Campus Marketplace

User Guide for ProCard Holders
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Campus Marketplace Overview
San José State University is one of the 14 campuses using Campus Marketplace. Campus Marketplace is a collection of supplier catalogs with CSU contracted pricing and it is maintained through a web-based portal “ESM Campus Marketplace”.

Login to Campus Marketplace
Use your SJSUOne account to log into system.

1. To login to Campus Marketplace, go to https://eprocurement.esmsolutions.com:443/Shibboleth.sso/Login?id=https%3a%2f%2fidp.cpp.edu%2fidp%2fshibboleth

The InCommon page displays.

2. Select San Jose State University from the drop down.

3. Click Next.
4. Enter your SJSUOne ID and password.
5. Click **Log In**.

Campus Marketplace page displays.
Shopping Overview

As a ProCard holder, you will have the ability to shop and place orders. In addition, a ProCard holder may be designated as a “Submitter” for specific non-ProCard holders and may process orders from a Transferred Cart.

It is important to note that ProCard guidelines apply to Campus Marketplace. If the purchase exceeds ProCard limits or is not allowed at all on the ProCard, you can still use Campus Marketplace to obtain suppliers and CSU contract prices, but you will need to refer to Procurement Pathways for an alternate purchasing process to follow.

On the main Campus Marketplace page, there are four main components:

1. The Campus Marketplace banner with all the participating campuses.

2. The Information Box in the left hand column which contains general information shared by all campuses - including a link to the Administrators’ contact information.

3. The Search fields allows you to select a supplier’s catalog or locate item by keywords, item numbers, and etc.

   **Note**: Searching by keyword is not available for PunchOut catalogs.

4. The Catalog Box contains logos from all current supplier catalogs. You can click on a logo to open a catalog.
Catalog Types
There are two types of catalogs.

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

Example Purchases

Example 1 - PunchOut Catalog Order

*Important*: Turn off web browser’s pop-up blocker.

1. From the Campus Marketplace Shop page, make catalog selection from dropdown menu and click PunchOut button.

or

click supplier’s logo in the Catalog Box section. The logos do not identify if catalog is a Punchout.
The Punchout- easyPurchase panel displays.

2. Press **OK or wait.**

Supplier’s catalog will display in new window.

3. Once the catalog loads, **select the item(s) to order** by entering the quantity.

4. Press **Add to Order** or supplier’s terminology to add items to cart.

5. Press **My Order** or supplier’s terminology to view items in cart.
If **My Order** or supplier’s terminology is selected, the page displays.

6. Review item(s) and when ready, press **Submit Requisition** or supplier’s terminology.

The supplier’s punchout catalog window will close.

7. Return to Campus Marketplace to complete purchase.

8. In Campus Marketplace, click **Cart** to view item(s).
Cart displays.

9. Review item(s) and press:
   - **Update** if quantity was modified
   - **Delete** to remove item from cart.
   - **Continue** to checkout.

   ![Cart display](image)

   **If Continue** was selected, the **Transaction(s) Validation-easyPurchase** panel displays.

10. Click **OK** to continue.

   ![Transaction validation panel](image)
The **Checkout** screen displays transaction(s).

In the Transaction Header:

11. On the left side of header, click the number with small triangle to collapse/uncollapse header and view items within transaction.

12. **Transaction #:** System assigned number used for tracking purpose.

13. These fields displays-
   
   **Supplier:** Name of merchant/catalog.

   **Total Line Items:**  
   Number of items ordered within the transaction.

   **Total Value:** Total of transaction; includes cost of items, tax and/or shipping and handling.
14. **Ship To – Attn:** Confirm the “Ship To-Attn” name for the transaction. The field defaults to the Submitter’s (ProCard holder) name and delivery location.

   or

   if the items are from a transferred cart, it will display the cart originator’s name and delivery location.

   This field can be changed if the Submitter (ProCard holder) or the requester is employed in multiple departments.

   If this field is modified, enter location as follows: First Name, Last Name, colon, Full Building Name, and Room Number. Example - Joe Smith: Clark Hall 500

   If field is modified, click **Update** button.

15. **Tax:** Select 8.75%, the city and county tax rate for San Jose.

   For Moss Landing, select 7.63%

16. **Status:** Displays the transaction status.

   **Important:** Do not leave unsubmitted orders in the system as the next time you checkout, these will be included and transmitted with the order. Be sure to either complete checkout or
delete if transaction is not needed from checkout.

To review item(s) in a transaction.

17. On the left side of Transaction Header, click the number with arrow to collapse the header.

Transaction details display.

18. Review item(s) in transaction and press:

- **Update** if quantity was modified
- **Delete** to remove item from transaction.

**Note:** In order to delete entire transaction, you will need to delete each item in it.

- **Press Prepare** to finalize checkout.
If **Prepare** is pressed, the **Credit Card Order** page displays.

Information displayed on this panel includes ship to location and item(s) ordered, and total.

19. In **Bill To** section, enter your ProCard credit card.

20. Press:

   - **Cancel** to exit Credit Card Order page. Payment is not processed.

   **Note:** Transaction will remain as an unsubmitted transaction in Checkout. To completely remove transaction, items in it will need to be deleted.

   - **Print** to print page.

   - **Continue** to go to place order.

If **Continue** is pressed, **Submit Order –easyPurchase-Training** displays.

21. Press **Place Order** to submit purchase request.
Order is now submitted to supplier.

You can print the order for your records, optional. You will receive a confirmation email from ESM and supplier.

**Important!** This order document cannot be used for ProCard reconciliation. You must submit the supplier’s itemized receipt or invoice.

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**Example 2 - Hosted Catalog Order**

**Important:** Turn off web browser’s pop-up blocker.

1. From the Campus Marketplace Shop page, make catalog selection from dropdown menu and click Go button.

   or

   click supplier’s logo in the Catalog Box section. The logos do not identify if catalog is Hosted.
Items from the selected Catalog displays.

2. Enter quantity for each item you want to order.

   **Note**: The quantity defaults to 1 as soon as you click in field. Override if necessary.

3. The Add to Cart button will highlight. Press the **Add to Cart** button to item to cart.

4. Click **Cart** to view item(s).

   Cart displays.

5. Review order and press:
   - **Update** if quantity was modified.
   - **Delete** to remove item from cart.
   - **Continue** to go to Checkout.
If **Continue** was pressed, the **Checkout** screen displays.

In the **Transaction Header**:

6. On the left side of header, click the number with small triangle to collapse header and view items within transaction.

7. **Transaction #**: System assigned number used for tracking purpose.

8. These fields display:
   - **Supplier**: Name of merchant/catalog.
   - **Total Line Items**: Number of items ordered within the transaction.
   - **Total Value**: Total of transaction; includes cost of items, tax and/or shipping and handling.
9. **Ship To – Attn:** Confirm the "Ship To-Attn" name for the transaction. The field defaults to the Submitter’s (ProCard holder) name and delivery location.

or

if the items are from a transferred cart, it will display the cart originator’s name and delivery location.

This field can be changed if the Submitter (ProCard holder) or the requester is employed in multiple departments.

If this field is modified, enter location as follows: First Name, Last Name, colon, Full Building Name, and Room Number. Example: Joe Smith: Clark Hall 500

If field is modified, click **Update** button.

10. **Tax:** Select 8.75%, the city and county tax rate for San Jose.

For Moss Landing, select 7.63%

11. **Status:** Displays the transaction status.

**Important:** Do not leave unsubmitted orders in the system as the next time you checkout, these will be included and transmitted with the order. Be sure to either
12. On the left side of Transaction Header, click the number with arrow to collapse the header.

Transaction details display.

13. Review item(s) in transaction and press:

- **Update** if quantity was modified

- **Delete** to remove item from transaction.

**Note:** In order to delete entire transaction, you will need to delete each item in it.

- **Prepare** to finalize checkout.
The Credit Card Order page. Information displayed on this page includes list of item(s) being ordered and delivery location.

14. In Bill To section, enter your ProCard credit card.

15. Press:

- **Cancel** to exit Credit Card Order page. Payment is not processed.

  **Note:** This will not remove transaction from Checkout.

- **Print** to print page.

- **Continue** to go to place order.

If **Continue** was pressed, Submit Order- easyPurchase window displays.

15. 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 and supplier.

**Important!** This order document cannot be used for ProCard reconciliation. You must submit the supplier’s itemized receipt or invoice.

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**Example 3 - Catalog Orders to Multiple Suppliers**

You can shop and add items from multiple suppliers to cart in Campus Marketplace.

**Important:** Turn off web browser’s pop-up blocker.

1. From the Campus Marketplace Shop page, make catalog selection from dropdown menu and click **Go** or **Punchout** button.

*or*

click supplier’s logo in the **Catalog Box** section. The logos do not identify if catalog is Hosted or Punchout.
2. Put the item(s) in your Marketplace cart by following the instructions for the catalog type (Punchout or Hosted).

3. Select items from a catalog and press **Add to Cart**.

4. In Campus Marketplace, items from supplier can be found in Cart.
5. Make selection of next catalog to order from in the Campus Marketplace Shop page by picking catalog from the dropdown menu and press Go or Punchout or click the supplier’s logo from the Catalog Box.

6. Put the item(s) in your cart by following the instructions for the catalog type (Punchout or Hosted).

7. Enter the Quantity for selected item.

8. Press Add to Cart.

9. In Campus Marketplace, click Cart to view items.
Cart displays.

Supplier’s name can be found in each item in list.

10. Review order and press:

- **Update** if quantity was modified.
- **Delete** to remove item from cart.
- **Continue** to go to Checkout.

If **Continue** was pressed, the **Transactions(s) Validation-easyPurchase** window displays.

11. Click **OK**.
The **Checkout** screen displays.

Each supplier’s catalog ordered will have a Transaction Header.

The Transaction Header will display the following:

12. Click the number with small triangle to collapse a header and view items within transaction.

13. **Transaction #:** System assigned number used for tracking purpose.

14. These fields display-

   **Supplier:** Name of merchant/catalog.

   **Total Line Items:** Number of items ordered within the transaction.

   **Total Value:** Total of transaction; includes cost of items, tax and/or shipping and handling.
15. **Ship To – Attn**: Confirm the “Ship To-Attn” name for the transaction. The field defaults to the Submitter’s (ProCard holder) name and delivery location.

Or

if the items are from a transferred cart, it will display the cart originator’s name and delivery location.

This field can be changed if the Submitter (ProCard holder) or the requester is employed in multiple departments.

If this field is modified, enter location as follows: First Name, Last Name, colon, Full Building Name, and Room Number. Example - **Joe Smith: Clark Hall 500**

If field is modified, click **Update** button.

16. **Tax**: Select 8.75%, the city and county tax rate for San Jose.

For Moss Landing, select 7.63%

17. **Status**: Displays the transaction status. This field will change through the checkout process.

**Important**: Do not leave unsubmitted orders in the system as the next time you checkout, these will be included and
transmitted with the order. Be sure to either complete checkout or delete if transaction is not needed from checkout.

 Collapse a Transaction Header to display transaction details.

18. Review item(s) in transaction and press:

- **Update** if quantity was modified
- **Delete** to remove item from transaction.

**Note**: In order to delete entire transaction, you will need to delete each item in it.

- **Prepare** to finalize checkout.

19. Repeat steps for next Transaction Header.
If Prepare is pressed, the Credit Card Order page displays.

Information displayed on this panel includes ship to location and item(s) ordered, and total.

20. In Bill To section, enter your ProCard credit card information.

21. Press:
   - **Cancel** to exit Credit Card Order page. Payment is not processed.
   - **Print** to print page.
   - **Continue** to go to place order.

Note: Transaction will remain as an unsubmitted transaction in Checkout. To completely remove transaction, items in it will need to be deleted.

If Continue was pressed, Submit Order- easyPurchase window displays.

22. Press **Place Order**.
You will be returned back to **Checkout**.

23. **Repeat** process to order from remaining supplier(s).

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**Transfer Cart Ordering**

This process is for ProCard holders who have been designated as “Submitters” by non-ProCard holders to place orders on their behalf.

1. ProCard holder will receive an email advising there is a transaction pending your review and action.

2. The item(s) will be in your **Cart**. Review the transactions and make any necessary changes.

3. Complete the transaction by using your ProCard.

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**Order History**

ProCard holders can retrieve past Campus Marketplace orders.

From the main Campus Marketplace page:

1. Navigate to **Menu** at the top of page.

2. Select **Order Summary** from the drop down menu.
The **Order Summary** page displays.

3. Enter criteria to locate an order.

**Note:** It is recommended to use Transaction Number as the search criteria. Using other values will bring up matching transactions from all CSU campuses.

4. Click **Search**.

Results display.

4. Click the hyperlink for Transaction Number to view details.
5. Click View to go to **Credit Card Order** for transaction.

Credit Card Order displays.

6. Press:
   - Print to print page.
   - Close to close window.
Resources

- **Campus Marketplace**: For information and link to login.
  (http://www.sjsu.edu/finance/about_us/purchasing/campusmarketplace/)

- **ProCard Program**: For ProCard guidelines.
  (http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/index.html)

- **Procurement Pathways**: University processes to procure goods and services.
  (http://www.sjsu.edu/finance/financeconnect/resources/pathways/)

Contact

Please contact FinanceConnect with any questions about the process or your Campus Marketplace account at financeconnect@sjsu.edu or 4-1558.