M-marketsite Browse Only User Information

Overview

This procedure details how to log in to the **Browse Only** version of M-marketsite to:

- Create a draft shopping cart

- Assign the cart electronically to the person in your unit who has system access to place the order in the M-Pathways eProcurement system.

Note: As a Browse Only user, you cannot place an order in M-marketsite.

Ⓘ Important Information

To use the **Assign a Cart** feature, you must establish your browser profile. For step-by-step instructions, see the *M-marketsite Browse Only: Browser Profile Set-up* document on the Procurement Web site at http://procurement.umich.edu/buying/buying-methods/m-marketsite.

- As the cart assigner, you may electronically withdraw (i.e., un-assign) your draft cart assignment. See the Un-assign a Cart section of this document for more information and instructions.

- After a cart has been assigned, the Assignee has the option to return the cart. A valid email address must be entered in your M-marketsite User Profile to receive the system generated email. See the Check for Returned Carts section of this document for information on how to review comments.

- If the assigned cart has not been processed after five (5) days, a reminder email will be sent to both the Cart Assigner and Assignee. The email includes:

  o A summary of carts assigned by date.

  o Key information including cart number, name, vendor, and total.
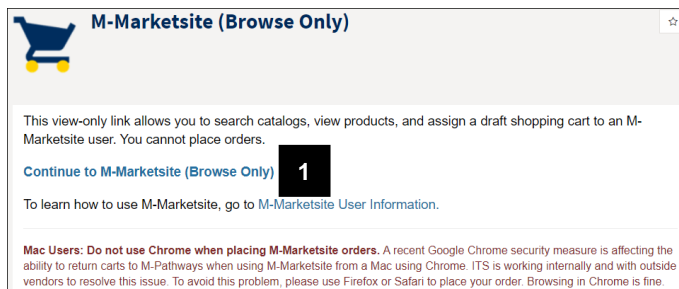
  o A link to view the cart.

Navigation

https://wolverineaccess.umich.edu/

Wolverine Access > Faculty & Staff > **M-Marketsite (Browse Only)**
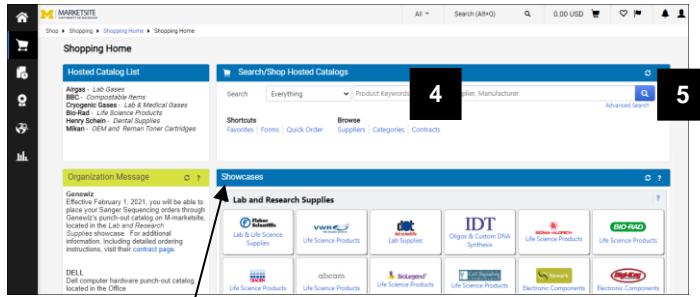
Assign a Cart

M-marketsite Browse Only Warning

Note: A system message displays to remind users that the **M-marketsite (Browse Only)** site does not allow browsers the ability to place orders.

1. Click **Continue to M-Marketsite (Browse Only)**.

2. Authenticate to the web site using your uniqname and UMICH password.

3. Click **Ok** to any system notification(s).

M-marketsite Home Page


There are two types of supplier catalogs:

- **Hosted** – suppliers provide their catalog within M-marketsite.

- **Punch-out** – link to the supplier's web site and return your selected items to your M-marketsite cart.

4. Enter search criteria in the **Search** field. Examples include:

- **Product Description** (e.g., pens)

- **Product Name** (e.g., solvent resistant black pen)

- **Part Number (SKU#)** (e.g., 1120.10)

Note: To narrow your search, select a category from the **Search** drop-down list or click a supplier button in the **Showcases** group box.

5. Click **Search**.

Search Results List
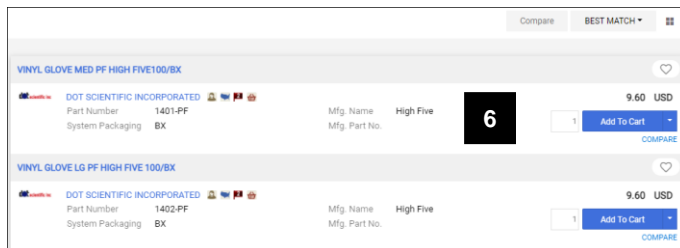
- All items matching your search criteria from a hosted catalog display in the list.

- If a punch-out supplier has a matching item, the supplier name displays with an **Order from Supplier** link to that supplier's web site.

6. Use the information in the **Search Results** list to select what you wish to order

- **Supplier Name** – below the item title

- **Supplier Classes** – icons next to the Supplier Name

- **Part Number** – beneath the Supplier Name

- **Supplier Info** – click the Supplier Name to view contact info, etc.

- **UOM** (unit of measure) – next to the price

- **Price**

- **Image** (if available from supplier)

Search Results List (continued)
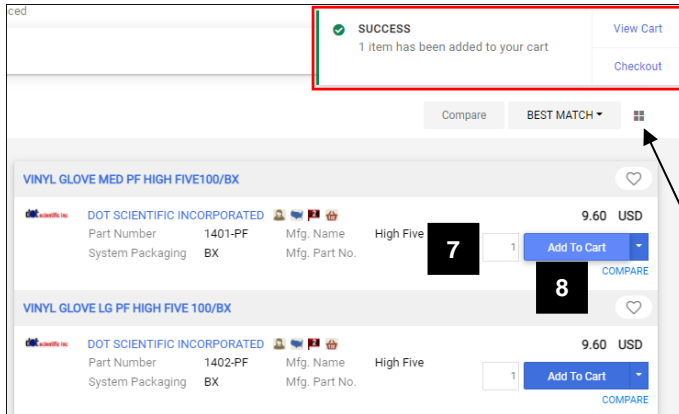
7. If applicable, change the amount to order in the **Quantity** field.

8. Click **Add to Cart** for the desired item(s).

Note: Verify that the **Success** message appears for the item. The message always says "1 item has been added..." regardless of the quantity you specified.
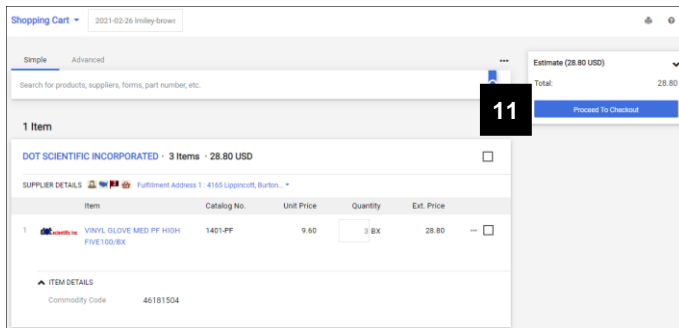
9. Repeat steps 4 – 8, as applicable.

Use the icons to switch between a list view and a grid view.

M-marketsite Home Page
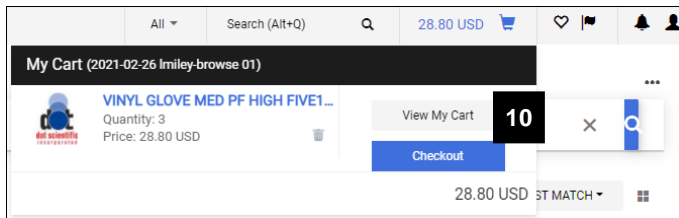
10. After you are done adding items, click the **Active Cart** link in the upper-right corner of the **Home/Shop** page > **View My Cart**.

## Active Cart – Edit Cart Sub-page

11. Verify that the contents of your cart are correct, then click **Proceed to Checkout**.

Note: Use the cart features to make changes to your cart before clicking Proceed to Checkout.

- **Continue Shopping** – using the search field

- **Update** an item's quantity

- **Remove** an item from the cart

- Add an item as a **favorite**

- **Transfer** an item to another draft cart (More Actions list)

- **Print** the draft cart for your records

Active Cart – Final Review Step
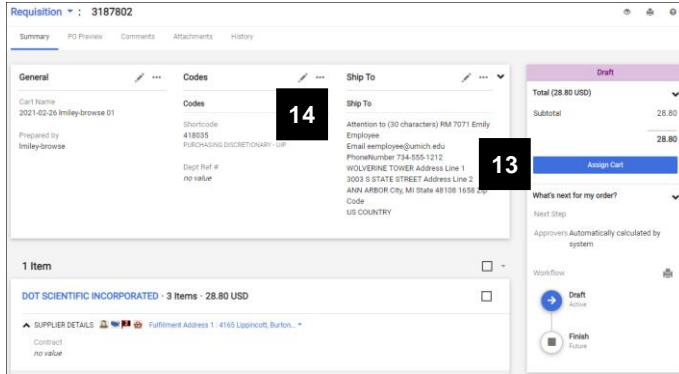
> The **ShortCode** (accounting code) and **Ship To** (delivery location code) values are required in the M-marketsite ePro requisition.
>
> As a Browse Only user, you can:
>
> - Assign the cart without entering these values. The assignee will enter them to complete the order.
>
> - Maintain these values in your browser profile. Profile defaults are automatically applied (shown above).

Assign Cart Popup
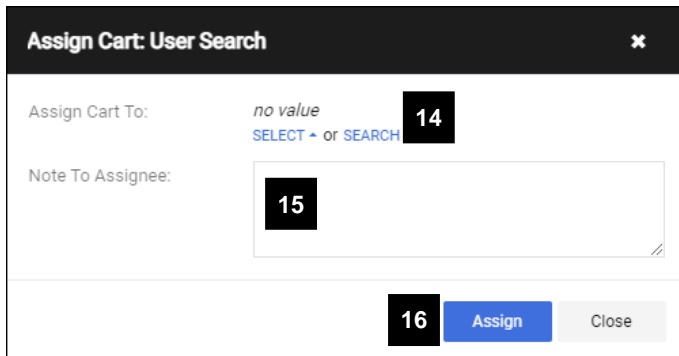
12. If applicable, click the appropriate **Edit** ✎ icon to change the following values:

    - **Codes** – to enter or change the Shortcode and/or Dept Ref #.

    - **Ship To** – to enter or change the location code for delivery. Use the following format for the **Attention to** field in the **Ship To** address: **RM # Name**.

    - **Supplier/Line Item Details** – to change the order quantity.

    Note: Clicking **Edit** opens a popup window displaying the active field(s). Enter or select the appropriate value to make your change(s), then click **Save**.

13. Click **Assign Cart**.

14. You have three options to assign a cart to an M-marketsite user:

    - If applicable, accept the preferred assignee that defaults from your browser profile.

    - Click **Select** to choose another cart assignee from your browser profile.

    - Click **Search** to enter the email address of the M-marketsite user to whom you want to send the draft cart.

15. If applicable, enter information about the order in the **Note to Assignee** field.

    Note: This information appears in the email notification that the cart assignee receives.

16. Click **Assign**.

Active Cart – Shopping Cart Information Page
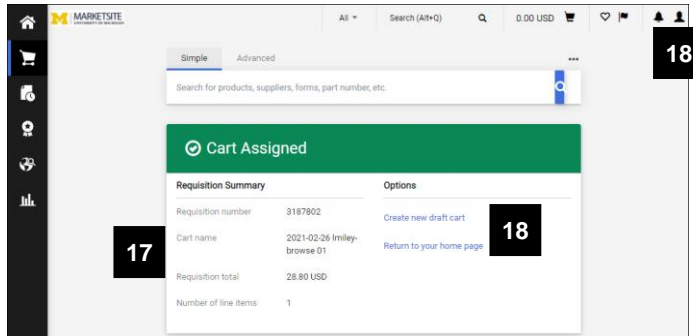
- The **Requisition number** shown here is not the official M-Pathways ePro requisition number. Use the number shown to track the order in M-marketsite (Orders & Documents menu).

- If the assignee has identified a substitute, you will see the substitute's name here.

17. Review the **Shopping Cart Information**. If applicable, record the M-marketsite **Requisition Number** for future reference.

18. Click the **User** 👤 icon in the top banner, and then click **Logout** to return to the Wolverine Access Gateway (you are still logged in to the Gateway).

or

Click one of the following links to continue working in M-marketsite:

- Create new draft cart

- Return to your home page

Un-assign a Cart

You can access a draft cart you have assigned to another person until the assignee processes the order in M-Pathways or re-assigns the cart to a third party. You can **un-assign** (electronically withdraw) a draft cart from the person to whom you've assigned it if:

- The assignee is not available to complete the order in M-Pathways.

- You wish to modify the order prior to its being completed by the assignee.

- You wish to delete the draft cart.

ⓘ Important Information

Only the cart assigner may un-assign a draft cart. You can only un-assign a cart when it is in draft status.

- When the assignee activates the cart in order to complete the order in M-Pathways, the un-assign function will no longer be available for that cart.

- When you un-assign a cart, it becomes an active cart for you to modify, re-assign, or delete as appropriate.
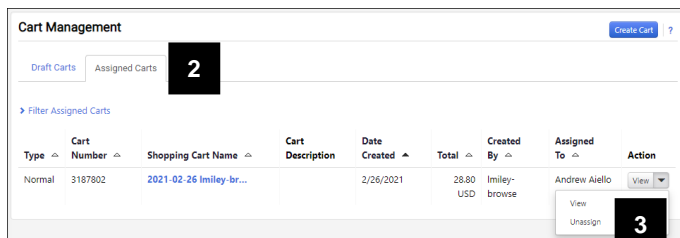
The M-marketsite system does not notify the cart assignee when you have un-assigned the draft cart.
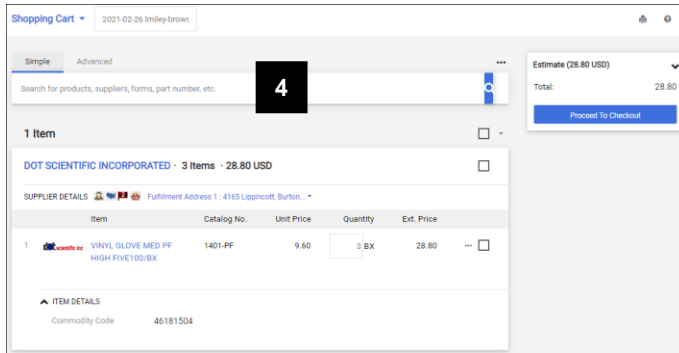
Home/Shop Page
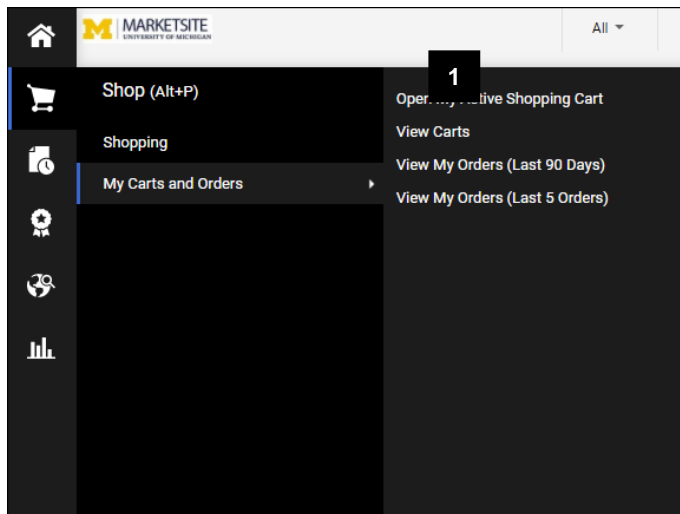
1. Click **Open My Active Shopping Cart** in the **Shop** menu.

Cart Management Page

2. Click the **Assigned Carts** tab.

3. Select **Unassign** from the **Action** drop-down list.
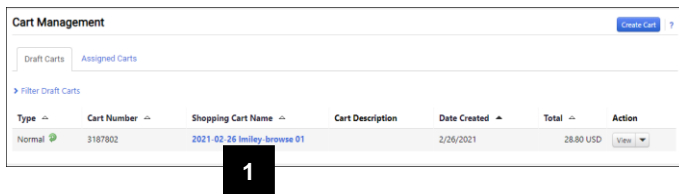
Active Cart

4. From the **Active Cart** page you may:

- Continue shopping using the search field and add items to the cart.

- Select a line and use the options in the **Perform an action on** drop-down list to modify the cart.
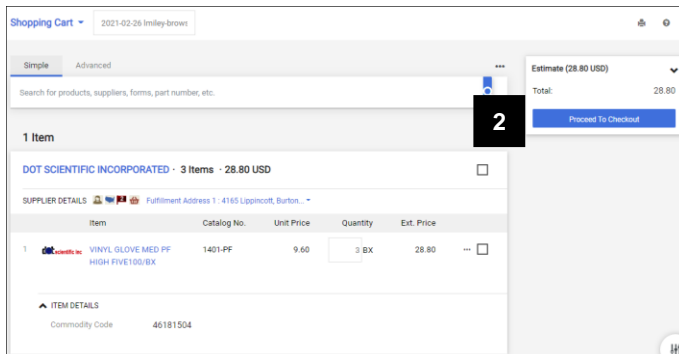
- Re-assign the cart.

Check for Returned Carts

Returned carts will display in the **Draft Carts** tab with the Returned Cart icon.
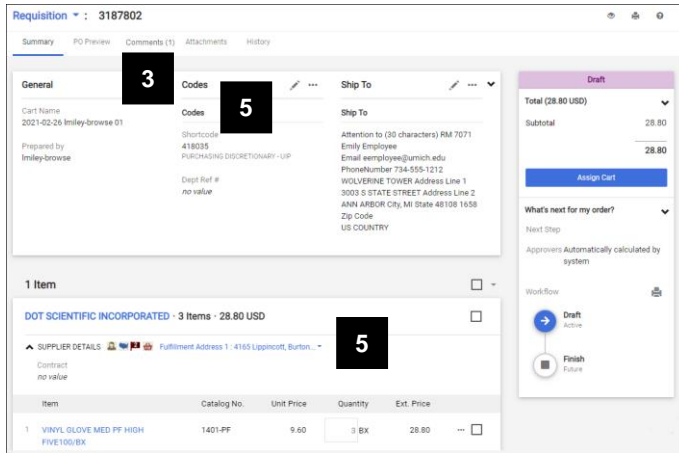
Cart Management - Draft Carts Tab

1. Click the appropriate **Shopping Cart Name** link.

Active Cart – Shopping Cart Page

2. Click **Proceed to Checkout**.

Active Cart – Final Review Page

3. Click the **Comments** tab.

4. Review the comments.

5. To make changes to the cart before re-assigning:

    -   Click the **Summary** tab to:

        o   Update codes and/or lines.

        o   Update the cart.

    -   Use the Search field to add new items.