MERCURY COMMERCE

THE BASICS
Getting Started....

- Website www.mercurycommerce.com
- Click on “Login” and select “Customer Login”
Getting Started (cont.)...

• After you click “login”, you will be directed to the next page.
• Click on “Mercury Version”
Logging In...

• Next you will see the login page. To bypass the previous two steps, bookmark the web address to this webpage.

• You will need to know
  • Customer ID (012504670) each time
  • User Name (same as Colleague username)
  • Password (you will set after initial login, and will have to change every 60 days)

• Do not hit “enter” after each item, please only use the TAB key.

• You have only 3 attempts to login before it locks you out.

• If you forget your username/password, just give me a call x. 6703 or e-mail!
Login Webpage

User Login

To ensure that no one else accesses your account, you are required to login each time you access the application.
Please remember not to share your login information with others.

Login

Customer ID: [Enter Customer ID]
012504670

User Name: [Enter User Name]
garrism

Password: [Enter Password]

Remember Me

Login

Maintenance Scheduled

Begin: 9/2/2013 8:00 PM ET
End: 9/3/2013 12:00 PM ET

The system will be unavailable from Friday until Saturday for routine maintenance. Please contact us at Customer Support with any questions.

Thanks and have a great day!
What next?

• After you have successfully logged in, you will be directed to the opening page of your Mercury Commerce account.

• This webpage will show you
  • Activities that are waiting for your action
  • Will direct you to your requisition screen or approval screen (depending on user account), by clicking on “easypurchase” in the left hand column.

• Choose either step #1 or #2 to enter in the “easypurchase” site, i.e. where you will create the requisition.
  • In most cases you will be selecting #2.
Inside Mercury Commerce

Select a Solution from the list to begin.
Or, click an activity link below to access tasks available to process.

- easyPurchase - you have...
  - No activities to process.
Helpful tips!!

• HELPFUL TIPS!
  • Make sure you have money in the budget you wish to use, i.e. 10-62030-xxxx-xx. Mercury checks each line budget not your overall budget.
    • Please note: accounts beginning with 25/40/50 etc., will typically have the most difficulty. Shirley H. is working to assign money to individual budget lines in these particular areas.
  • If your vendor is not in Mercury, give me a call, it is very particular sometimes in how you type in the name of the vendor.
  • At this time, Mercury is unable to do half quantities and can only do whole numbers. They are currently working on this problem, but it has not been resolved.
Creating a requisition for Purchase Order or Check Request

• You should be at this screen:

To create a requisition, click on “New Requisition” on the right hand side of the screen.

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Creating a requisition for Purchase Order or Check Request (cont.)

• You can have two options:

  1. Click on the vendor dropdown box “Catalogs”
     a) Vendors located in the dropdown menu, are all on some kind of competitively bided contract (which = no extra quotes).
     b) Dynamic link: will send you to their website and you can shop like you normally would on a website.
     c) Those marked with “(EastCentral)” or nothing are listed items that are on our contract.
  2. Click on “Manual Item Entry”
     (You will always do this for check requests)
     a) You can use this for vendors not listed under the “Catalogs” link. Most vendors that we use are in Mercury. If not, let me know and I can put them in, it is a simple process.
Creating a requisition for Purchase Order or Check Request (cont.)

- **Manual Item Entry:**
  - You can search by Vendor Name, Number, or City & State
  - Click on “View” to see the options listed under the name you typed.
    - You can have to type in at least the first three letters on the vendor name.
  - If you want return to the previous screen click on “Return”.

![Search By Form]

![Vendor Name: ](input)

Or

![Vendor Number: ](input)

optional

![City: ](input)

![State / Province: ](input)
Creating a requisition for Purchase Order or Check Request (cont.)

- After selecting your Vendor, (Manual Item Entry), you will be at your requisition page.
- You will need to enter in the following items:
  - Description
  - Item number (if you have it)
  - Unit of Measure (Each, Pkg, etc.)
  - Price (per item)
  - Qty (number ordering)
- After each line item, click on “Update-Add Line”. Once finished with entering in items, click on “Submit”
Creating a requisition for Purchase Order or Check Request (cont.)

• After clicking on “Submit”, you will be directed to your final step of creating the requisition:
  • You need to fill in the following areas:
    • Requisition Name
    • Ship To Location (Defaults to Dock 1)
    • Approval Route
    • Needed By Date (if necessary)
    • Account #’s
    • Notes & Attachments (use for any quotes/invoices/notes)
    • Deliver To
    • Discount (if applied to each line)
    • Confirm request (ONLY FOR CHECK REQUESTS)
• Click on “SAVE” before “Submit for Approval”, this will update all items on your requisition and you can review for mistakes.
To separate account codes (budget #), you can click on “Account Code” for each line item and change automatically. In this function you can also split between budgets if you wish.

Notes & Attachments: Can be applied to the overall requisition or individual items. Just click on the Pencil or Paper Clip by each item or in the top portion.
Completed Requisition Example

- At this point you will be assigned a Requisition Number (in the upper left hand corner, in green)
What next?

- After submitting your requisition, several things will happen:
  - It will automatically check your budget against what Colleague has listed.
    - If you have money available, it will be sent on to your supervisor
    - If you have no money available or not enough to cover your requisition amount, it will be sent back with a maintenance required notice.
  - IF you have money, here is the approval process:
    - Your Supervisor
      - If it’s >$1,000, the VP over your division
    - Lark Hoffman, Financial Services
    - Shirley Hofstetter, Comptroller
    - Phil Pena, VP Finance & Administration, if it’s >$5,000
    - Melissa Popp, Purchasing
  - You can login to Mercury at any point to check the status and see who is next to approve your requisition
MERCURY WORKFLOW

- **Originator**
  - Approving Supervisor
  - Approving VP If >$1,000
  - Financial Services Lark
    - Comptroller Shirley
      - VP, Fin & Admin Phil >$5,000
        - Purchasing/Rec. Melissa
          - A/P Sharon
Mercury Online Requisitioning

- Originator creates requisitions
  - If requisition is a check request, you will select the confirming request at the top of the screen.
  - If requisition is a PO, you will not select this option.
  - The originator will also be able to attach any documentation to the requisition using the “Notes & Attachments” function.
- Requisition is then sent to your approving supervisor.
  - If your VP requires, the requisition will be sent to them if over a certain amount.
  - The requisition is then sent to the Business Office and follows this flow (please note that the requisition may be rejected at any point during the approval process):
    - Lark – Business Office Approval
    - Shirley – Comptroller
    - Phil – VP, Finance & Administration
Mercury Online Requisitioning cont.

• After all the approvals have been made, the requisition will then be sent to Purchasing.
• Purchasing will then turn each requisition into a Purchase Order.
• At this point, the purchase order will be either flagged as a PO or a Confirming PO.
  • If Confirming PO, it will be directly e-mailed to Purchasing and received. All received Confirming PO’s will be taken to A/P for a check to be generated.
  • If it is just a Purchase Order, Purchasing will disperse PO as required by the vendor.
Exceptions for Check Requests

- Travel and Expense Reimbursements
- UMB Visa Credit Card Purchases
General Purchasing Policy Reminder!

- 4.6 Purchasing Policy (pgs. 72-74)
- Summary:
  - Expenditures (4.6.2)
    - up to $1,000, no quotes necessary
    - More than $1,000 up to $5,000, at least (3) verbal price quotes
    - More than $5,000 up to $15,000, at least (3) written price quotes
    - Exceeding $15,000, must be competitive bided

- Purchasing (4.6.8)
  - All purchases must be authorized in advance by a requisition and/or purchase order signed by an appropriate college official.
THE END!