



ESM Purchase™ Order Release Reference Guide



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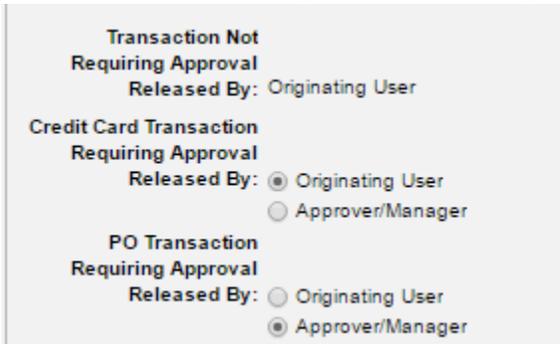
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ESM Purchase™ Releasing Orders

This document provides a condensed overview of the order release process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Entity Configuration: Who releases the Order?

The user responsible for releasing (**and re-releasing**) the order is determined by the Entity Settings.



The screenshot shows three sections of configuration:

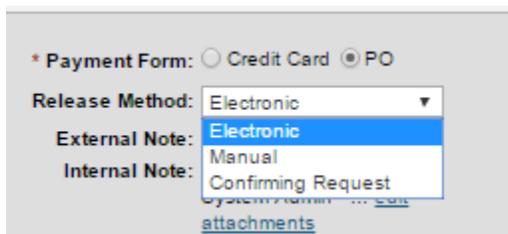
- Transaction Not Requiring Approval**: Released By: Originating User
- Credit Card Transaction Requiring Approval**: Released By: Originating User, Approver/Manager
- PO Transaction Requiring Approval**: Released By: Originating User, Approver/Manager

As a result, the order can be released from the Checkout Tab, Approve tab or Manage Tab based on configuration.

Note: If the Originating User releases the order, an email notification is sent to prompt the requester to release the approved order.

Release Methods

The Requester (originating user) determines the release method and payment form, which are confirmed by the approver(s).



The screenshot shows the following configuration options:

- * Payment Form**: Credit Card, PO
- Release Method**: A dropdown menu with "Electronic" selected.
- External Note**: A dropdown menu with "Electronic" selected.
- Internal Note**: A dropdown menu with "Manual" selected.

Below the dropdowns, there are links for "System Admin" and "Attachments".

Electronic: Email or XML (Punchout catalog)

Manual: email is sent to user containing the purchase order. The user must provide the order to the supplier.

Confirming Request: Optional method that prompts the supplier to confirm receipt.

Releasing Orders

The user can release the order by selecting Prepare (Credit Card) or Release (Purchase Order).

selection : Transaction # : PO # : sort by : rows / pg :

<p>1 ▶ Transaction #: 42669</p> <p>User Group: Unassigned Requester: Shopper user Create Date: 6/15/2016 Supplier: GovConnection Total Value: 884.66 USD</p>	<p>* Payment Form: Credit Card Release Method: Electronic External Note: Internal Note: 06/15/2016 12:58 EST Shopper user - A... view</p> <p>* Ship To - Attn: Shopper user Purchase Order #: 15</p>	<p>Selection: Active Status: CC Information Required System Note: None</p> <p>Next Step: <input type="text" value="Prepare CC Order"/></p> <p><input type="button" value="Update"/> <input type="button" value="Prepare"/></p>
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<p>2 ▶ Transaction #: 41984</p> <p>User Group: Unassigned Requester: Shopper user Create Date: 6/2/2016 Preferred Supplier: Dell - Training Total Value: 2,367.99 USD</p>	<p>* Payment Form: PO Release Method: Electronic External Note: Internal Note: 06/21/2016 10:04 EST System Admin - ... view</p> <p>* Ship To - Attn: Shopper user Purchase Order #: 14</p>	<p>Selection: Active Status: Pending Release System Note: None</p> <p>Next Step: <input type="text" value="Release PO"/></p> <p><input type="button" value="Update"/> <input type="button" value="Release"/></p>
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If the Next Step drop-down states "Prepare CC Order," the user will be prompted to enter the credit card information and select Continue.



GovConnection
NA
Merrimack, NH 03054
United States
Attn: Maureen Gallagher
Phone: 800-800-0019 x33176
Fax:

Date: 6/22/2016
Purchase Order #: 15
Transaction #: 42669
Requested By: Shopper user
Requester Email: shopper@esmsolutions.com
Phone: 877-969-7246 ext. 3
Authorized By: System Admin

Ship To
ESM
Accounts Payable
2700 Kelly Road Suite 100
Warrington, PA 18978
United States
Attn: Shopper user
Phone: 877-969-7246 ext 3

Bill To

Entity Name: ESM

* Name on Card:

* Contact Phone Number:

* Card Type:

* Card #:

* Expiration Date:

Order Comments:

Line #	Item #	Description	UOM	QTY	Unit Price	Line Total
1	34058	Printers - Input Trays/Feeders	EA	1	242.93 USD	242.93 USD

If the Next Step drop-down states "Release PO," the user will be prompted review the order and select Continue.



Dell - Training
One Dell Way
Round Rock, TX 78682
United States
Attn: Dell User
Phone: 888-www-dell
Fax:

Date: 6/22/2016
Purchase Order #: 14
Transaction #: 41984
Requested By: Shopper user
Requester Email: shopper@esmsolutions.com
Phone: 877-969-7246 ext. 3
Authorized By: System Admin

Continue

Print

Cancel

Ship To
ESM
Accounts Payable
2700 Kelly Road Suite 100
Warrington, PA 18978
United States
Attn: Shopper user
Phone: 877-969-7246 ext 3

Bill To
ESM
Accounts Payable
2700 Kelly Road Suite 100
Warrington, PA 18978
United States
Attn: Accounts Payable
Phone: 877-969-7246 ext 3

Order Comments:

Line #	Item #	Description	UOM	QTY	Unit Price	Line Total
1	E8520	Dell Latitude E8520 Ship To Attn: Shopper user	each	2	1,109.00 USD	2,218.00 USD
2	320-9700	Dell Professional P1913S 19" Monitor with LCD Ship To Attn: Shopper user	each	1	149.99 USD	149.99 USD

Select Place Order to confirm release.

Requester Email: shopper@esmsolutions.com
Phone: 877-969-7246 ext. 3
Authorized By: System Admin

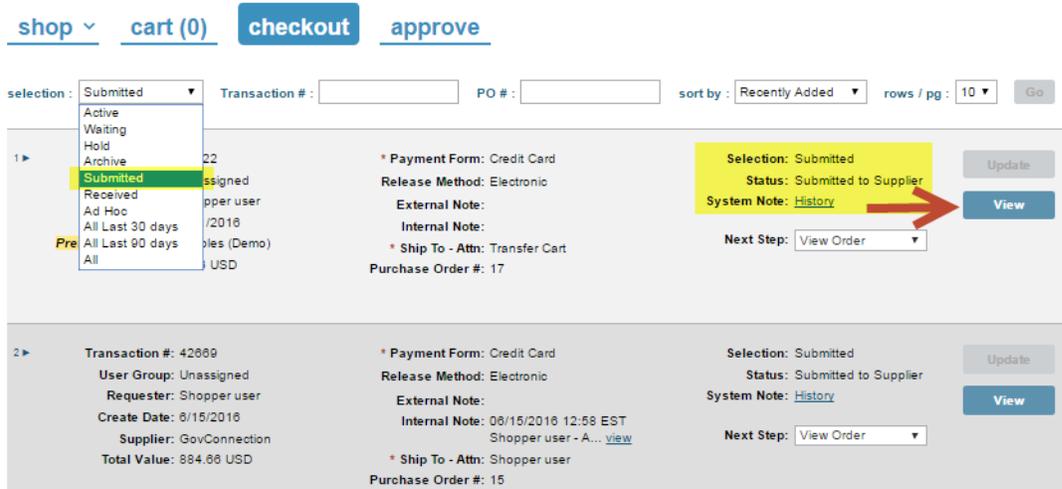
Submit Order - easyPurchase

This action will result in the order being transmitted to the supplier.
Are you sure you wish to continue?

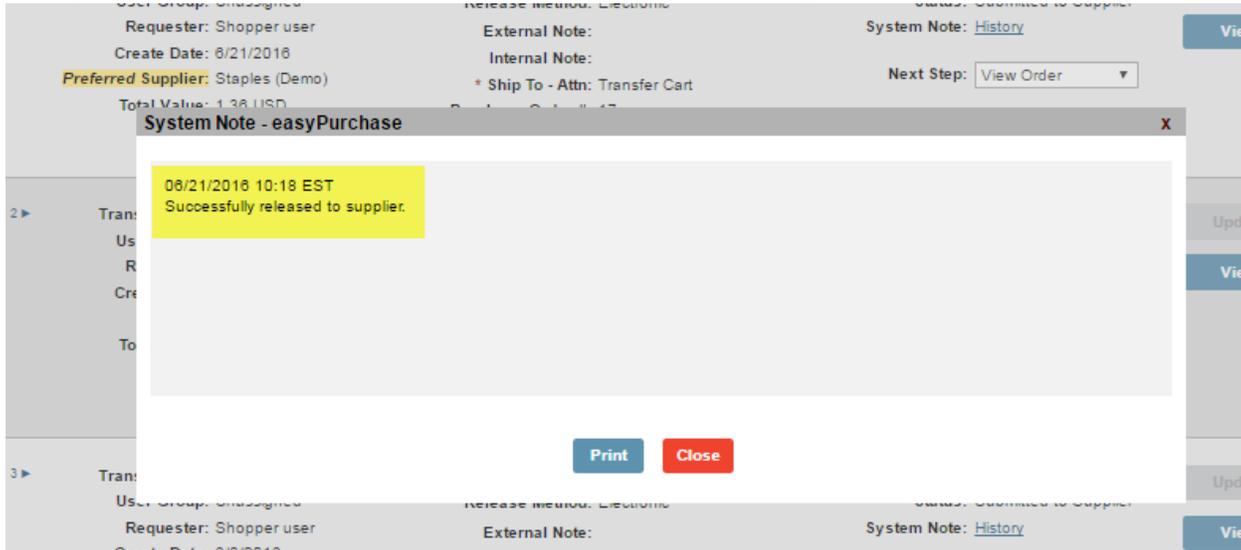
Place Order Cancel

Entity Name: ESM
User on Card: Shopper user
Phone Number: 877-969-7246 ext. 3
Card Type: Visa

When successfully submitted, the order will appear under the Selection filter "Submitted" with the Status of "Submitted to Supplier." The user may select the Next Step "View Order" to print the order.



The System Note History states the time the order was successfully released.



Release Failed

ESM Customer Support receives a notification when an order released failed. The team will work with the supplier to resolve any issues.

1 ▶	Transaction #: 42922 User Group: Unassigned Requester: Shopper user Create Date: 6/21/2016	* Payment Form: Credit Card Release Method: Electronic External Note: Internal Note:	Selection: Active Status: Release Failed System Note: History
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The user may be prompted to re-release the order if the supplier did not receive it or the credit card was declined.

If the supplier confirms receipt, Support will mark the order as Submitted and notify the user.

Re-Releasing Orders

Select "Re-release Order" from the Next Step drop-down.

1 ▶	Transaction #: 42922 User Group: Unassigned Requester: Shopper user Create Date: 6/21/2016 Preferred Supplier: Staples (Demo) Total Value: 1.36 USD	* Payment Form: Credit Card Release Method: Electronic External Note: Internal Note: * Ship To - Attn: Transfer Cart Purchase Order #: 17	Selection: Active Status: Release Failed System Note: History Next Step: View Order Request Approval View Workflow Ad Hoc Review Route to Back Office Prepare CC Order Encumber Release PO Hold Delete View Order View Receipts Archive Re-Release Order Copy Transaction	Update View
2 ▶	Transaction #: 42889 User Group: Unassigned Requester: Shopper user Create Date: 6/15/2016 Supplier: GovConnection Total Value: 884.66 USD	* Payment Form: Credit Card Release Method: Electronic External Note: Internal Note: 06/15/2016 12:58 EST Shopper user - A... view * Ship To - Attn: Shopper user Purchase Order #: 15	Selection: Submitted Status: Submitted to Supplier System Note: History Next Step: Re-Release Order	Update View

Select Prepare (CC Order) or Release (PO).

2 ▶	Transaction #: 42889 User Group: Unassigned Requester: Shopper user Create Date: 6/15/2016 Supplier: GovConnection Total Value: 884.66 USD	* Payment Form: Credit Card Release Method: Electronic External Note: Internal Note: 06/15/2016 12:58 EST Shopper user - A... view * Ship To - Attn: Shopper user Purchase Order #: 15	Selection: Submitted Status: Submitted to Supplier System Note: History Next Step: Re-Release Order	Update Prepare
3 ▶	Transaction #: 41984 User Group: Unassigned Requester: Shopper user Create Date: 6/2/2016 Preferred Supplier: Dell - Training Total Value: 2,367.99 USD	* Payment Form: PO Release Method: Electronic External Note: Internal Note: 06/21/2016 10:04 EST System Admin - ... view * Ship To - Attn: Shopper user Purchase Order #: 14	Selection: Submitted Status: Submitted to Supplier System Note: History Next Step: Re-Release Order	Update Release

If the Payment Form is Credit card and it was declined, provide new card information. Select Continue and Place Order.



Dell - Training
One Dell Way
Round Rock, TX 78682
United States
Attn: Dell User
Phone: 888-www-dell
Fax:

Date: 6/22/2016
Purchase Order #: 14
Transaction #: 41984
Requested By: Shopper user
Requester Email: shopper@esmsolutions.com
Phone: 877-969-7246 ext. 3
Authorized By: System Admin

Ship To
ESM
Accounts Payable
2700 Kelly Road Suite 100
Warrington, PA 18976
United States
Attn: Shopper user
Phone: 877-969-7246 ext 3

Bill To
ESM
Accounts Payable
2700 Kelly Road Suite 100
Warrington, PA 18976
United States
Attn: Accounts Payable
Phone: 877-969-7246 ext 3

Duplicate Order

Order Comments:

Line #	Item #	Description	UOM	QTY	Unit Price	Line Total
1	E8520	Dell Latitude E8520 Ship To Attn: Shopper user	each	2	1,109.00 USD	2,218.00 USD
2	320-9700	Dell Professional P1913S 19" Monitor with LCD Ship To Attn: Shopper user	each	1	149.99 USD	149.99 USD
					Subtotal:	2,367.99 USD
					S & H:	0.00 USD
					Total:	2,367.99 USD

Note: Re-released orders will state "Duplicate Order."