WESTERN *Marketplace*

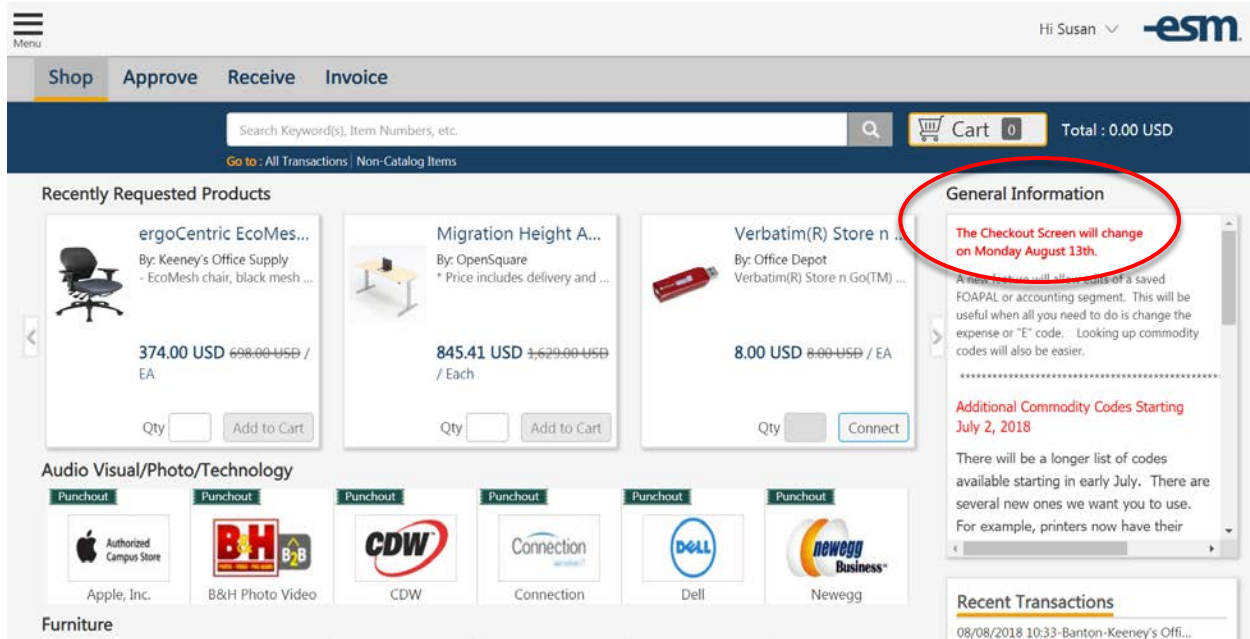# Getting Started: Catalog Shopping

Getting Access

You must be set up as a user in order to shop online. If in doubt, complete a Marketplace access form

Logging On

- Log on to My Western. There is a link under Technology Tools and there is a link on the Gateway to eProcurement website under Business Services.   This same website has many other helpful things: FAQ's, Return Guidelines and copies of the reference materials which may be viewed online or downloaded. These documents are updated often. Gateway to eProcurement Business Services

- Ensure your Pop-Up Blockers **are turned off** or the Marketplace has been set up in your browser as a trusted site. Check with your department IT contact for guidance on this.

- ATUS recommends Chrome and for Apple users, Safari for OS X be used.

Landing Page

Announcements will appear under General Information.

- Under Menu (the hamburger, top left) there are drop-down menus available for "Extracts" "Order Summary" and "Reporting."
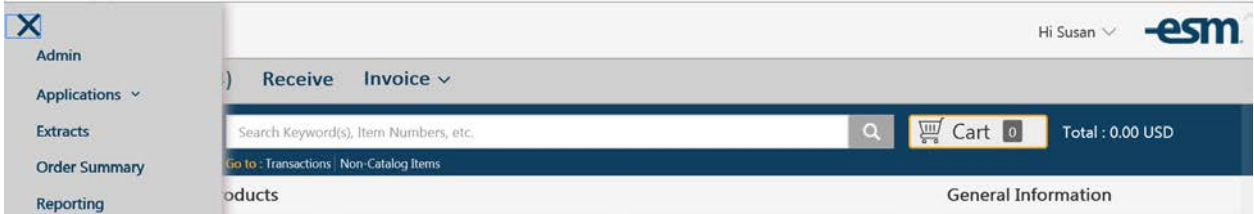
On the right hand side of the screen under your name you may logout, access your profile where you may assign an approver delegate for any lengthy absences from campus and you may reach the ESM Solutions (vendor provided, not WWU specific) help screens.
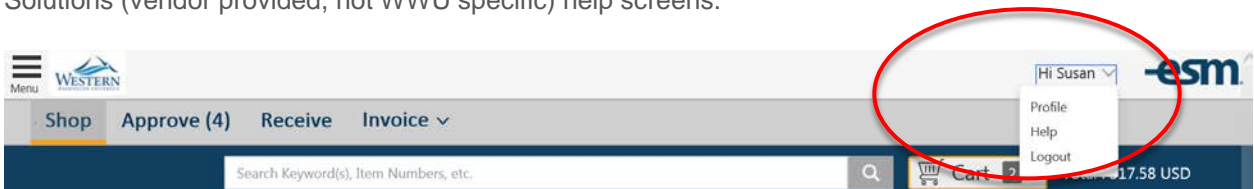
Pending Transactions

If you have open, rejected (returned) or unfinished transactions there will be a Pending Transactions flag on the top right of the screen. If you click it you will get a list of transactions with their status.

You may click the transaction name and the checkout screen will appear with the order details.

To check for additional information on the specific order once you get to the order consult Status and Click System Note. If that does not provide enough information consult the internal WWU note. Anytime there is a comment on the order the note icon turns blue.

Shop Tab

To move between the different areas such as Shop, Approve, Receive, you click the tab.

To see all recent transactions click All Transactions. To place a Non-Catalog order, click Non-Catalog items.

You may always see the contents your Western Marketplace cart by clicking "Cart."

Search Area

- Entering keywords or item numbers may not bring up all items that are available for purchase on the Marketplace. It will bring up items from "Hosted" catalogs, and it will bring up items from some punch-out catalogs where the vendor is able to provide advanced search (aka Level 2) functionality. Not all vendors are able to provide this advanced search functionality. If an item does not come up from this search area, punch-out to the vendor catalog and perform your search.

- When searching from this area, pricing should always be verified by clicking the "Connect" button.

- You may always search by going into each individual vendor catalog.

Recently Requested Products

- Recently Requested Products will reflect the last 10 hosted, level 2 punch-out or non-catalog items that were converted to transactions.
- Some Level 1 punch-out items may not be display in the Recently Requested section since updated pricing needs can't be displayed without accessing the supplier website first.

Shopping

- If there are more than six vendor catalogs assigned to a product category an arrow will appear which will allow you to the scroll and see the additional catalogs.

- For catalog shopping, select a vendor (Logo) to access vendor's website and shop. *A hyperlink below the Vendor logo is for entering non-catalog order for items that are not on the vendor catalogs.* Many punchout vendors do not allow for non-catalog orders, instead they load a special quote for you inside the punchout site. Questions about handling special orders, consult purchasing.

- After shopping on the vendor's website, y**ou will check out from the supplier's website**. This brings your items back into the Western Marketplace cart.

- **Each vendor's site uses different check out screens and wording** but when you punch-out to the vendor's website through the Marketplace the vendor's check-out, submit request process screens will bring your items back to the Western Marketplace cart.

- If you have any questions about a specific site call purchasing.

- If you wish to continue shopping, select the shop tab and continue to add items to your cart from other vendors.

- To see items in your cart at any time you may click cart.

- When shopping is complete, *click the checkout button in* the cart Summary area.

    Cart Summary/Transactions

- Once you are in Cart Summary you may add quantities or delete line items in the cart tab. Use the **"Red X"** to delete a line.

- Once you are ready to proceed, Click continue and the system will automatically set up each vendor's order as a separate transaction and move the order to the Checkout area.

Go to the Quick Reference for the New Checkout Screen to continue.

Contacts and Information:

Completing the Marketplace Order/ Order Status/ Questions or where do I buy something?

Call **Business Services/Purchasing at x3340 or x6341**

Account Codes: Consult your Department or Division Budget expert or call Diane Hack, Acctg Svcs (x3040.) You may also click here Expense Codes

- **Commodity Codes:** There is a list available online here: Reference Guides
- **Vendor returns** see: Vendor Return Policies
- There is a Frequently asked Question Guide available online here :   FAQ's
- If you have questions about **cancelling an order or the status of an order** call the specific Vendor.   Many of the vendors have contact information available on their Punch-out catalog sites.   You may also email Purchasing@wwu.edu or call Purchasing.
- If you have questions about **receiving** online, call or email Purchasing (X3340 or x6341) Purchasing@wwu.edu
- If you have questions about invoices or open encumbrances call Accounts Payable, x6477 or email Accounts.Payable@wwu.edu

System Issues: Call (x2430) or email WWU ESM support ESM.support@wwu.edu for the following items:

- Log On Issues/ User Set-up and Roles
- No Workflow available or Workflow changes

For **Payment information** on Marketplace orders, call Accounts Payable (X2490) or email **Accounts.Payable@wwu.edu**