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”.

This guide is for ProCard holders. Non-ProCard cardholders should refer to Campus Marketplace User Guide for Non-ProCard Holders for instructions to using this portal.

Request for Access

Access to Campus Marketplace or to update account, can be requested by completing the Campus Marketplace Access Request form. Training is not required to request access.

Log into Campus Marketplace

Use your SJSUOne account to log into the system.

1. From the Campus Marketplace pathway webpage, click the Campus Marketplace button.
The CSYou Campus Login page displays.

2. From the dropdown menu, select **San Jose**.

   *Tip: Hit the S key on keyboard five times for select San Jose.*

3. Click **Login** button.

   ![Campus Login Page](image1)

   **SJSU Single Sign-on page displays.**

4. Enter your SJSUOne ID (Employee ID) and password.

5. Click **Sign In**.

   ![SJSU Sign-in Page](image2)
CSYou Systemwide Campus Marketplace page displays.

6. Click link.

ESM Campus Marketplace Shop page displays.
Shopping Overview

Orders placed in ESM Campus Marketplace are paid for with the ProCard. 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, Campus Marketplace can still be used to obtain product information and CSU contract prices, but refer to Procurement Pathways for an alternate purchasing process to follow.

ProCard holders have the ability place items into their cart and pay transaction. In addition, ProCard holders can be designated as a “Submitter” by specific non-ProCard holders. Non-ProCard holders are able to transfer their cart to their designated ProCard holder to complete the order.

A. Shop Page

On the main Shop page, there are seven components:

1. The Search fields allows user to search by keywords, item numbers, and etc.

2. Cart displays number of items and the purchase total in it. Click the Cart to view list of items.

3. All Transactions displays complete list of transactions.
   
   **Note:** Non-Catalog Items is not used.

4. Recently Requested Products displays last few items viewed.

5. The General Information in the right hand column contains general information shared by all campuses - including a link to the Administrators’ contact information.
6. **Supplier Catalog** section displays the suppliers’ logos. They are organized by product or field categories.

Click on a logo or scroll through list to locate and view a supplier’s catalog.

7. **Recent Transactions** display unsubmitted/submitted orders.

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**B. Catalogs**

All supplier catalogs in Campus Marketplace are PunchOut catalogs. This means:

- 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
Create an Order

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

A. Select an Item from Supplier Catalog

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

1. From the Campus Marketplace Shop page, click on a supplier's logo in the Suppliers' Catalog section.

Message connecting to supplier's catalog displays.

2. Press OK or wait.
New window opens and supplier’s catalog displays.

3. Use supplier’s catalog search or shop feature to locate a product.

4. When product is located, select the item to order by entering the quantity.

   **Note:** Field defaults to Quantity: 1, but it can be edited.

5. Press Add button or supplier’s terminology to add item to cart.
6. Click **Continue Shopping** to shop and add more items to Cart.

or

click **Review & Checkout** to view item(s) in cart and complete transaction.

*Note: Some suppliers have a minimum order limit before order can be processed by them.*

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**B. Review and Checkout**

1. From supplier's catalog main page, click the **Cart** icon or supplier's terminology to view items.
My Cart or supplier's terminology displays.

2. Review items in cart to:
   - edit quantity and click **Update Cart**
   - or
   - click **Remove** item as needed.

3. When ready, press **Submit Order** or supplier's terminology.

If Submit Order or supplier's terminology is selected, the supplier's PunchOut catalog window will close.

4. Return to Campus Marketplace to complete purchase.

5. In Campus Marketplace, click **Cart** icon to view item(s).
Cart Item Summary displays.

If shopping from multiple supplier catalogs, all items will be found in Cart.

Each item listed will reference:

- **Product description**
- **Supplier**
- **Catalog/Item #**
- **Quantity**
- **Price**
- **Subtotal**

6. Review item and

   - **Update Quantity** if needed by changing the number and click the **Update** button when it appears beneath the field.

   or

   - Click **×** to remove item from cart.
7. Use scroll tool to move up/down the list

8. Click **Checkout** to move to next step.

If Checkout is selected, the Checkout panel displays.

9. Click **Yes** to continue

    or

    **No** to return to Cart.

**Note:** *Cart will be converted into multiple transactions if ordering from more than one supplier.*

**IMPORTANT!** Once a transaction for supplier has been created, new items cannot be added to it.

A new order will need to be created for the additional items or delete transaction to start over.
The Checkout page displays the transaction.

Other features found on the Checkout page for transaction:

- **Archive**: Cancels the Transaction. Transactions that have been archived will remain in the system, but it cannot be edited or submitted to supplier.

- **Delete**: Permanently removes Transaction from system.

- **Hold**: Moves Transaction out of Checkout. Transactions placed on Hold will be found in All Transactions and can be processed when ready.
Transaction Summary provides the following information:

- Transaction number
- Create Date
- Supplier
- Requester name
- Transaction status
- Number of items
- Subtotal, tax, shipping/handling, and total

The transaction Checkout page contains the following sections:

- General Details
- Delivery Details
- Billing Details
- Line Item Details

10. Click Continue in a section to move to the next section.
11. Review each section to ensure information is correct and modify as need.

**Note:** Each section allows minimal changes. If a field, such as delivery location, cannot be edited, then update account by completing the Campus Marketplace Access online form.

12. In the Line Item Details section, review and update quantity of item as needed or click the ✗ to delete the items from transaction.

13. When ready, click **Submit** to proceed to next step.
Submit message displays.

14. Click Yes to continue
   or
   No to return to Checkout.

If Yes was selected, the Checkout page, with all sections collapsed, displays.

15. Click Prepare CC Order to continue.
Review Purchase Order – Credit Card page displays.

16. Review order as needed. This page shows:

- Order date
- Transaction number
- Requester information
- Supplier information
- Ship To
- Bill To
- Item description, quantity, and price
- Order total

17. When ready, click **Place Your Order** to continue or **Cancel** to return to Checkout and edit order.
If Place Your Order was selected, Credit Card Details page displays.

Note: ProCard information has to be entered each time an order is placed. Credit card information is not stored in the user’s account.

18. Enter your ProCard information.

19. Click Place Your Order to submit transaction to the supplier for processing

or

Cancel to return to Checkout and edit order.

Order is now submitted to supplier.

You can print the order for your records (optional).

The following email confirmations will be delivered to you:

- ESM Campus Marketplace confirming order has been submitted.
- Supplier confirming receipt of order.
- Supplier when goods are shipped with invoice for your record.

Repeat Review and Checkout steps 1 to 19 if there are more than one transaction.
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 notification that there is a transaction requiring review and action. Notification identifies the name of Requester, Transaction number, date and supplier.

2. The item(s) will be in your Cart. Refer to Review and Checkout, steps 1 to 19 for instructions to completing the order.

Order History

ProCard holders can retrieve past Campus Marketplace orders.

From the main Campus Marketplace page:

1. Click on the Menu icon at the top of page.

2. Select Order Summary from the menu.

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From: noreply@esmsolutions.com [mailto:noreply@esmsolutions.com]
Sent: Tuesday, September 30, 2014 9:15 AM
To: Amy Chan

Dear Amy,

Valorie Gale, CL 500 has created Transaction 13462 - 09/30/2014-09:15-Gale, CL 506-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 valorie.gale@sjsu.edu.
The **Order Summary** page displays.

3. Enter one or more criteria such as Requester name or Transaction Number to locate an order.

4. Click **Search**.

   Results display.

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

5. Click a Transaction Number hyperlink for view details.

   **Transaction Header displays.**
6. In the **Transaction Header**, click the number and arrow found to the left of Transaction # to expand section and display the items within transaction.

**transaction # displayed.**

7. Click **View** to open order details.
Credit Card displays with transaction order details.

8. Select one:
   - Print PDF
   - Print page.
   - Close

References

- **Campus Marketplace**  [Link](http://www.sjsu.edu/finance/about_us/purchasing/campusmarketplace/)
- **Campus Marketplace User Guide Non-ProCard Holders**  [Link](http://www.sjsu.edu/finance/docs/tut_campus_mkt_non-pcard.pdf)
- **ProCard Program**  [Link](http://www.sjsu.edu/finance/financeconnect/resources/pathways/procard/index.html)
- **Procurement Pathways**  [Link](http://www.sjsu.edu/finance/financeconnect/resources/pathways/)

Forms

- **Campus Marketplace Access Request**  [Link](https://docs.google.com/a/sjsu.edu/forms/d/e/1FAIpQLSfVMeHebii1puR1BIStkZ5lf7Fhuo8dXjgymc5cd-pu1QRnQ/viewform)

Contact

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