Training Link: https://training.esmsolutions.com/?me=esm
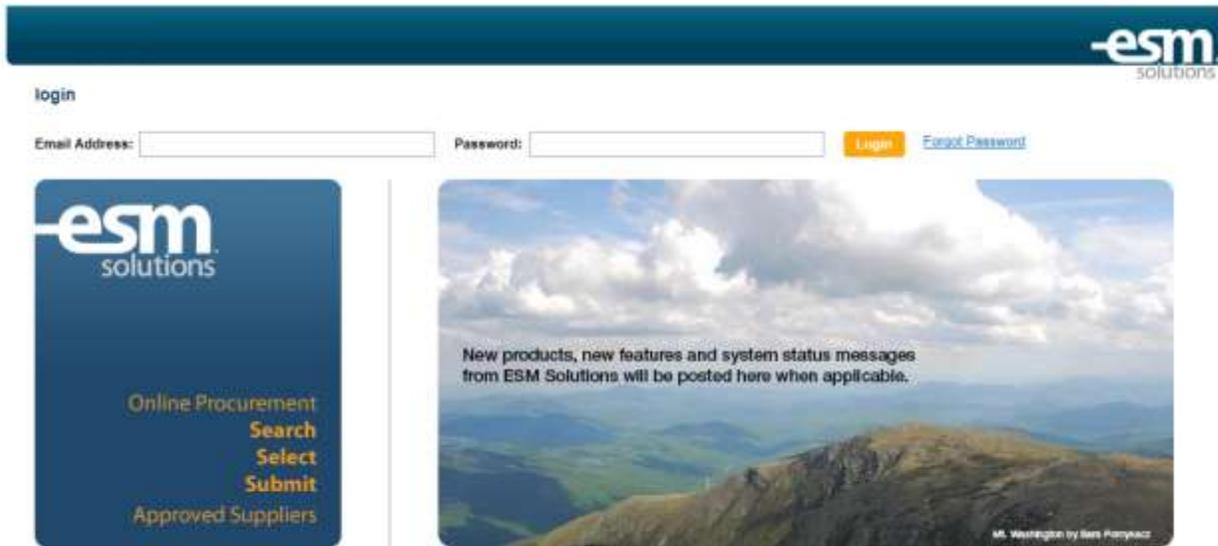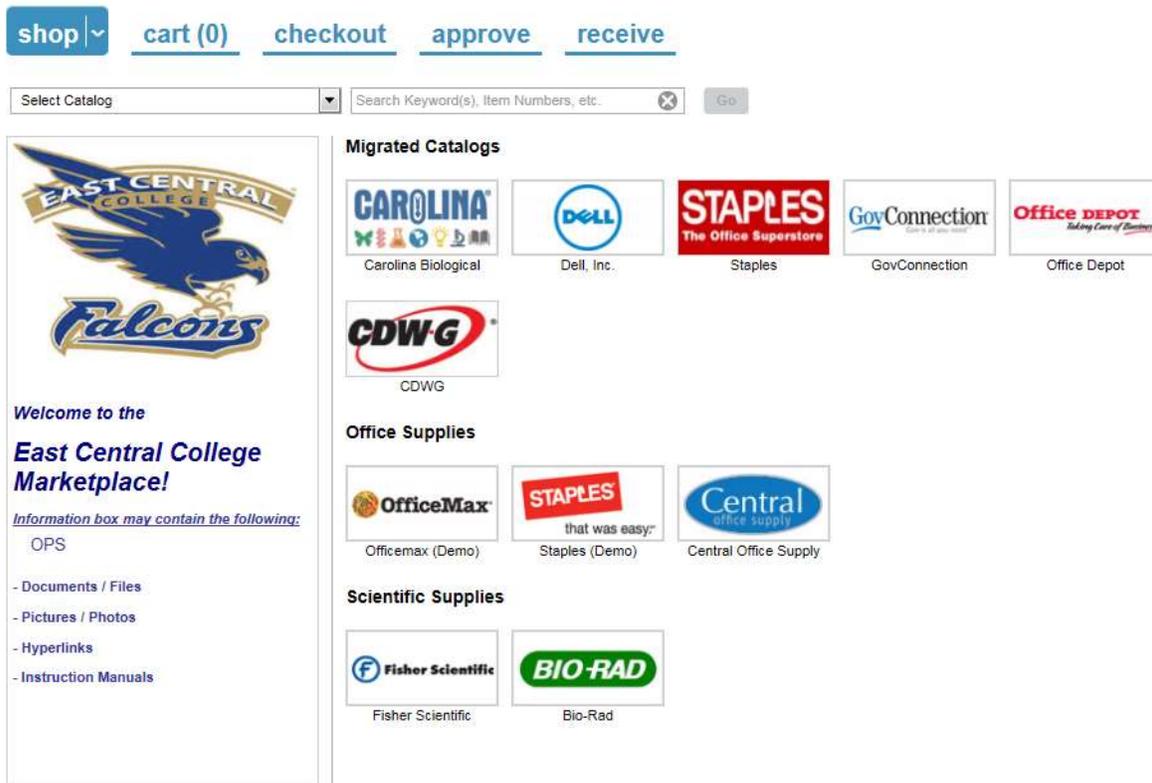
Use your current work e-mail address and you will set your own password from the password reset e-mail from ESM Solutions.

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:

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:

- 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.

- 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.

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

- Select 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

- Select Refresh

- 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:

1 ►

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:

1 ►

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"

shop |∨ cart (0) checkout approve receive

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

shop |∨ cart (0) checkout approve receive

Supplier: Washington   Go

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

Non-Catalog Item - easyPurchase

rows / pg : 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, MO, 63090, United States	Account Receivable		(000)000-0000
School District of Washington	0133342	4245 Highway 47, Technology Services Washington, MO, 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"

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

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