

Converting easySourcing™ Bid to ESM Purchase™ Hosted Catalog



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Converting easySourcing™ Bid to ESM Purchase™ Hosted Catalog Process

This document provides a condensed overview of the process of converting easySourcing™ Bids to ESM Purchase™ Hosted Catalogs. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Run Report ID 74

After the bid has been Awarded, run Report ID 74 to provide information for the new Hosted Catalog.

The screenshot shows a navigation bar with tabs: prepare, distribute for requirements, requirement response, manage requirements, publish, **award**, and purchase orders. Below the tabs is a breadcrumb trail: search | contract | reports. The main section is titled 'Select Report Request' and contains a table with the following data:

Select	Report ID	Name	Description
<input type="radio"/>	70	Sourcing Event Activity Report by Create Date Range	Displays activity details on sourcing events.
<input type="radio"/>	71	Vendor Item Number Award Summary Report	Displays the items that have been awarded for the event selected.
<input checked="" type="radio"/>	74	easyPurchase Catalog Template (eSchoolMall/Mercury Version)	Displays Contents of Awarded Bid in the easyPurchase Catalog Template Format
<input type="radio"/>	75	Sourcing Summary with Diversity Information	Displays sourcing summary information for all events by date range.
<input type="radio"/>	76	Diversity Performance Report	Displays diversity performance summary information for all events by date range.
<input type="radio"/>	78	Vendor Bid Tabulation	Displays all vendor responses.
<input type="radio"/>	79	Unawarded Sourcing Report	This report will provide information on sourcing events that have been published to suppliers but have yet to be award-publ

Below the table is a 'To Report ID:' dropdown menu, a 'Go' button, and 'Select' and 'Status' buttons.

Transfer Line Item Information into Template

The customer can copy and paste fields from Report 74 into a new ESM Purchase™ Hosted Catalog template. The new template can be found at the ESM Help Center (<https://support.esmsolutions.com/hc/en-us>). Some fields may be required in the Hosted Catalog that were not required in the bid. When applicable, the customer can use N/A for empty required fields.

	A	B	C	D	E	F	G	H	I
1	easyPurchase Catalog Template (eSchoolMall/Mercury Version)								
2	eSchoolMall Demo Environment								
3	Purchasing Entity:	Thorr University							
4	Bid ID:	1							
5	Description:	School Supplies							
6	Category:	IT							
7	Run Date:	06/14/2016 11:02 AM							
8									
9	Vendor #	Vendor's Item Number	Product Name	Price	Unit of Measure	Product Picture	Product Description	Manufacturer Name	Manufacturer Number
10	VR4033648	3809504	Laptop	60.0000	5 - 10.0000 Count Containers			Dell	029
11	VR4033647	2	Cable	12.0000	30 - 20.0000 Count Crates			Dell	456
12									
13									
14									

If the Bid is Awarded to multiple Suppliers, the customer needs to create a different Hosted Catalog for each Supplier. The UOM can be adjusted to reflect a better shopping experience, i.e. 5 – 10.0000 Count Containers = 50 Count Containers. The Contract Price/ List Price and the Item/Service/ Description can be the same data if needed.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Template	1.3										
2	Hosted Catalog Template											
3												
4	All fields marked with (*) are required.											
5												
6	Status	* Catalog Item Number	* Item/Service	* Product Description	* UOM	* MFG/Provider	* MFG/Provider Part #	UPC	EAN	Supplier I	* Contract Price	* List Price
7	Char = 8	Char = 255	Char = 500	Char = 5000	Char = 32	Char = 255	Char = 255	Char = 50	Char = 50	Char = 200	Char = 12	Char = 12
8	Optional.	Required	Required	Required	Required	Required	Required	Optional	Optional	Optional	Required	Required
9		3809504	Laptop	Laptop	50 Count Containers	Dell	029				60.0000	60.0000
10												
11												

	A	B	C	D	E	F	G	H	I	J	K	L
1	Template	1.3										
2	Hosted Catalog Template											
3												
4	All fields marked with (*) are required.											
5												
6	Status	* Catalog Item Number	* Item/Service	* Product Description	* UOM	* MFG/Provider	* MFG/Provider Part #	UPC	EAN	Supplier I	* Contract Price	* List Price
7	Char = 8	Char = 255	Char = 500	Char = 5000	Char = 32	Char = 255	Char = 255	Char = 50	Char = 50	Char = 200	Char = 12	Char = 12
8	Optional.	Required	Required	Required	Required	Required	Required	Optional	Optional	Optional	Required	Required
9		2	Cable	Cable	60 Count Crates	Dell	456				12.0000	12.0000
10												
11												

Send Template(s) to ESM Support

After the Hosted Catalog template(s) are completed, the customer sends the CSV file(s) to ESM Support at support@esmsolutions.com. ESM Support uploads the template for an overnight validation process. ESM Support will confirm when the Catalog is available in the user's environment to add visibility.

New Suppliers

If the Supplier does not exist in ESM Purchase™, the customer needs to provide the Supplier's information to ESM Support. The Supplier Information can be found by selecting the Supplier Name within the Awarded Bid. The customer also needs to provide the appropriate PO email for Electronic Release.

prepare distribute for requirements requirement response manage requirements publish **award** purchase orders

search | contract | reports

Vendor Summary

Event Information
ID: 1
Description: School Su
Creator: Brittany T
Due Date: 5/21/2015
Sealed Until: 5/21/2015
Awarded: 5/26/2015
Queued For Convert: 8/25/2015
Converted: 8/26/2015

Responses

Vendor A	Compliant	Lowest Bidder
AC Books Test	<input checked="" type="checkbox"/>	0 (0%)
Brenden's Business <small>(412)955-1212 Perkasie, PA</small>	<input checked="" type="checkbox"/>	0 (0%)
View Notes And Attachments		
Sean's Supply <small>O'Neill, Sean (570)985-2323 Salersburg, PA</small>	<input checked="" type="checkbox"/>	1 (50%)
Thorr Supplies ←	<input checked="" type="checkbox"/>	1 (50%)
View Notes And Attachments		

Updated: 8/26/2015 4:00:17 AM
Updated By: [Brittany Thorrington](#)
Attachment Files: No attachments specified.

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

Response Contact Information - Google Chrome
<https://sales.eschoolmall.com/App/Award/ResponseCo>
Response Contact Information
Vendor Name: Thorr Supplies
Response Number: 8326
Contact Name: [Brittany Thorrington](#)
Address 1: [1280 N 10th Street](#)
City, State Zip: [Warrington, PA 18980](#)
Email: [bthorrington@thorr.com](#)
Phone: [\(267\)221-6877](#)
[Close](#)