**THE MARKETPLACE USERS GUIDE**

**ABOUT THE MARKETPLACE AND ESM SOLUTIONS**

ESM Solutions is an Internet-based eProcurement tool that Wellesley College has implemented to create a vendor Marketplace. It securely links Wellesley College users to our preferred suppliers. Each user is able to log on to the Marketplace via ESM Solutions and have access to suppliers online catalogs, while only maintaining one username/password and one user profile. ESM Solutions will maintain each user's profile information including shipping addresses.

**LOGON**

1. Go to <https://eprocurement.esmsolutions.com/?me=wellesley>
2. Enter your User ID (Wellesley College email address) and Password

**HOME PAGE**

The Home Page provides you with important messages as well as direct links to preferred suppliers. You are able to identify suppliers by their logo.

When you click on a supplier's logo, you will be directed to the supplier's online catalog. During this connection, information is transmitted from the Marketplace to the supplier. The information that is transmitted will identify who you are and what organization you are coming from. Wellesley College pricing will be displayed.

**Note:** Once you click on a supplier logo you will be directed to the supplier's online catalog. At this point you are no longer on the Marketplace - to return you must follow the supplier's checkout process.

**PAYMENT INFORMATION**

Payment is handled by ProCard. Charges will appear on each users Wells Fargo statements where they will enter the expense descriptions and reallocate to a different budget number if necessary.

**CREATING AN ORDER**

1. Click the supplier logo to go directly to the supplier's online catalog.
2. Edit the browsers pop-up blocker to allow pop-ups from https://eprocurement.esmsolutions.com
3. Follow the supplier's instructions for selecting items.
4. After you have finished selecting all of your items, proceed with the supplier's checkout process. Once you have completed their checkout process, you will be directed back to the Marketplace Shop Page.

**Note:** The number of items you have selected for purchase will now appear in your Marketplace “Cart” tab on the homepage next to the “Shop” tab.

1. You may continue shopping through different supplier’s online catalogs at this time or you may proceed to the Marketplace “Cart” to begin the checkout process in the Marketplace.

**Note:** If you log out your items will be saved in your Marketplace Cart.

**CART IN THE MARKETPLACE**

The Cart Page in the Marketplace displays all of the items you have selected from the suppliers.

**Converting the Marketplace Cart to Checkout:**

1. If all of the information is correct on the Marketplace Cart Page, click the “Continue” button next to “Convert Cart to # transaction(s)”.

**Note:** If you have items listed from more than one supplier, ESM will automatically split those items into different transactions.

1. On the following page, users must choose a Department from the available drop-down list and then click “Update”.

**Note:** If the department is left as “Unassigned” there will be an “Alert” listed next to System Note prompting you to choose a valid department.

1. The Next Step should display “Prepare CC Order”.

**Note:** If it displays “Update Transaction” there is still information missing that must be entered before checking out.

1. Once the department information is updated the Next Step should display “Validate”. Click “Validate”.

**Note:** The triangle next to the Transaction # will show you item detail information. You can still update the quantities or delete items on this page. You will need to “Update” and “Validate” any changes that you make.

1. If you log out at this point you will need to click on the Marketplace Checkout tab and search for “Waiting” orders to return to this page.
2. If you would like to delete the whole order at this point please select “Delete” under Next Step.
3. If you would like to change the shipping information please enter the name and room number of the person receiving the order in the “Ship To – Attn:” field. Click on the triangle next to the Transaction # and scroll down to the bottom of the order to find the Ship To address. Click “Edit” next to the Ship To address and search for the correct Location.

**Note:** Any changes will change the Next Step to “Validate”.

1. If you are ready to proceed with check out click “Prepare”.
2. Update or verify the “Name on Card”, “Contact Phone Number”, “Card Type”, “Card #”, and “Expiration Date”.

**Note:** Every field besides “Card #” will be stored and will auto-populate the next time you are preparing your credit card order.

1. Click “Continue” and “Place Order”. Note: If you would like to view this order history go to the Checkout Page and change the Selection to “Submitted”.

**PROFILE INFORMATION**

Each user may manually edit their shipping information. Each profile currently has a default building as well as a default room location (listed under the Ship To- Attn field). When you are converting a Cart to Checkout you may modify the Ship To location by clicking the triangle next to the Transaction # to view the item detail, shipping location, and billing information. You can click “Edit” next to the Ship To location and search for a different location. You may manually type into the Ship To-Attn field to change the room number.

Note: If you need to make permanent changes to any of the information in your profile, please contact Jackie Cheng (x-2471, jcheng2@wellesley.edu) or Tina Dolan x-3501, cdolan@wellesley.edu).

**EMAIL NOTIFICATIONS**

The Marketplace will send you an automatic email for each order you place, and for orders that have been sent for approval. We believe this notification is helpful but you may want to create an email filter so you can manage these emails more efficiently. To create a filter:

**CLICK ON GOOGLE MAIL**

**CLICK ON LINK TO CREATE A FILTER**

**FILL OUT THE FORM**

FROM: noreply@esmsolutions.com

TO: you@wellesley.edu

CLICK button for next step

**CHOOSE ACTION**

Check the desired boxes\*:

Skip the Inbox

Mark as read

Star it

Apply the label

Forward it

Delete it

\*Suggested: Skip the Inbox and Apply the label

**CHOOSE A LABEL**

Use "Apply the label" drop-down menu to choose "New label"

Type "Marketplace" in the text field

Click "Create"

**YOUR NEW FILTER**

Will automatically send emails generated by orders in the Wellesley Marketplace to the label you created. You can find your Marketplace emails by looking in the list of labels at the left edge of your Gmail screen.

**PRODUCT RETURNS**

Contact the Supplier to arrange for any product returns. If you have any questions, please contact Jackie Cheng (x-2471, jcheng2@wellesley.edu) or Tina Dolan x-3501, cdolan@wellesley.edu).

**LOGOUT**

Clicking **Log Out** located at the upper right will end your session on the Marketplace.