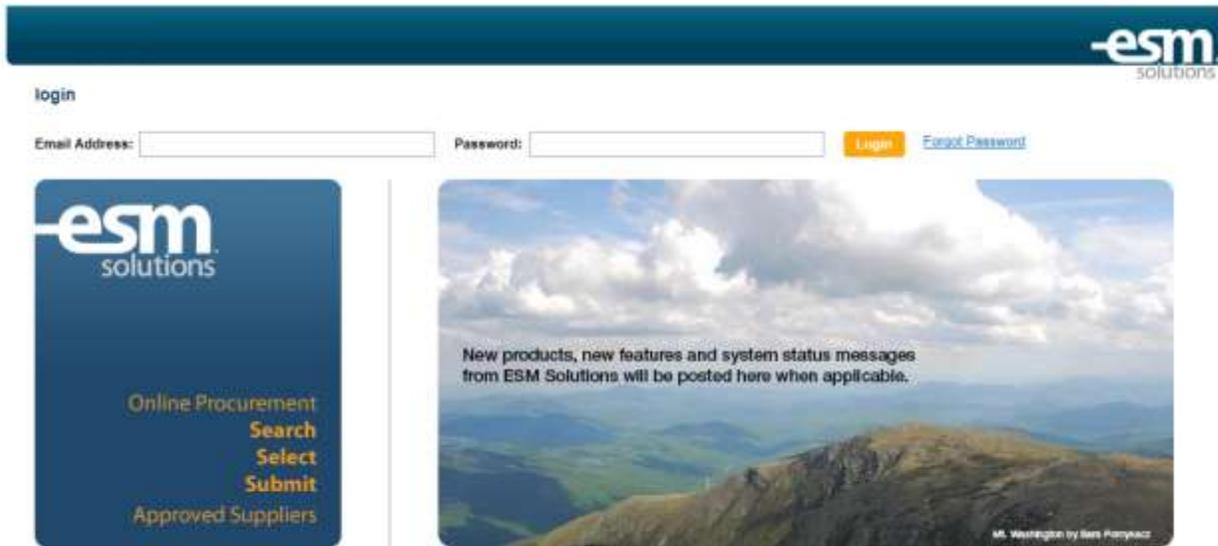


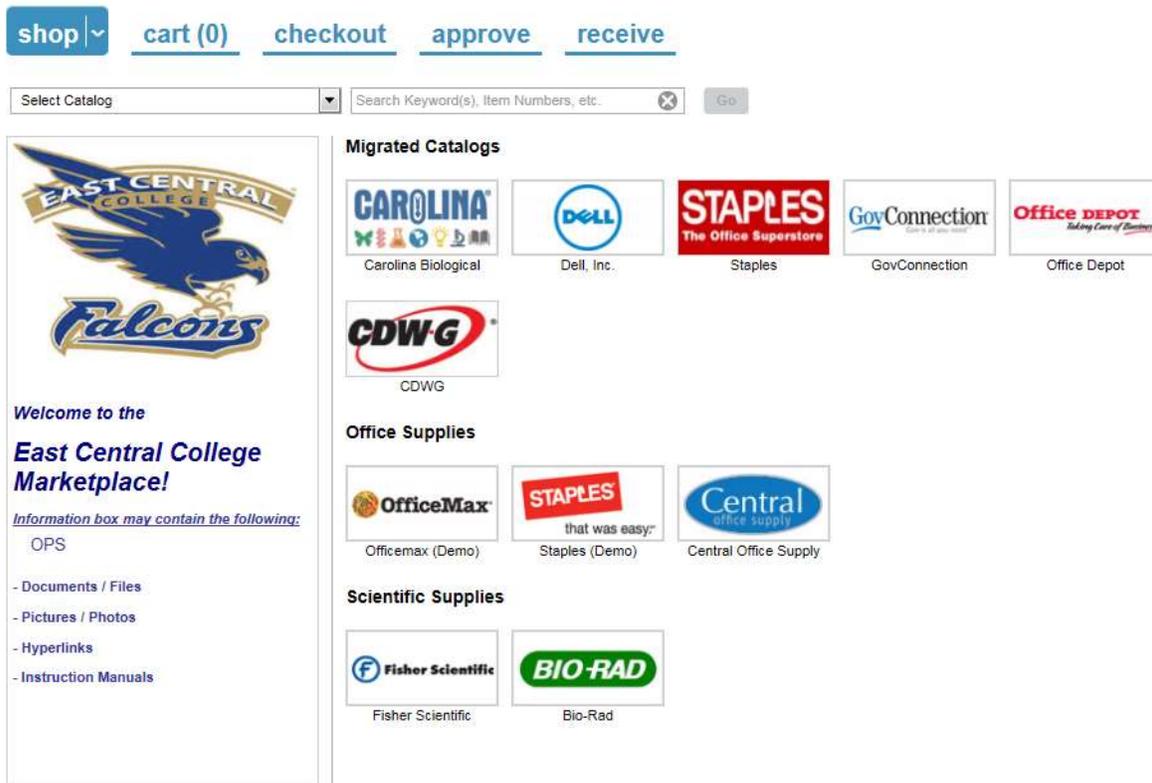
Training Link: <https://training.esmsolutions.com/?me=esm>

Use your current work e-mail address and you will set your own password from the password reset e-mail from ESM Solutions.



Creating an order using catalog vendors and non-catalog vendors:

1. To begin shopping using a catalog vendor you either:
 - a. Search using a keyword; or
 - b. Select a vendor by clicking on their icon



If you use the search function, i.e. your search for paper, you will see something like:

Select Catalog sort by: Relevance rows / pg: 10

17 items found in:

Filter By:

Preferred Supplier

Central Office Supply (5)

Staples (Demo) (6)

Supplier

Officemax (Demo) (6)

Price (USD)

Under 20 (8)

20 to 30 (3)

30 to 40 (0)

40 to 50 (4)

50 and above (2)

MFG/Provider

Hammermill (3)

OfficeMax (6)

Staples (4)

Swingline (1)

Texas Instruments (1)

[more](#)

1		<p>Staples #1 Size Paper Clips, Nonskid</p> <p>Catalog Item #: 472498</p> <p>MFG/Provider: Staples</p> <p>Preferred Supplier: Staples (Demo)</p> <p>Contract Name: 2212</p>	<p>List Price: 5.99</p> <p>Contract Price: 5.69 USD</p> <p>UOM: Pack</p> <p>Qty: <input type="text" value="0"/></p> <p>Item Total: 0.00 USD</p>	<input type="button" value="Add to Cart"/>
2		<p>Staples Multipurpose Paper, 8 1/2" x 11" Case</p> <p>Catalog Item #: 513096</p> <p>MFG/Provider: Staples</p> <p>Preferred Supplier: Staples (Demo)</p> <p>Contract Name: 2212</p>	<p>List Price: 58.79</p> <p>Contract Price: 55.85 USD</p> <p>UOM: Case</p> <p>Qty: <input type="text" value="0"/></p> <p>Item Total: 0.00 USD</p>	<input type="button" value="Add to Cart"/>
3		<p>Multipurpose Paper 8 1/2" x 11" (Letter Size)</p> <p>Catalog Item #: Central -006</p> <p>MFG/Provider: Hammermill</p> <p>Preferred Supplier: Central Office Supply</p> <p>Contract Name:</p>	<p>List Price: 52.44</p> <p>Contract Price: 48.77 USD</p> <p>UOM: Case</p> <p>Qty: <input type="text" value="0"/></p> <p>Item Total: 0.00 USD</p>	<input type="button" value="Add to Cart"/>

****It is important to note that not all catalog vendors will be brought up in the search. Some vendors have not made this particular feature available, instead you will have to go to their individual site within easyPurchase.****

- You can use the filter function located on the left to narrow down your search options.
- You can also select one or more vendors/products to add in the cart. The new system allows you to create multiple requisitions at one time when using the search function.

If you select a vendor by selecting their icon, you will be brought to their website (as you normally would in Mercury Commerce).

- Select catalog:

Migrated Catalogs



- Check out within the website like normal, once you get back to easyPurchase you will notice that your cart has an item, select cart to see:



- If everything looks ok, you can select continue to create your requisition, this will bring you to the checkout.

shop ▾ **cart (1)** checkout approve receive

sort by : rows / pg :

Convert Cart to 1 transaction(s):

1		Staples Copy Paper LETTER-Size_92/104 US/Euro Brightness_20 lb., 8 1/2" x 11", 1 Case, 5,000 sheets	Catalog Item #: 135848 MFG/Provider: STAPLES Supplier: Staples Contract Name:	List Price: 339.90 USD UOM: PK Qty: <input type="text" value="1"/> Item Total: 339.90 USD	<input type="button" value="Update"/> <input type="button" value="Delete"/>
---	---	---	--	--	--

Total Item(s) in Cart: 1
Number of Suppliers: 1
Cart Total: 339.90 USD
Convert Cart to 1 transaction(s):

- To checkout:
 - Select User Group, if you have multiple departments you work with.
 - Select Payment form, which will always be Purchase Order.
 - Select Release Method, for catalog vendors this will always default to Electronic
 - Select Order Type:
 - Standard for regular orders
 - Technology for anything IT will have to install, i.e. printers, software, iPads
 - Add any attachments or notes
 - Change ship to, if different from yourself
 - Select your GL Account Codes by selecting details if you haven't set up your favorites. Screen you'll see after selecting "details". Select update after you done.

SOLUTI

* Chart of Accounts:
 Index:
 Favorite:

* Fund:	<input type="text" value="10"/>	<input type="text" value="10 Unrestricted"/>
* Department:	<input type="text" value="63053"/>	<input type="text" value="Campus Svcs"/>
* Object:	<input type="text" value="5530"/>	<input type="text" value="Busn & Ind"/>
* Location:	<input type="text" value="00"/>	<input type="text" value="Union"/>

Item Split Detail

Delete	Favorite	Chart	Index	Account Code	Description	USD Split	% Split
<input type="checkbox"/>	<input checked="" type="checkbox"/>	10 Unrestricted		10-63053-5410-00	10 Unrestricted - Campus Svcs - Busn & Ind - Union	<input type="text" value="169.95"/>	<input type="text" value="50.00"/>
Remaining:						169.95	50.00

Requisition should look something like this after complete:

- To detail, select the arrow next to the 1 in the upper left hand corner.
- Select Update

Transaction #: 33376
* Transaction Name: 11/16/2015-12:32-Popp-Staples [edit](#)
User Group: VP Finance & Admin
Requester: Melissa Popp
Create Date: 11/16/2015
Supplier: Staples
Total Line Items: 1
Total Value: 339.90 USD

* Payment Form: Credit Card PO
Release Method: Electronic
Order Type: Standard
External Note: [add attachments](#)
Internal Note: [add attachments](#)
* Ship To - Attn: Melissa Popp
Fiscal Date: 11/16/2015 [reset](#)
Purchase Order #: 508059
Aux Field 1:
Aux Field 2:

Chart of Accounts: 10 Unrestricted
Index Code: [details](#)
GL Acct. Code: 10-63053-5410-00 [details](#)

Selection: Active
Status: Pending Validation
System Note: None
Next Step: Provide Missing Data

[Update](#) [Provide](#)

- Select Request

Transaction #: 33376
* Transaction Name: 11/16/2015-12:32-Popp-Staples [edit](#)
User Group: VP Finance & Admin
Requester: Melissa Popp
Create Date: 11/16/2015

* Payment Form: Credit Card PO
Release Method: Electronic
Order Type: Standard
External Note: [add attachments](#)
Internal Note: [add attachments](#)

Selection: Active
Status: Unsubmitted Transaction
System Note: None
Next Step: Request Approval

[Update](#) [Request](#)

- If you'd like to see the workflow before sending for approval, click the down arrow in the next step and select view workflow, and click view

Transaction #: 33376
* Transaction Name: 11/16/2015-12:32-Popp-Staples [edit](#)
User Group: VP Finance & Admin
Requester: Melissa Popp
Create Date: 11/16/2015

* Payment Form: Credit Card PO
Release Method: Electronic
Order Type: Standard
External Note: [add attachments](#)
Internal Note: [add attachments](#)

Selection: Active
Status: Unsubmitted Transaction
System Note: None
Next Step: View Workflow

[Update](#) [View](#)

- Select Refresh

View Workflow - easyPurchase

Workflow is calculating. Click Refresh to update the status.

[Refresh](#) [Close](#)

- Select View and Close when finished.

View Workflow - easyPurchase

Transaction #: 33376

Workflow Name	Priority	Nest	Approver/Manager Name	Status
VP Finance & Admin (General)	1000	1	Phil Pena	Pending
President (\$1K+)	1500	2	Jon Bauer	Pending
Back-end Approval Workflow	2000	3	Lark Hoffman	Pending
		4	NEXT Shirley Hofstetter	Pending

Refresh Close

- Select Request when ready to submit order for approval, screen should like this:

Transaction #: 33377

* Transaction Name: 11/16/2015-12:49-Popp-Staples [edit](#)

User Group: [VP Finance & Admin](#)

Requester: Melissa Popp

* Payment Form: Credit Card PO

Release Method: [Electronic](#)

Order Type: [Standard](#)

External Note: [add attachments](#)

Internal Note: [add attachments](#)

Selection: Active

Status: Unsubmitted Transaction

System Note: None

Next Step: [Request Approval](#)

Update Request

- If everything goes through, your requisition should have a status of Pending Approval:

Transaction #: 33377

* Transaction Name: 11/16/2015-12:49-Popp-Staples [view](#)

User Group: [VP Finance & Admin](#)

Requester: Melissa Popp

Create Date: 11/16/2015

* Payment Form: PO

Release Method: [Electronic](#)

Order Type: [Standard](#)

External Note:

Internal Note:

Selection: [Waiting](#)

Status: [Pending Approval](#)

System Note: [History](#)

Next Step: [View Workflow](#)

Update View

2. Creating requisition for non-catalog vendors

- Select the dropdown on the shop tab and select "non-catalog item"



- Put in the vendor you want to search for and select go.

shop cart (0) checkout approve receive

Supplier: Go

- Select the correct vendor by clicking on the name (make sure you double check the address)

Non-Catalog Item - easyPurchase

rows / pag: 10 Go

Supplier Name (Select Supplier)	GL Code	Address	Contact Name	Contact Email PO Email	Contact Phone
School District of Washington	0133342	220 Locust Street Washington, MD, 63090, United States	Account Receivable		(000)000-0000
School District of Washington	0133342	4245 Highway 47, Technology Services Washington, MD, 63090, United States	Account Receivable		(000)000-0000

Add New Cancel

- Click on “New Item”

Supplier Name: [School District of Washington](#) New Item

- Fill in the appropriate information, click on “add to cart”

Product Detail - easyPurchase

* Item/Service:

* UOM: ?

* Qty:

List Price:

S & H:

MFG/Provider:

MFG/Provider Part #:

Catalog Item #:

UPC:

CAS Number:

* = required field

Add to Cart
Cancel

- Select New Item as necessary, when complete select Continue to get to the requisition stage

sort by: rows / pg: Convert Cart to 1 transaction(s): Continue

1		Subscription Renewal	Catalog Item #: MFG/Provider: Supplier: School District of Washington Contract Name:	List Price: 100.00 USD UOM: Each Qty: <input type="text" value="1"/> Item Total: 100.00 USD	<input type="button" value="Update"/> <input style="background-color: red; color: white;" type="button" value="Delete"/>
2		Invoice	Catalog Item #: MFG/Provider: Supplier: School District of Washington Contract Name:	List Price: 200.00 USD UOM: Each Qty: <input type="text" value="1"/> Item Total: 200.00 USD	<input type="button" value="Update"/> <input style="background-color: red; color: white;" type="button" value="Delete"/>

Total Item(s) in Cart: 2
 Number of Suppliers: 1
 Cart Total: 300.00 USD

Convert Cart to 1 transaction(s): Continue

Follow previous instructions on creating requisition and submission for approval

3. Creating requisition for check request.
 - a. Follow steps for creating a requisition for non-catalog items.
 - b. For the requisition you will need to do the following for a check request.
 - Release Method should be Confirming Request
 - Order Type should be Check Request
 - Add your attachments and notes

Transaction #: 33402	* Payment Form: <input type="radio"/> Credit Card <input checked="" type="radio"/> PO	Selection: Active	<input type="button" value="Update"/>
* Transaction Name: 11/16/2015-16:05-Popp-School District... edit	Release Method: Confirming Request	Status: Pending Validation	<input type="button" value="Validate"/>
User Group: VP Finance & Admin	Order Type: Check Request	System Note: None	
Requester: Melissa Popp	External Note: don't forget edit attachments (1)	Next Step: Validate	
Create Date: 11/16/2015	Internal Note: add attachments		
Supplier: School District of Washington	* Ship To - Attn: Melissa Popp		
Total Line Items: 2	Fiscal Date: 11/16/2015 <input type="button" value="calendar"/> <input type="button" value="reset"/>		
Total Value: 300.00 USD	Purchase Order #: 508061		
	Aux Field 1: <input type="text"/>		
	Aux Field 2: <input type="text"/>		
	* Chart of Accounts: 10 Unrestricted		
	Index Code: <input type="text"/> details		
	* GL Acct. Code: 10-63053-5410-00 <input type="button" value="dropdown"/> details		