



ESM Purchase™ Transfer Cart Reference Guide – New User Interface



Table of Contents

ESM Purchase™ Transfer Cart Process	3
Shop	3
Cart	5

ESM Purchase™ Transfer Cart Process

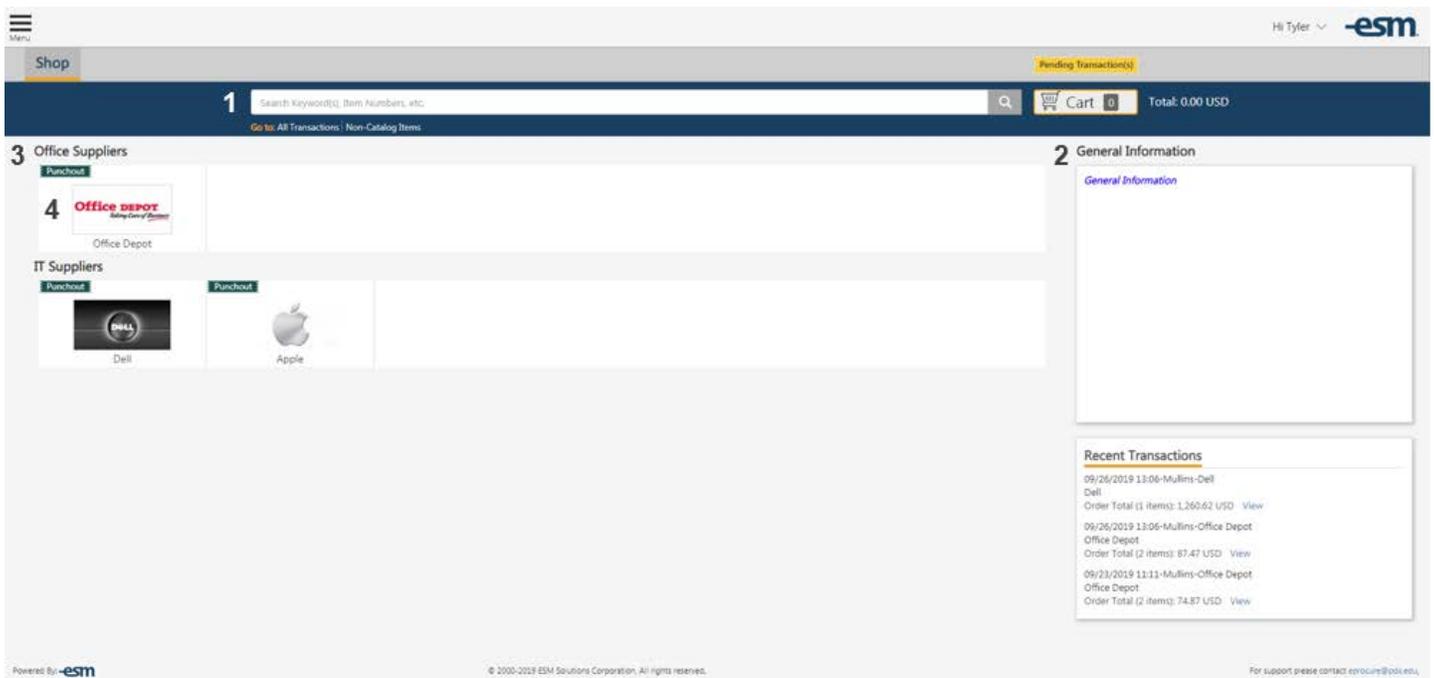
This document provides a condensed overview of the ESM Purchase™ Transfer Cart Process. It will demonstrate with short text descriptions supported by screen shots for each step explained.

Shop

The Transfer Cart User can select various items from assigned catalogs. There are two types of catalogs: PunchOut and Hosted. A Hosted Catalog contains items that are uploaded into ESM Purchase, and a PunchOut Catalog opens a customized version of the Supplier's website

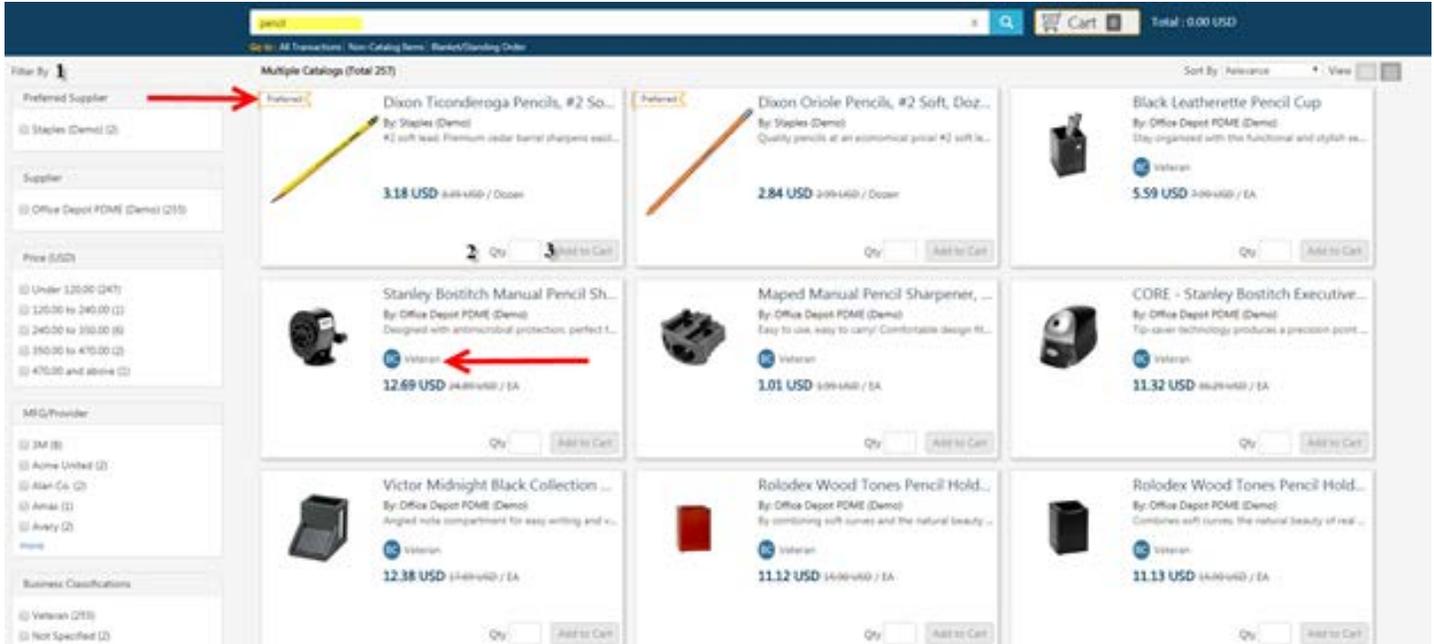
Currently Portland State University's ESM Solution, ePSU Marketplace, only utilizes PunchOut Catalogs.

If a user opens multiple PunchOut catalog session from the Shop page, each session will open in a separate browser window.



1. Search Items: Search for items from assigned catalogs
2. Information Box: Entity-wide material determined by Sys Admin
3. Category: Header to group catalogs
4. Catalog: Icon for easy access to assigned catalogs

The Transfer Cart User can select a catalog or search for items. The System Administrator may have denoted a supplier as preferred or with a business classification, which will appear in the search results.



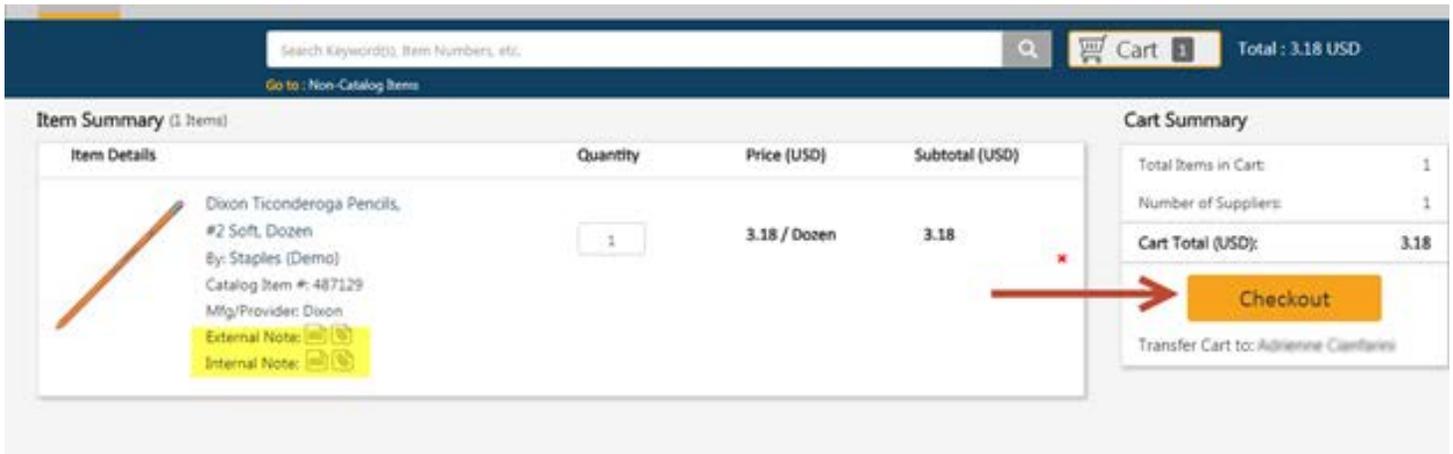
1. Filter By: Criteria to narrow down Shopping Results
2. Qty: Desired quantity for transaction
3. Add to Cart: Select when all quantities are completed

After selecting 'Add to Cart', the total quantity of item(s) and price is listed behind the **Cart**. The Transfer Cart User can continue to **Shop**, or go to their **Cart** by selecting either the **Cart** or **View Cart** toastr message indicated below.

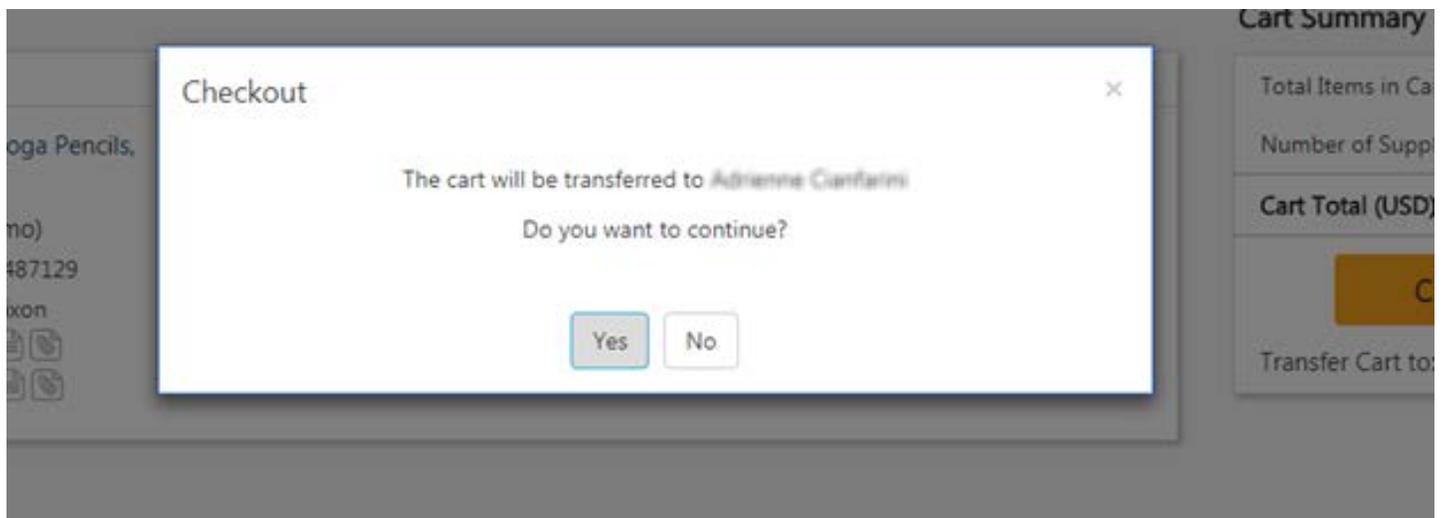


Cart

The Transfer Cart User can edit the quantity or delete items. Then, transfer the cart to a default user by selecting **Checkout**. More than one transaction is created if the items are from multiple Suppliers. The Transfer Cart user may be able to select a different user to transfer the cart to based on configuration and permissions.



Confirm the transfer by Selecting **Yes**.



The Requester will receive an email notification when the cart is transferred. The Requester will then continue the **Checkout** process, as outlined in our **ESM Purchase Requester Reference Guide**.

If a Transaction is Deleted, an Email Notification will be sent to the Transfer Cart User.