

# Marketplace Quick Reference

## Minnesota State eProcurement System

### Need Help?

Questions regarding Marketplace? Please contact your specific institution business office.

To submit a ticket regarding Marketplace at the system office, send an email to the following email address:

[SO-marketplace@minnstate.edu](mailto:SO-marketplace@minnstate.edu)

Please include any related screen shot(s), purchase order number(s), requisition number(s) and/or invoice number(s) in your submitted ticket).

Login To Marketplace: At Employee Home, Click **Purchasing** under Administrative Applications, then click on **Minnesota State Marketplace**.

This will display the Marketplace login screen.

The screenshot shows the Minnesota State Marketplace homepage. A dark sidebar on the left contains navigation icons. The main header includes the Minnesota State Marketplace logo, a user profile dropdown for Daniel Duffy, a notification bell with 61 alerts, a shopping cart with 8.85 USD, and a search bar. Below the header is a breadcrumb trail: Shop > Shopping > Shopping Home > Home/Shop. A search bar is set to 'Everything' with a 'Go' button. Navigation links include 'Go to: advanced search | favorites | forms | non-catalog item | quick order' and 'Browse: vendors | categories | contracts | chemicals'. A 'Forms' section contains 'Blanket Order' and 'Payment Request' buttons. An 'Office Supplies' section is partially visible. A 'Logout' button is in the top right. Three callout boxes highlight: 'Easy slide out menu' (pointing to the sidebar), 'Breadcrumb Navigation' (pointing to the breadcrumb trail), and 'Banner Provides easy access to your profile, approvals, system notifications, shopping cart and quick search' (pointing to the top navigation area).

### Manage your Profile: Click your name in Banner, Click **View My Profile**

UPDATE PERSONAL INFORMATION: Name, Phone, Email Address

- Click **User Name, Phone Number, Email**
- Review/edit User Identification
- Click **Save** button

ADD SHIPPING AND BILL TO ADDRESS: Multiple shipping addresses and billing addresses can be stored

- Click **Order Preferences**
- Click **Shipping or Billing Addresses**
- Click **Select Addresses for Profile** button
- Click the **Select Address** and select the address
- If default address, **check default** and....

Click **Save**

ADD CUSTOM FIELD AND ACCOUNTING CODE DEFAULTS: Multiple accounting codes can be stored

- Click **Order Preferences**
- Click **code favorites**
- Click **Add** to add codes with RC\_ID, cost center and year
- Nickname – cost center and nickname is helpful
- If default accounting code, **check default** and....

Click **Save**

# Marketplace Quick Reference Guide

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<u>Add Items to Shopping Cart</u>	<u>Checkout</u>	<u>Document Search</u>
<p><b><u>HOSTED CATALOGS</u></b></p> <ul style="list-style-type: none"> <li>From Home page, Shop</li> <li>Use quick search text box then click Search</li> <li>Or Browse by Supplier, Category, etc.</li> <li>Click <b>Add to Cart</b> button</li> <li>Follow Checkout instructions</li> </ul> <p><b><u>NON-CATALOG ITEM</u></b></p> <ul style="list-style-type: none"> <li>From Home page, click <b>Non-Catalog Item</b></li> <li>Enter <b>Supplier name</b></li> <li><b>Select</b> the appropriate supplier</li> <li>Enter product information, commodity codes and any environmental boxes</li> <li>Click <b>Save and Close</b> for a single item from this supplier</li> <li>Click <b>Save and Add Another</b> for multiple items from the same supplier</li> <li>Follow Checkout instructions</li> </ul> <p><b><u>EXTERNAL CATALOGS (PUNCHOUT)</u></b></p> <ul style="list-style-type: none"> <li>From Home page</li> <li>External Catalogs section, click <b>supplier's icon</b> to access external catalog</li> <li>Search in supplier's catalog for items and add to supplier's shopping cart</li> <li>Confirm order in supplier's site to return item(s) to SciQuest shopping cart</li> <li>Follow Checkout instructions</li> </ul> <p><b><u>BLANKET ORDER</u></b></p> <ul style="list-style-type: none"> <li>From Home page, click <b>Blanket Order</b></li> <li>Enter <b>Supplier name</b></li> <li><b>Select</b> the appropriate supplier</li> <li>Enter <b>product information</b></li> <li><b>Select</b> dates</li> <li>Select <b>Add and go to Cart</b> and click <b>Go</b></li> <li>Select <b>Add to Cart and Return</b> then click <b>Go</b> for multiple items from the same supplier</li> <li>Follow Checkout instructions</li> </ul> <p><b><u>PAYMENT REQUEST</u></b></p> <ul style="list-style-type: none"> <li>From Home page, click <b>Payment Request</b></li> <li>Enter information including invoice number.</li> <li>You will be required to upload the invoice and enter commodity code.</li> <li>Select <b>Add and go to Cart</b> and click <b>Go</b></li> <li>Follow Checkout instructions</li> </ul>	<p>The Draft Requisition - Final Review screen will be displayed</p> <p><b><u>ADD/CHANGE INITIATOR</u></b></p> <ul style="list-style-type: none"> <li>In Authorizations Section, click <b>edit</b> button next to Initiated By</li> <li>Click <b>Select from profile values</b> or <b>Select from all values</b></li> <li><b>Enter search criteria</b></li> <li>Click <b>Search</b> button</li> <li>Click <b>Select</b></li> <li>Click <b>Save</b> button</li> </ul> <p><b><u>ADD/CHANGE APPROVER</u></b></p> <ul style="list-style-type: none"> <li>In Authorizations Section, click <b>edit</b> button next to Approved By</li> <li>Click <b>Select from profile values</b> or <b>Search for an approver</b></li> <li><b>Enter search criteria</b></li> <li>Click <b>Search</b> button</li> <li>Click <b>Select</b></li> <li>Click <b>Save</b> button</li> </ul> <p><b><u>CHECK YOUR SHIPPING ADDRESS</u></b></p> <ul style="list-style-type: none"> <li>Select Receiving Location or Direct Delivery Address</li> <li>Verify/Add Dept, Building/Room #, Attention, Contact Phone</li> </ul> <p><b><u>CHANGE/SPLIT CHARGING INSTRUCTIONS</u></b></p> <p><u>To edit charging for all line items:</u></p> <ul style="list-style-type: none"> <li>In Charging Instructions section, Click <b>edit</b> button in the right hand corner (continue with General Instructions)</li> </ul> <p style="text-align: center;"><b>-OR-</b></p> <p><u>To edit charging for individual line items:</u></p> <ul style="list-style-type: none"> <li>In Charging Instruction section, Click <b>View/edit by line item</b></li> <li>Click <b>edit</b> button on line (continue with General Instructions) <u>General Instructions:</u></li> </ul> <p><u>To split charges:</u></p> <ul style="list-style-type: none"> <li>Click <b>add split</b> link (repeat as required)</li> <li>Select % of Qty from drop-down menu</li> <li>Enter <b>Amount</b> of split</li> </ul> <p><u>For all edits:</u></p> <ul style="list-style-type: none"> <li>Beneath VIP or Expenditure field, click <b>Select from profile values</b> or <b>Select from all values</b> to choose VIP or Expenditure</li> <li>Search for VIP or Expenditure by Value (VIP/Expenditure) or Description</li> <li>Click <b>Select</b> button next to appropriate value</li> <li>Click <b>Save</b> button</li> </ul>	<p><b><u>FIND AN ORDER (BY REQUISITION)</u></b></p> <ul style="list-style-type: none"> <li>Click <b>document search</b> on navigation bar</li> <li><b>Enter requisition number</b> into search box</li> <li>Click <b>Go</b> button</li> </ul> <p><b><u>VIEW APPROVAL STATUS AND HISTORY</u></b></p> <ul style="list-style-type: none"> <li>Display the Requisition on your screen</li> <li>Click <b>Requisition Approvals</b> tab for all workflow approval steps and the status of each step</li> <li>Click <b>History</b> tab for all actions taken on the requisition</li> </ul> <p style="text-align: center;"><b><u>For Approvers</u></b></p> <p>Go to <b>Orders &amp; Documents &gt; Approvals &gt; My Approvals</b></p> <p>Assigning the requisition will give the approver more options.</p> <p>Below are common functions of an approver.</p> <p><b><u>APPROVE A REQUISITION</u></b></p> <ul style="list-style-type: none"> <li>In My Approvals list, click the desired <b>Requisition No.</b> to open the requisition</li> <li>Review the items, ship to address, charging instructions and notes – edit if necessary</li> <li>Select <b>Approve/Complete Step</b> in the Available Actions drop-down menu</li> <li>Click <b>Go</b></li> </ul> <p><b><u>REJECT A REQUISITION</u></b></p> <ul style="list-style-type: none"> <li>In My Approvals list, click the desired <b>Requisition No.</b> to open the requisition</li> <li>Select <b>Reject Requisition</b> from the Available Actions drop-down menu</li> <li>Click <b>Go</b></li> <li>Reject Requisition box appears - <b>type in your reason</b></li> <li>Click <b>Reject Requisition</b> button</li> </ul> <p><b><u>RETURN A REQUISITION</u></b></p> <ul style="list-style-type: none"> <li>In My Approvals list, click the desired <b>Requisition No.</b> to open the requisition</li> <li>Select <b>Return to Requisitioner</b> in the action drop-down menu • Click <b>Go</b></li> <li>Return to Requisitioner Reason box appears - <b>type in your reason</b></li> <li>Click <b>Return to Requisitioner</b> button</li> </ul>
<p>When all items have been added to the shopping cart, click Proceed to Checkout button</p>		