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Beginning at the eMarket Portal web page, users may click on the “eMarket Portal Login” on the tool bar located on the right side and use single sign on to access the eMarket.

1. Double click on the WB Mason icon.
   - If the website does not proceed to the WB Mason website within about 5 to 20 seconds, please disable your popup blocker and resubmit the request.

   a) For Dell computers, the notice appears similar to the yellow highlighted message below. Choose ‘Options” on the upper right, then “Allow popups for eprocurement.esmsolutions.com.
   b) For Apple computers, the error is noted in the upper right hand of the screen.
2. Search for desired item. For copy paper, click on “Paper”

- Enter desired quantity; click “add to cart”

- To proceed with the order in WB Mason’s website, we have the following choices to close the dialogue box:
  - Continue to checkout
  - Continue shopping
  - Close (upper right corner)
3. Note order has passed from the supplier’s website into the eMarket Portal interface. If details are accurate, click on the word ‘Checkout’ to continue with the order.
4. Customizing your order details
   a) **External notes** will appear on the face of the PO and is a message intended for the supplier.
   b) **External attachment** is an attachment that is intended for the supplier and will be included with the PO in the email to the supplier. This will be sent automatically, by the eMarket Portal software when placing a non-catalog order. The external attachment works for non-catalog orders (does not function for punch-out catalogs). Individuals may add more than one attachment to the transaction.
   c) **Internal note** is a message intended for your own reference and will be retained with the software and is not sent to the supplier.
   d) **Internal attachment** is an attachment for your own reference and will be retained with the PO however this attachment will not be sent to the supplier.
   e) **Work Order** - a reportable field that may be used for any pertinent data.
   f) **Category/Course** - a reportable field that may be used for any pertinent data.
   g) **Index Code** – This choice provides a means to create GL code favorites, view code descriptions, and split the costs between departments codes.
   h) **GL Account Code** – Contains GL code favorites (without descriptions)
i) Add accounting codes using Index

- Choose "Index Code" to complete FOAPAL accounting code for order.
- Enter org/department code in the section marked "Index" and click on the blue number. Note below how the fund, org, and program codes sections fill in automatically.
- Add an expense account before completing (Activity and location codes are optional)
- Click 'update'
j) Users may click ‘Apply” at this time or split the expense by repeating the above process and adjusting the split by percentage or cost.
k) Choose ‘Apply” when coding is completed.

5. Creating favorites
   a) To create a favorite (a FOAPAL string accounting code that the system will remember for future use), leave the “favorite” box checked. Click “Apply.”
   b) If you choose not to create a favorite, simply uncheck the box and click “Apply.”

6. Click on the carat to see line item detail of the order
7. Requesting an order
   a) Choose ‘Validate’
   b) Choose “Request” and the order will automatically flow to an approver for authorization (except Office Basics)

8. View workflow
   a) Choose “view” to see workflow
   b) Aside from departmental customized workflows, orders will flow into a Business Office workflow to the following individuals, who will be notified of the order by email.
      - Capital Funds
         - Joe Cataldi; 610-328-8676, icatald1@swarthmore.edu
      - Grants & Restricted Funds
         - Denise Risoli, 610-328-7810, drisoli1@swarthmore.edu
      - Operating Funds
         - Beth Baksi, 610-690-2042, ebaksi1@swarthmore.edu
         - Ernest Wright, 610-957-6353, ewright3@swarthmore.edu
   c) The resulting Purchase order will be sent directly to the supplier by email.