowling Green, KY 42101
 United States
 Attn: Airgas Training Contact
 Phone: (270) 842-9489

Date: 7/7/2015
 Purchase Order #: 1002
 Transaction #: 25115
 Requested By: Ruth E Carrington, Bldg 75
 Requester Email: recarrington@cpp.edu
 Phone: 9098694384
 Authorized By: Ruth E Carrington, Bldg 75

Ship To
 Campus Marketplace
 Cal Poly Pomona, VISA ORDER
 California State Polytechnic University,
 Pomona
 3601 West Temple Avenue
 Pomona, CA 91768
 United States
 Attn: Ruth E Carrington, Bldg 75
 Phone: 909 869 7659

Bill To
 Entity Name: Campus Marketplace
 * Name on Card: Ruth E Carrington, Bldg 75
 * Contact Phone Number: 9098694384
 * Card Type: Visa
 * Card #:
 * Expiration Date: Mar 2016

Continue
 Print
 Cancel

Order Comments:

Item #	Description	UOM	QTY	Unit Price	Line Total
Y151MBH296	Airgas 1 Cylinder Brass Manifold Protocol Station With 3000 PSI Maximum Rated Inlet Pressure, CGA-296 Ship To Attn: Ruth E Carrington, Bldg 75	each	1	450.00 USD	450.00 USD
Subtotal:					450.00 USD

Example 3 –Catalog order to multiple Suppliers

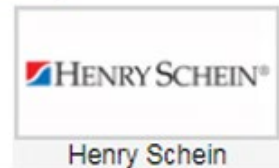
From the Shop Page, Select the first **Catalog** you want to order from. Put the item(s) in your Marketplace cart by following the instructions for the catalog type (punch-out or hosted).

General

Punchout



Punchout



Facilities

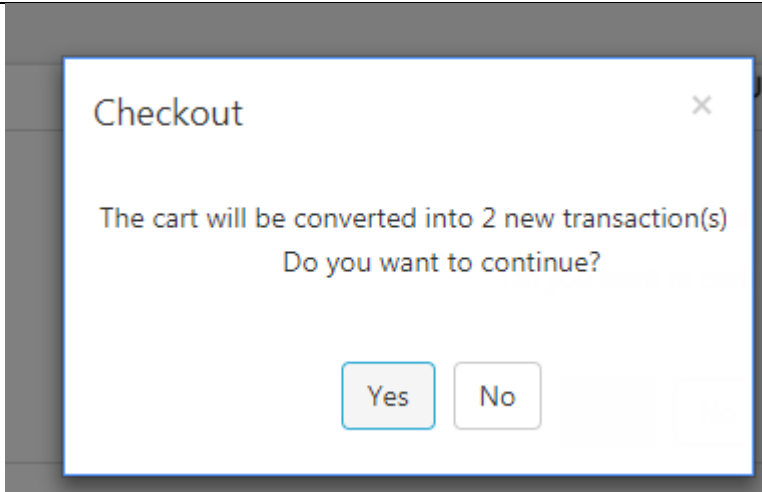


The items from both catalogs are now in your cart.

Click on **Cart**.

Cart **6**
Total : 749.44 USD

Select Checkout and confirm the conversion of multiple carts.



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**

The screenshot shows the "All Transactions" page in the eSM system. The page header includes a navigation bar with "Shop", "Approve (0)", "Receive", and "Invoice". A search bar is present, and the current cart status is shown as "Cart 0" with a total of "0.00 USD". The main content area displays a list of transactions under the heading "Pending Transaction(s)". There are 4 transactions from the recent cart, each with a "New" badge and a "Pending Release" button. The transactions are:

Transaction #	Supplier	Total Line Items	Total Value	Create Date	Requester	Status
02/22/2018 15:16-Cianfarini-AC Books Transaction #: 9573	AC Books	1	69.36 USD	02/22/2018	Adrienne Cianfarini	Unsubmitted Transaction
02/27/2018 08:24-Cianfarini-Office Depot PDME (D... Transaction #: 96089	Office Depot PDME (Demo)	1	39.42 USD	02/27/2018	Adrienne Cianfarini	Unsubmitted Transaction
04/24/2018 16:47-Cianfarini-Henry Schein Inc. Transaction #: 101056	Henry Schein Inc.	2	52.90 USD	04/24/2018	Adrienne Cianfarini	Unsubmitted Transaction
04/24/2018 16:47-Cianfarini-Thorr Supplies Transaction #: 101057	Thorr Supplies	1	648.72 USD	04/24/2018	Adrienne Cianfarini	Unsubmitted Transaction

Below these are 18 other pending transactions, including:

Transaction #	Supplier	Total Line Items	Total Value	Create Date	Requester	Status
COPY - 08/05/2015-08:39-Cianfarini-AC Books Transaction #: 27431	AC Books	1	100,000.00 USD	08/05/2015	Adrienne Cianfarini	Pending Release
09/09/2015-13:08-Cianfarini-Test Supplier for Deact... Transaction #: 29153	Test Supplier for Template name change	1	1.00 USD	09/09/2015	Adrienne Cianfarini	Pending Release
test for adding additional non-catalog item after rej... Transaction #: 31166	AC Books	4	71.60 USD	10/08/2015	Adrienne Cianfarini	Approval Rejected
01/20/2016-16:33-Cianfarini-AC Books Transaction #: 36231	AC Books	2	55.94 USD	01/20/2016	Adrienne Cianfarini	Pending Release

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



Glidden Professional Paints
15885 West Sprague Road
Strongsville, OH 44136
United States
Attn: Sean Gillespie
Phone: 404-798-0436

Date: 7/7/2015
Purchase Order #: 1005
Transaction #: 25136
Requested By: Ruth E Carris
Requester Email: recarringtonj
Phone: 9098694384
Authorized By: Ruth E Carris

Ship To
Campus Marketplace
Cal Poly Pomona, VISA ORDER
California State Polytechnic University,
Pomona
3801 West Temple Avenue
Pomona, CA 91768
United States
Attn: Ruth E Carrington, Bldg 75
Phone: 909 869 7659

Bill To
Entity Name: Campus Marketplace
* Name on Card: Ruth E Carrington, Bldg 75
* Contact Phone Number: 9098694384
* Card Type: Visa

Press **Place Order.**

Feb 2015

Submit Order - easyPurchase - Training

Description	Unit	Price	Line
Orange Fine Po	SD	24.50	
Round Stic	SD	10.00	
		Total:	34.50
		TAX:	0.00
		S&H:	0.00
		Total:	34.50

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

Place Order **Cancel**

familiarity with California State University (CSU) General Provisions for Commodity and Service Acquisitions. These are available on the Internet at www.calstate.edu/csp/crfi/GP/GP.shtml. Delay in Shipment: if you cannot fill this order without delay, please advise the Purchasing Office immediately of the probable delivery date. Changes: No change or modification in terms, quantities or

You will be taken back to the Shop Page.

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

Search Keyword(s), Item Numbers, etc.

Go to : All Transactions | Non-Catalog Items |

Products

Transfer Cart Ordering

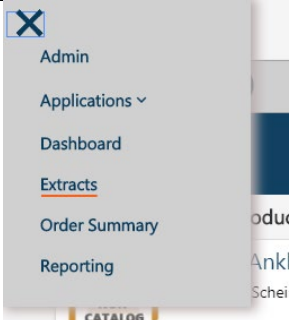
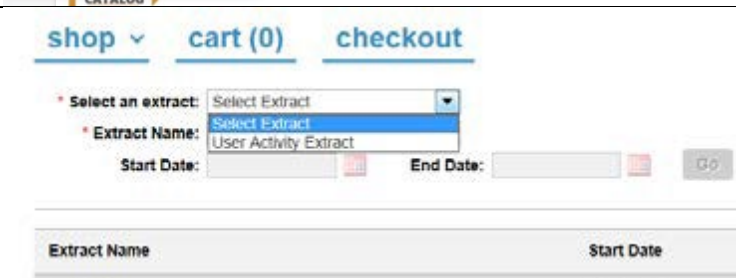
This process is for Credit Card holders who are designated as "Submitters" to place orders for non-P-Card holders.

<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 P-Card.</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@cpp.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.

Menu>Extracts	 A screenshot of a web application's navigation menu. The menu is open, showing options: Admin, Applications, Dashboard, Extracts (highlighted with a red underline), Order Summary, and Reporting. A 'CATALOG' button is visible at the bottom of the menu.
Select a User Activity Extract.	 A screenshot of the 'Select an extract' form in the application. The form has a header with 'shop', 'cart (0)', and 'checkout' links. Below the header, there are two dropdown menus: 'Select an extract:' and 'Extract Name:'. The 'Extract Name' dropdown is open, showing 'User Activity Extract' as the selected option. There are also input fields for 'Start Date:' and 'End Date:', and a 'Go' button.

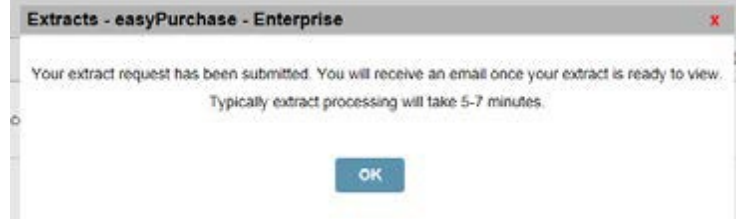
Enter an Extract Name.
Enter a date range.
Press Go.

* **Select an extract:** Entity Activity Extract

* **Extract Name:** Activity Extract 7 15 14

* **Start Date:** 07/01/2014 * **End Date:** 07/15/2014 **Go**

This message will appear.
Press OK



The Extract Name will appear in the list of Extracts.
Press Refresh periodically until the name highlights.

* **Select an extract:** Entity Activity Extract

* **Extract Name:** Enter Name for Extract

* **Start Date:** 07/17/2014 * **End Date:** 07/15/2014 **Go**

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 15:05	
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

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.

ESM Solutions - easyPurchase - User Activity Extract

Requesting Campus Marketplace

Requestor Ruth Carrington

Run Date: #####

Date Rang 8/1/2014

Date Rang 8/7/2014

User Name	User Email	Transaction ID	Status	Transaction Order Number	Create Date	Order Type	Supplier	Supplier ID	Catalog Number	Preferred Supplier	Supplier Price
Ruth Carrington	recarringt	74933	Unsubmitted	08/04/2014-10:39-Ca	8/4/2014		Grainger		Grainger	N	100
Ruth Carrington	recarringt	74947	No Workfl	08/04/2014-11:09-Ca	8/4/2014		B&H Photo Video		B&H Photo	N	420
Ruth Carrington	recarringt	75055	Unsubmitted	08/04/2014-13:52-Ca	8/4/2014		Complete Book & Me		Complete	N	1200

Extract will open in Excel.