

ESM Purchase[™] Integrated Cart Reference Guide



Table of Contents

ESM Purchase™ Integrated Cart Process.....	3
Shop	3
Non-Catalog Item	5
Cart	6

ESM Purchase™ Integrated Cart Process

This document provides a condensed overview of the ESM Purchase™ Integrated Cart Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Shop

The Requester will punch into ESM Purchase™ from their ERP System. The Requester selects various items from assigned catalogs. There are two types of catalogs: Punch-out and Hosted. A Hosted Catalog contains items that are uploaded into ESM Purchase, and a Punch-out Catalog opens a customized version of the Supplier's website.

shop - shopper @ esm

cart (0) menu v help log out

The screenshot shows the ESM Marketplace interface. At the top left, there is a 'shop' dropdown menu and a 'cart (0)' link. Below this is a search bar with the placeholder text 'Search Keyword(s), Item Numbers, etc.' and a 'Go' button. On the left side, there is a 'Welcome to the ESM Marketplace!' message with three icons representing different features. On the right side, there are two sections: 'IT Suppliers' and 'Office Suppliers'. The 'IT Suppliers' section includes logos for Dell - Training, GovConnection, and CDWG. The 'Office Suppliers' section includes logos for Staples (Demo), OfficeMax (Demo), and Office Depot (Demo).

1. Search Items: Search for items from assigned catalogs
2. Information Box: Entity-wide material determined by Sys Admin
3. Category: Header to group catalogs
4. Catalog: Icon for easy access to assigned catalogs

The Requester can select a catalog or search for items.

shopping results - shopper @ esm

cart (0) menu help log out

shop cart (0)

Select Catalog pencil sort by: Relevance rows / pg: 10 Go

8 items found in:

1 Filter By:

Preferred Supplier

Staples (Demo) (2)

Supplier

GovConnection (4)

Officemax (Demo) (2)

Price (USD)

Under 30 (5)

30 to 60 (1)

60 to 90 (0)

90 to 120 (0)

120 and above (2)

MFG/Provider




Crayola (1)

Dixon (2)

Keytec, Inc. (2)

Motion Computing (2)

Westcott (1)

1		Dixon Tic onderoga Pencils, #2 Soft, Dozen Catalog Item #: 487129 MFG/Provider: Dixon Preferred Supplier: Staples (Demo) Contract Name:	List Price: 3.35 Contract Price: 3.18 USD UOM: Dozen 2 Qty: <input type="text" value="5"/> Item Total: 15.90 USD	3 Add to Cart
2		Dixon Oriole Pencils, #2 Soft, Dozen Catalog Item #: 499392 MFG/Provider: Dixon Preferred Supplier: Staples (Demo) Contract Name:	List Price: 2.99 Contract Price: 2.84 USD UOM: Dozen Qty: <input type="text" value="0"/> Item Total: 0.00 USD	Add to Cart
3		Tic onderoga #2 Pencils, Dozen Catalog Item #: 21512944 MFG/Provider: Crayola Supplier: Officemax (Demo) Contract Name:	List Price: 3.29 Contract Price: 2.96 USD UOM: Box Qty: <input type="text" value="3"/> Item Total: 8.88 USD	Add to Cart

1. Filter By: Criteria to narrow down Shopping Results
2. Qty: Desired quantity for transaction
3. Add to Cart: Select when all quantities are completed

After selecting 'Add to Cart', the total quantity of item(s) is listed behind the Cart. The Requester can continue to Shop, or go to their Cart by selecting either of the two options highlighted below.

shopping results - shopper @ esm

cart (8) menu help log out

shop cart (8)

Non-Catalog Item

The Requester creates a Non-Catalog Item by selecting the downward facing caret on the Shop tab. A Non-Catalog Item allows the Requester to create an item that is not provided in the catalogs, if the Supplier has allowed for it.

The screenshot shows the ESM Marketplace interface. At the top right is the 'esm solutions' logo. Below it, the user is logged in as 'shop - shopper @ esm'. There are links for 'cart (0)', 'menu', 'help', and 'log out'. The 'shop' dropdown menu is open, showing 'Non-Catalog Item' as the selected option. Below the dropdown is a search bar with the placeholder text 'Search Keyword(s), Item Numbers, etc.' and a 'Go' button. The main content area is divided into two columns. The left column contains a 'Welcome to the ESM Marketplace!' section with 'News & Events', 'Procurement Information' (contacting 1-877-969-7246 or support@esmsolutions.com), and 'User Help'. The right column contains 'IT Suppliers' (Dell - Training, CDWG, GovConnection) and 'Office Suppliers' (Staples (Demo), OfficeMax (Demo), Office Depot (Demo)).


The Requester searches for the Supplier and selects 'New Item'. The Product Detail has required fields to create the item and 'Add to Cart'.

The screenshot shows the 'Product Detail - easyPurchase' form. At the top, there is a 'Supplier:' search field with a 'Go' button. Below that, the 'Supplier Name:' is 'GovConnection' and there is a 'New Item' button. The form is titled 'Product Detail - easyPurchase' and has a close button. The form contains the following fields: '* Item/Service: Description' (text area), '* UOM: Each' (dropdown), '* Qty:' (text input), 'List Price: 0.00' (text input), 'S & H:' (text input) and 'USD' (dropdown), 'MFG/Provider:' (text input), 'MFG/Provider Part #:' (text input), 'Catalog Item #:' (text input), 'UPC:' (text input), and 'CAS Number:' (text input). A note at the bottom states '* = required field'. There are 'Add to Cart' and 'Cancel' buttons at the bottom of the form.

Cart

The Requester can edit the quantity or delete items. Then, Convert Cart to X transaction(s) by selecting Continue. More than one transaction is created if the items are from multiple Suppliers. The transactions are transferred back into the Requester's ERP System.



cart - shopper @ esm

 cart (8) menu v help log out

[shop](#) v **cart (8)**

sort by : rows / pg :

Convert Cart to 2 transaction(s):

1		Ticonderoga #2 Pencils, Dozen	Catalog Item #: 21512944 MFG/Provider: Crayola Supplier: Officemax (Demo) Contract Name:	Contract Price: 2.96 USD UOM: Box Qty: <input type="text" value="3"/> Item Total: 8.88 USD	<input type="button" value="Update"/> <input type="button" value="Delete"/>
2		Dixon Ticonderoga Pencils, #2 Soft, Dozen	Catalog Item #: 487129 MFG/Provider: Dixon Preferred Supplier: Staples (Demo) Contract Name:	Contract Price: 3.18 USD UOM: Dozen Qty: <input type="text" value="5"/> Item Total: 15.90 USD	<input type="button" value="Update"/> <input type="button" value="Delete"/>

Total Item(s) in Cart: 8
Number of Suppliers: 2
Cart Total: 24.78 USD

Convert Cart to 2 transaction(s):