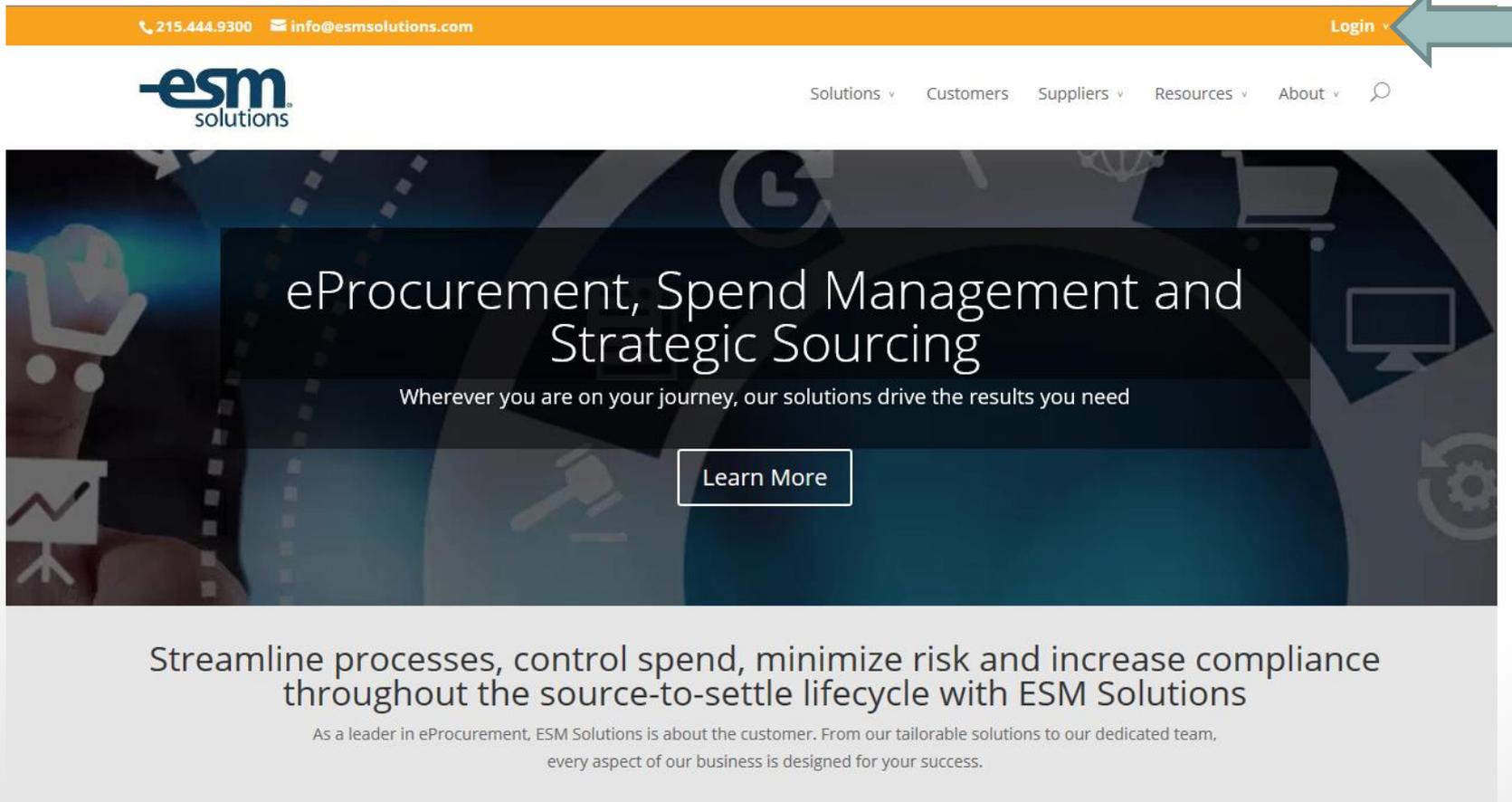


MERCURY COMMERCE

THE BASICS

Getting Started....

- Website www.mercurycommerce.com
- Click on “Login” and select “Customer Login”



The image shows a screenshot of the ESM Solutions website. At the top, there is an orange navigation bar with the phone number 215.444.9300 and email info@esmsolutions.com on the left, and a 'Login' button on the right. A large blue arrow points to the 'Login' button. Below the navigation bar is the ESM Solutions logo and a menu with links for Solutions, Customers, Suppliers, Resources, and About. The main content area features a dark blue background with various icons and the text: 'eProcurement, Spend Management and Strategic Sourcing', 'Wherever you are on your journey, our solutions drive the results you need', and a 'Learn More' button. Below this is a white section with the text: 'Streamline processes, control spend, minimize risk and increase compliance throughout the source-to-settle lifecycle with ESM Solutions' and a paragraph: 'As a leader in eProcurement, ESM Solutions is about the customer. From our tailorable solutions to our dedicated team, every aspect of our business is designed for your success.'

Getting Started (cont.)...

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

Customer Login

Not a customer? [Login as a supplier.](#)



easyPurchase



eSchoolMall Version



Mercury Version



Training Login

[The links below are for implementation training purposes only.](#)



easyPurchase



eSchoolMall Version



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

You are not currently logged in

[Home](#)

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.



The screenshot shows a login form with the following fields and elements:

- Customer ID:** [Forgot Customer ID?](#) (Input field contains 012504670)
- User Name:** (Input field contains garrism)
- Password:** [Forgot Password?](#) (Input field is empty)
- Remember Me**
-

Three green arrows point to the Customer ID, User Name, and Password input fields.

Maintenance Scheduled

Begin: 8/2/2013 8:00 PM ET

End: 8/3/2013 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



You are logged in as Melissa Popp for East Central College

[Logout](#)

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

Solutions

[easyPurchase](#)

Customer Care

[Help Library](#)

[General Feedback](#)

[Enhancement Request](#)

[Customer Support](#)

easyPurchase - *you have...*

- No activities to process.

← Step 1

Step 2

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:

Mercury Commerce Solutions easyPu...

Melissa Garrison for East Central College

Requisition [Redacted]

Summary Reports User Preferences Help Exit

Requisition Search

Requisition Number:

Or

Status:

Create Date Range: To

Vendor Name:

Requisition Name:

Quick Search:

- 0 [Unsubmitted](#)
- 0 [Returned](#)
- 0 [Maintenance Required](#)

Create:

[New Requisition](#)

Search Results

Requisition #	Requisition Name	Requisition Justification	Vendor	Total (\$)	# Items	Requisition Status	Created Date
11658	Klos - Camera Equipment		GovConnection (Punchout)	102.54	3	Complete	2/9/2011 9:11:20 AM

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

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.

Catalogs:

Keyword(s):

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

 Vendor Name:

or

 Vendor Number:

optional

 City:

 State / Province:

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”

Manual Requisition - Item Input

Vendor Name:	CDW-G, Inc.	State / Province:	IL
Vendor Number:	0088762	Postal Code:	606751515
Address Line 1:	75 Remittance Dr Ste 1515	Contact Name:	Andrew St. Jules
Address Line 2:	andstj@cdw.com	Phone:	(312)705-1133
City:	Chicago	Fax:	(312)705-1133

Description	Mfg's Name	Vendor's Item Number	Unit of Measure	Price (\$)	Qty
			Each		

[Update - Add Line](#) [Submit](#) [Search Catalog](#) [Return](#)

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.

Your Requisition & Tips

cart/requisition | approval | purchase orders | receive | system settings

summary | reports

Cart/Requisition Modify

Cart/Requisition Number: 41

Cart/Requisition Name: [Redacted]

Cart/Requisition Justification: [Redacted]

Ship To Location: Dock 1 East Central Colle [Redacted]

Approval Route: [Select One] [Redacted]

Needed By (mm/dd/yyyy): [Redacted]

Update All Account #s: [Redacted]

Notes & Attachments: [Pencil icon] [Paperclip icon]

Vendor Name: GovConnection

Fiscal Date (mm/dd/yyyy): 8/01/2013

Update All Deliver To's: [Redacted]

Credit Card: N/A

Confirming Request: [Redacted]

[Add Item] [Save] [Submit For Approval] [Return]

Line Number	Product Number	Product Description	Unit Price	Qty	Line Item Total	Remove
1		Scanner (more info)	99.0000	1	99.00	[Remove]
		Account Code: + [Redacted]				
					Total:	99.00

[Add Item] [Save] [Submit For Approval] [Return]

powered by  esm solutions

All times displayed in [Eastern Standard Time](#) (click to change).
easyTouch Navigation™ - Customer Support at (877) 969-7246 or support@mercurymcommercesolutions.com

- 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.

Confirming Request

**cart/
requisition** | [approval](#) | [purchase
orders](#) | [receive](#) | [system
settings](#)

[summary](#) | [reports](#)

Cart/Requisition Modify

Cart/Requisition Number:	41	Vendor Name:	GovConnection
Cart/Requisition Name:	<input type="text"/>	Fiscal Date (mm/dd/yyyy):	<input type="text" value="8/01/2013"/>
Cart/Requisition Justification:	<input type="text"/>	Update All Deliver To's:	<input type="text"/>
Ship To Location:	<input type="text" value="Dock 1 East Central College"/>	Credit Card:	N/A
Approval Route:	<input type="text" value="[Select One]"/>	Confirming Request:	<input type="checkbox"/> 
Needed By (mm/dd/yyyy):	<input type="text"/>		
Update All Account #s:	<input type="text" value="+"/>		
Notes & Attachments:	<input type="text" value=""/>  		

Line Number	Product Number	Product Description	Unit Price	Qty	Line Item Total	Remove
1		Scanner (more info)	99.0000	1	99.00	<input type="checkbox"/>
	Account Code: <input type="text" value="+"/>					

Total: 99.00

Completed Requisition Example

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

MCS Demo Environment
Melissa Popp for East Central College



easyPurchase - Demo Mercury Commerce Version

[user preferences](#) [help](#) [exit](#)

[cart/requisition](#) [approval](#) [purchase orders](#) [receive](#) [system settings](#)

[summary](#) | [reports](#)

Cart/Requisition Modify

Requisition "43" has been saved. 

Cart/Requisition Number: 43
Cart/Requisition Name: Service Agreement
Cart/Requisition Justification:
Ship To Location: Dock 1 East Central College
Approval Route: Check Request
Needed By (mm/dd/yyyy):
Update All Account #s:
Notes & Attachments:

Vendor Name: [GovConnection](#)
Fiscal Date (mm/dd/yyyy): 8/01/2013
Update All Deliver To's:
Credit Card: N/A
Confirming Request: 

[Add Item](#) [Save](#) [Submit For Approval](#) [Return](#)

Line Number	Product Number	Product Description	Unit Price	Qty	Line Item Total	Remove	Notes & Atts	Deliver To
1		Service Agreement for HP4015n (more info)	285.0000	1	285.00	<input type="checkbox"/>		Popp, Melissa

Account Code: [+](#) 100

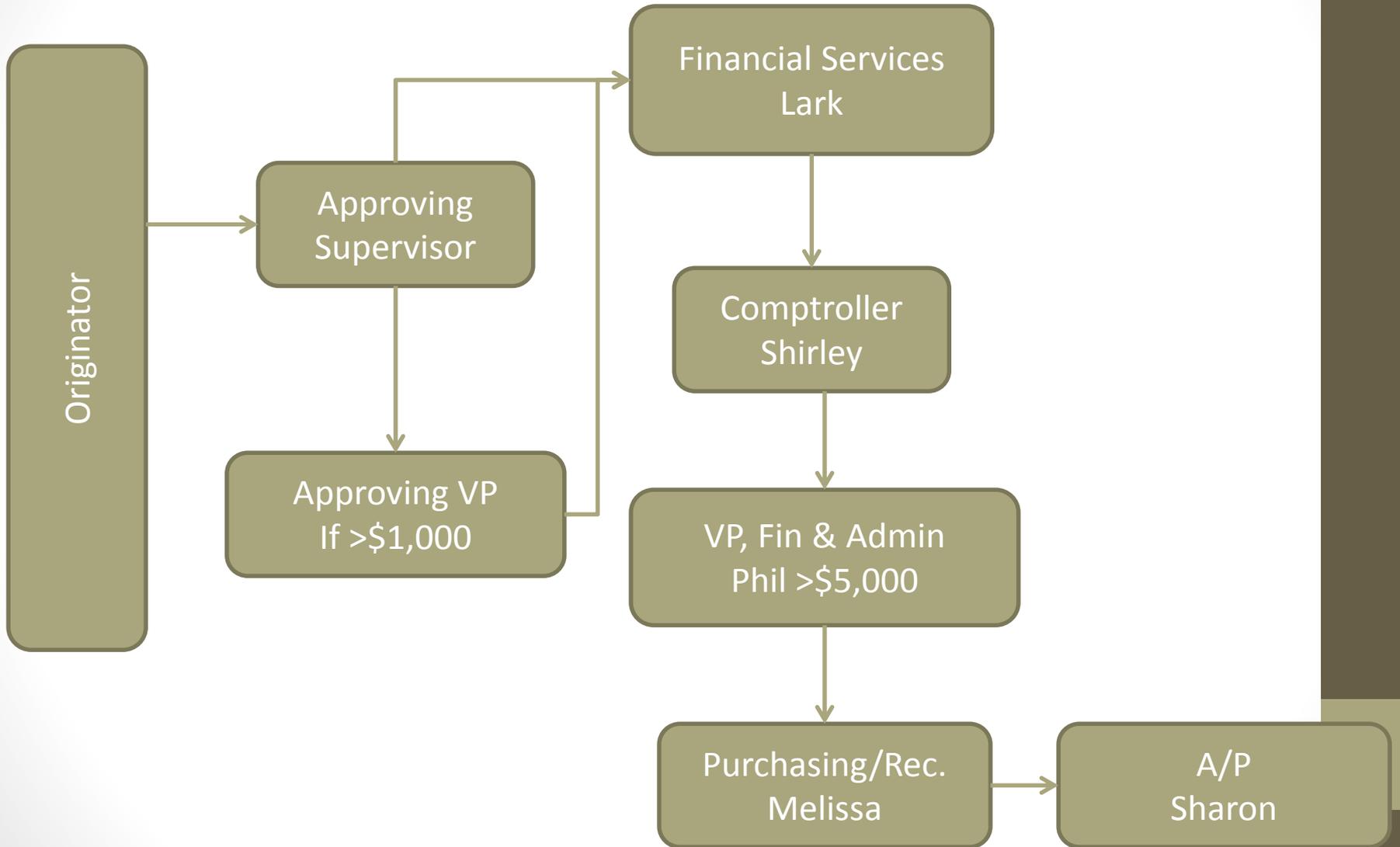
Total: 285.00

[Add Item](#) [Save](#) [Submit For Approval](#) [Return](#)

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



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!