

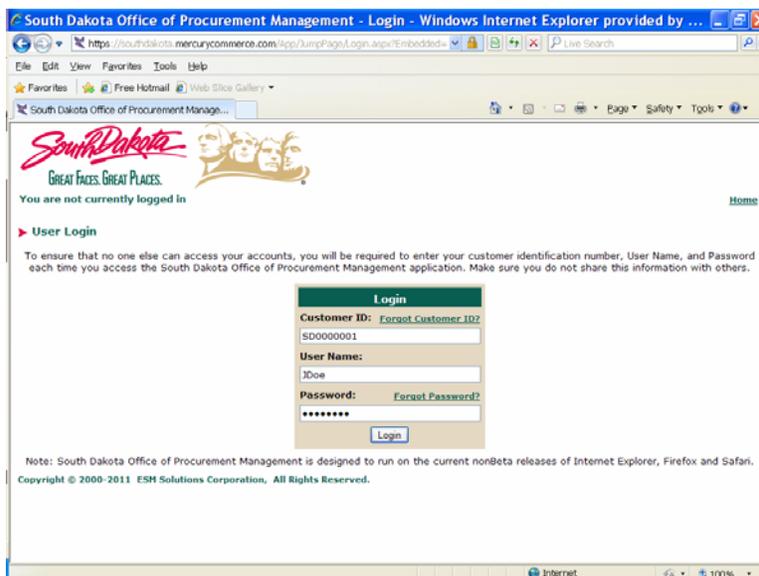
EasyPurchase OfficeMax Training

Logging into EasyPurchase:

For first time users:

- From the State of South Dakota Webpage select **Government, State Agencies, Office of Procurement Management**
- At the Office of Procurement Management webpage select **Eprocurement Login** and then **Agency Login**

You are now at the EasyPurchase User Login screen; save this page as your favorite.



The screenshot shows a web browser window titled "South Dakota Office of Procurement Management - Login - Windows Internet Explorer provided by ...". The address bar shows the URL: <https://southdakota.mercuryccommerce.com/asp/jumpPageLogin.aspx?Embedded=...>. The page features the South Dakota logo and the slogan "GREAT FACES. GREAT PLACES." Below the logo, it states "You are not currently logged in" and provides a "Home" link. A "User Login" section is highlighted with a red arrow. Below this, a message reads: "To ensure that no one else can access your accounts, you will be required to enter your customer identification number, User Name, and Password each time you access the South Dakota Office of Procurement Management application. Make sure you do not share this information with others." The login form contains the following fields: "Customer ID:" with a "Forgot Customer ID?" link and the value "SD0000001"; "User Name:" with the value "JDoe"; and "Password:" with a "Forgot Password?" link and masked characters "*****". A "Login" button is located below the password field. At the bottom of the page, a note states: "Note: South Dakota Office of Procurement Management is designed to run on the current nonBeta releases of Internet Explorer, Firefox and Safari. Copyright © 2000-2011 ESH Solutions Corporation, All Rights Reserved."

Complete the following fields:

- Customer ID: **SD0000001**
- User Name: This is case sensitive with the first initial of your first name upper cased followed by the first initial of your last name upper cased and the rest of your last name lower cased. See example above JDoe.

If your user name isn't accepted, try the first initial of your first name, upper cased followed by the next letter of your first name, lower cased, then the first initial of your last name upper cased with the rest of your last name lowered case...such as JoDoe. The reason for this is that there is another State employee...who currently has the use of the other user name. There can be no duplicates.

- Password: The initial password will be **Password** with an upper case **P**

First time users of EasyPurchase will be asked the following information:

- Authentication Code: **SD0000001**
- Current Password: **Password**
- New Password: Create a password with at least 6-8 characters followed by a 1. Your password will need to be changed every 30 days. Your new password can be the same except change the 1 to a 2. After 30 days with password 2 you can change back to password 1.
- Confirm Password:

For both current and new users:

- Select **EasyPurchase** under Solutions on the left hand side of the screen

Setting up your SD Purchasing Card

Cart/Requisition #	Name	Justification	Vendor	Total (\$)	# Items	Status	Created Date
19431			Call One, Inc	8.00	3	Unsubmitted	12/15/2011 3:42:26 PM
19430	19430 Office Supplies-Calendar		OfficeMax, Inc. (Punch Out)	261.44	4	Unsubmitted	12/15/2011 3:28:34 PM
19394	19394 Office Supplies-Calendar, Kimwipes		OfficeMax, Inc. (Punch Out)	259.20	4	Unsubmitted	12/15/2011 8:43:02 AM
19291			Century Business Products, Inc.	53.00	3	Unsubmitted	12/13/2011 11:22:36 AM

- Go to **User Preferences**; right-hand side of screen under South Dakota Great Faces Great Places
- Select **Credit Card**; left-hand side of screen
- Select **Create**

You should now be at the Credit Card Information screen, as shown below:

South Dakota Office of Procurement Management easyPurchase - Windows Internet Explorer provid...

https://southdakota.mercurymcommerce.com/secure/default.asp?Tab=Requisition&A...

Kathy Stasch for State of South Dakota

easyPurchase

card/requisition approval purchase orders receive system settings

summary | reports

Credit Card Information

*Card Nickname: John

*Credit Card Type: MasterCard

*Credit Card Provider: CITIBANK NA

*Credit Card Number: 123456789101

*Expiration Date: 06 (Jun) / 2012

*Default Fund Account Number: citi-00000-00000

Name (as it appears on card): John Doe

*Address Line 1: 425 E Capitol Ave

Address Line 2:

*City: Pierre

*State / Province: South Dakota

*Postal Code: 57501

Phone: 605-773-4984 Example: (215) 555-1212

Make this your Default Card:

Complete the fields provided on the screen

- Card Nickname: is any name you want to call your card.
- Credit Card Type: Select the drop down arrow and click on **MasterCard**
- Credit Card Provider: Select the drop down arrow and click on **CITIBANK NA**
- Credit Card Number: When entering your credit card number do not add spaces or hyphens. The number is just one long line of numbers.
- Expiration Date: Enter your expiration date
- Default Fund Account Number: **citi-00000-00000**
- Name: Enter your name as it appears on the card
- Provide your Address, City, State, Postal Code & Phone number
- **DO NOT** check the box to Make this your Default Card.
- Select **Update**; then **Return**.
- Select the **Requisition** blue tab on the upper left-hand side of the screen. You should now be back at the Requisition Summary screen.

Ordering from OfficeMax Inc.

The screenshot shows the 'Cart/Requisition Search' interface. On the right side, there is a 'Quick Search' box with a 'Create:' button circled in red. Below the search box is a table of search results.

Cart/Requisition #	Name	Justification	Vendor	Total (\$)	# Items	Status	Created Date
19431			Cell One, Inc	0.00	3	Unsubmitted	12/15/2011 3:42:26 PM
19430	19430 Office Supplies-Calendar		OfficeMax, Inc. (Punch Out)	261.44	4	Unsubmitted	12/15/2011 3:26:34 PM
19328	19394 Office Supplies-Calendar, Kimsjes		OfficeMax, Inc. (Punch Out)	239.20	4	Unsubmitted	12/15/2011 8:43:02 AM
19321			Century Business Products, Inc.	53.00	3	Unsubmitted	12/13/2011 11:22:06 AM

- From the Requisition Screen select **New Cart/Requisition** on the right-hand side of the screen in the Create: box. This will take you to the Product Search-Single Vendor Requisition screen as shown below:

The screenshot shows the 'Product Search - Single Vendor Requisition' screen. The title 'Product Search - Single Vendor Requisition' is circled in red. Below the title are instructions for searching and a search form with a 'Search' button.

Product Search - Single Vendor Requisition

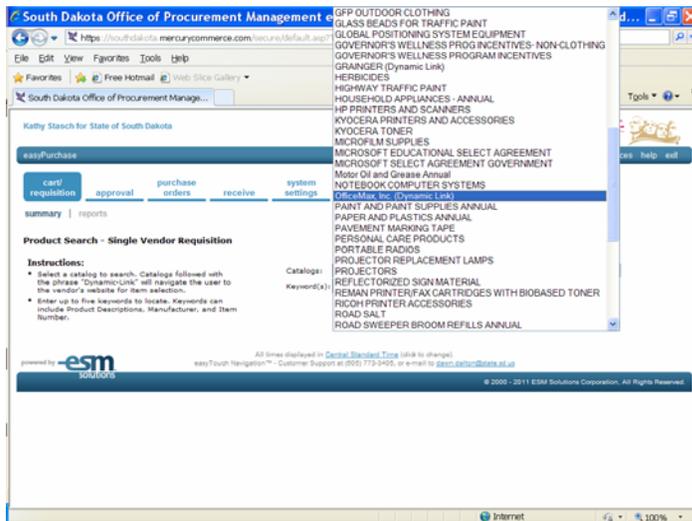
Instructions:

- Select a catalog to search. Catalogs followed with the phrase "Dynamic Link" will navigate the user to the vendor's website for item selection.
- Enter up to five keywords to locate. Keywords can include Product Descriptions, Manufacturer, and Item Number.

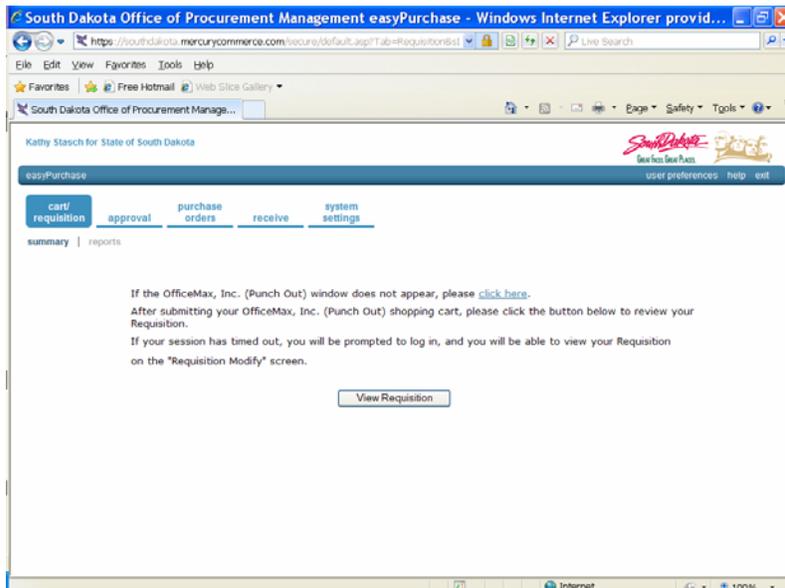
Catalogs: All Catalogs
Keyword(s):
Search Manual Item Entry

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- Click on the down arrow of the **Catalog:** drop down box; select **OfficeMax Inc (Dynamic Link)** and then **Search**.



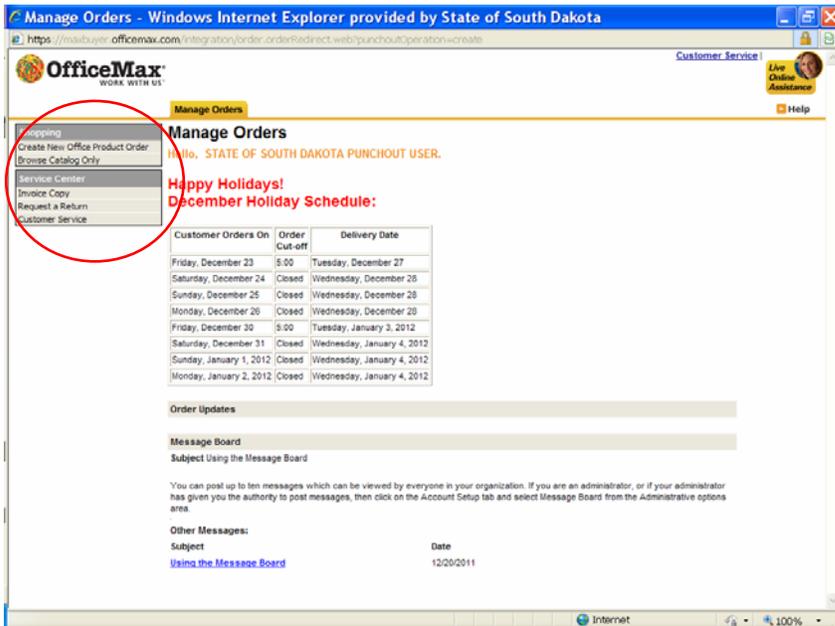
After selecting OfficeMax Inc. (Dynamic Link) the following page may appear:



If so, look at the top of your screen and see if there is a message regarding pop up screens. Right click on the message and select Always Allow. This may take you back to the beginning of the Cart/Requisition screen; just follow the previous steps and you should now be allowed in the OfficeMax Inc. webpage.

If there is no message regarding pop ups or the OfficeMax Inc. webpage did not open then select **Click Here**.

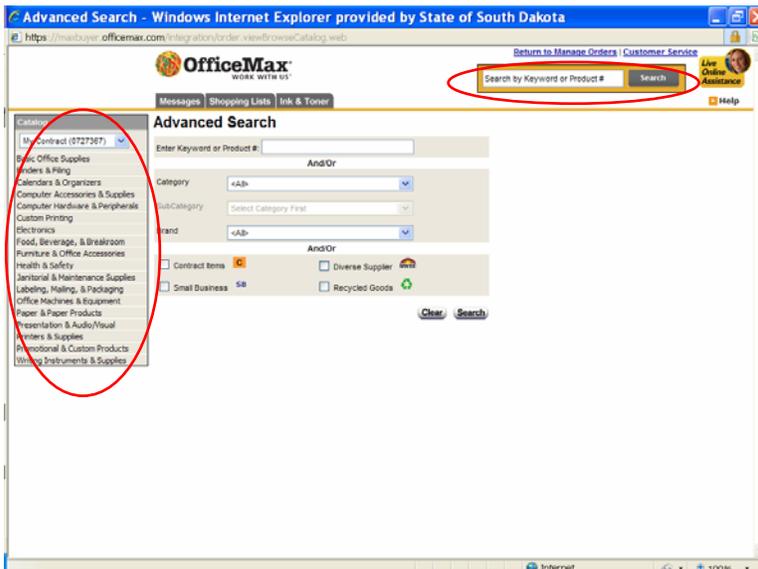
The OfficeMax webpage will now appear:



Note on the left-hand side of the screen you can Create New Office Product Order or Browse Catalog Only.

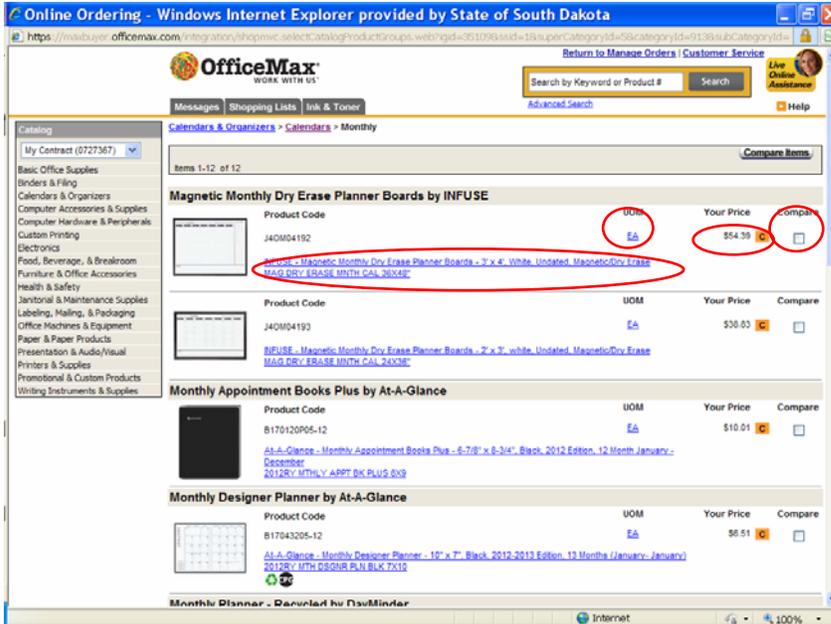
Browse Catalog Only Features:

- Click on **Browse Catalog Only** and the following screen will be displayed:



You can view items by a keyword, product and or by selecting a category from the catalog list on the left-hand side of the page.

- Select **Calendars & Organizers** from the Catalog list
- Select **Calendars**
- Select **Monthly**



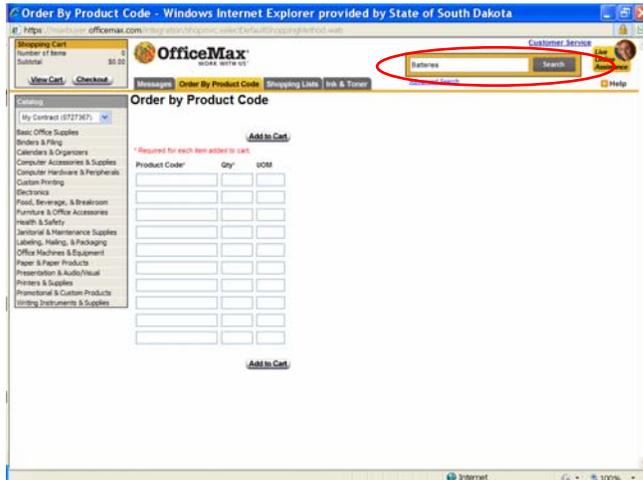
You can only view items; you can't order from this page. You can click on the description and it will open a larger screen with more of a product detail. UOM is for Unit of Measure. Be sure to note the UOM before you order; you don't want to order more than you can store. The orange C next to the price lets you know that it is a State contract price. The compare box allows you to compare products side by side. Just click in the boxes you want to compare and select Compare Items. You can send the comparison by email to an employee; they can make a selection and then you can order it.

Create New Office Product Order

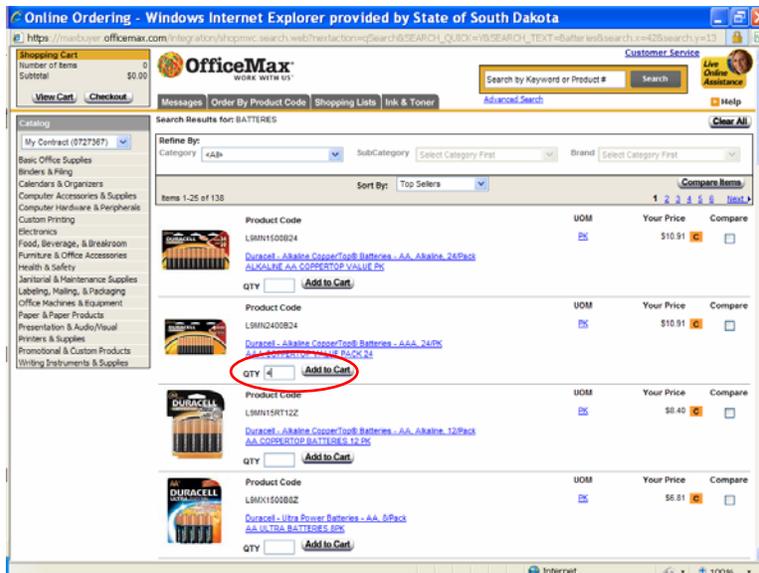
- Select **Create New Office Product Order**

You can select products by using the Catalog box on the left-hand side of the screen or you can search for items by using the Search box by providing a keyword or product code.

- In the **Search** box type **Batteries** and select **Search**

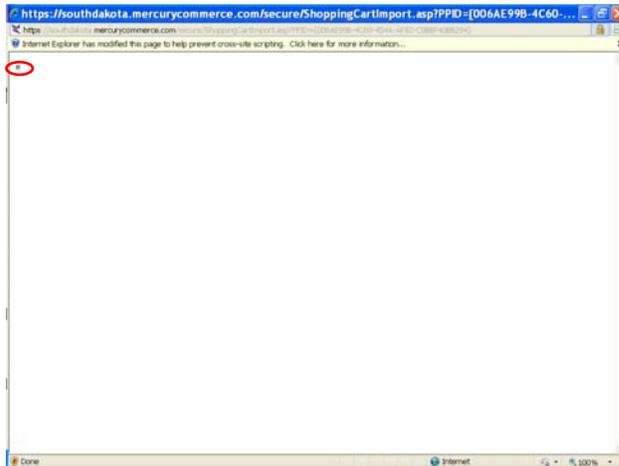


- Find and select the battery you wish to order. Put the number you wish to order in the **Qty** box and then select **Add to Cart**.



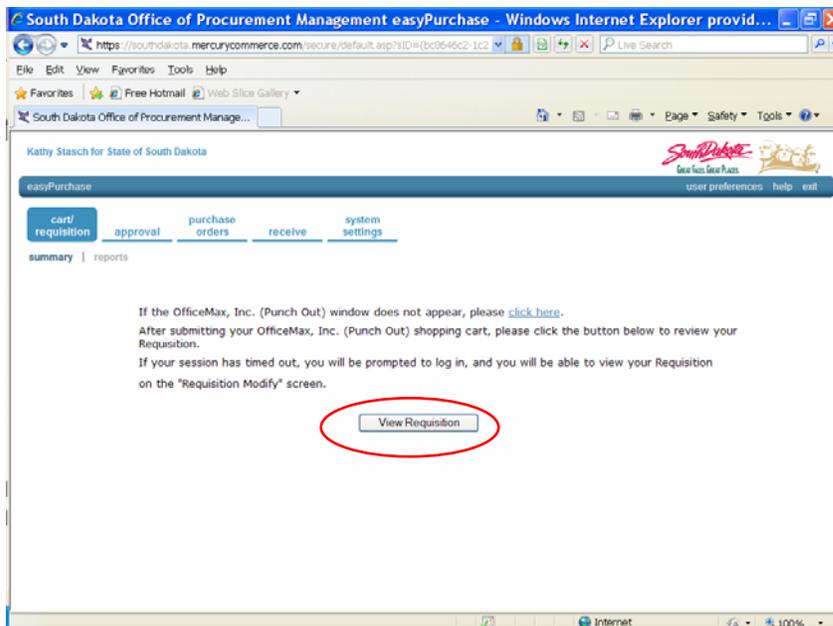
- Select **Checkout**

Some EasyPurchase users are receiving a blank page with a “#” on it when the shopping cart transfers from the punch-out catalog back into EasyPurchase. The following are the directions you can follow to remove that “#”.



- Open Internet Explorer, from the “**Tools**” menu select the last item displayed titled “**Internet Options**”.
- Click on the “**Security**” tab in the “**Internet Options**” panel, and then click on the “**Custom Level**” button three quarters down the panel.
- Scroll down the list presented in the “**Security Settings – Internet Zone**” panel and locate the “**Enable XSS Filter**” option (this is almost at the end of the list). Select the “**Disable**” option, then click the “**OK**” button to close the panel and save your changes. Click the “**OK**” button on the “**Internet Options**” to close and save any changes. Close and re-start Internet Explorer.

You should now be at the following EasyPurchase screen:



- Select **View Requisition** towards the middle, bottom of the screen.

You will now be at Requisition Modify; and the battery you selected will be listed, see example below:

The screenshot shows the 'Cart/Requisition Modify' page in the easyPurchase system. The page is titled 'Cart/Requisition Modify' and is circled in red. It contains the following information:

- Cart/Requisition Number: 19567
- Vendor Name: OfficeMax, Inc. (Punch Out)
- Fiscal Date (mm/dd/yyyy): 12/20/2011
- Ship To Location: 0110131 (EM (0110131) - Procurement Management (Change))
- Approval Route: [Select One]
- Update All Account #s: [Field]
- Apply Price Discount % to All: [Field]
- Account Code: [Field]

Line Number	Product Number	Product Description	Unit Price	Override Price	Qty	Line Item Total	Remove	Notes & Alerts	Deliver To
1	L9M2400B24AA	COPPERTOP VALUE PACK 24	10.9100		4	43.64			Stasch, Kathy

Total: 43.64

The following fields will need to be filled in:

- **Requisition Name:** Provide information such as **Office Supplies-Batteries**

Note you will want to use a name that you can track when creating a report for future information.

- **Requisition Justification:** Batteries for clocks
- **Ship To Location:** Is the default location code for your office.

Note you can change the Ship To Location by clicking on (Change). In the Location Name put in your abbreviated office name or the ship to code such as 2900 or OAG for Office of Attorney General. Select the address and click Submit.

- **Approval Route:** Be sure the approval route is selected to be **PCard Purchases**
- **Credit Card:** This will state None or the nickname of your credit card; Select the **nickname of the credit card**.
- Click on **Save**; you should see your default fund account code (citi-00000-00000) now in the Account Code field underneath the line item of the battery you are ordering.

Adding more items to the current Requisition

- Select **Add Items**.
- Select **OfficeMax Inc. (Dynamic Link)** catalog and **Search**.

Continue ordering as you did before in the OfficeMax catalog.

- After you have selected your products select **Checkout**

- Select **View Requisition** and you will be taken back to the current requisition. The requisition will now include the additional items you selected.

Double check that you have selected the correct approval route and credit card name. If the requisition is going to fail these are the two fields that haven't been properly selected.

- When all the required fields listed above have been filled out click **Submit for Approval**.

After selecting Submit for Approval you will receive a confirmation email from OfficeMax.

Confirmation in EasyPurchase

- Select the **Cart/Requisition** blue tab
- Look below **Search Results**.
- Locate your **Requisition #** listed under the 1st column named Cart/Requisition #.
- Look to the right-hand side of the screen to the column named **Status** and it will state whether your requisition was un-submitted, submitted, or completed.

If you have questions, feel free to call Kathy Stasch at 773-6877.