

Buyer's Guide

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Logging In

1. Open your web browser.
2. In the address field, type:
3. <https://lehigh.unimarket.com>
4. The login page will appear.
5. Enter your Lehigh user name and password. Press Enter or click Login.
6. The Unimarket home page will appear.

If you experience any issues logging in, please contact Jacquelyn Febbo at 8-2987 or by email at inepro@lehigh.edu.

Key Concepts

- There are two types of suppliers found in Unimarket:
 - **Premium Supplier** – supplier who has a hosted catalog on the Unimarket website or provides roundtrip/punchout access to their site from Unimarket. Premium supplier also benefit from Unimarket by being integrated to their supply chain management and financial system so the orders and invoices are feed electronically.
 - **Non-Catalog Supplier (Registered or Lite)** – supplier who have a login and can update their information and see transactions but only allow the option for users to enter the line items as non-catalog items on Unimarket.
- Products to be ordered from a supplier can be accessed in one of three methods:
 -  **Catalog** – supplier products are “hosted” on the Unimarket website, meaning you do not leave the Unimarket website to search and order these products. Hosted Catalogs are identified with the folder icon.
 -  **Roundtrip/Punchout** – supplier products are found on the suppliers’ website with a direct link to and from Unimarket. Roundtrip/Punchout functionality will be identified with the globe icon. A new window or tab will be opened and you will be signed into the TC account on the supplier’s ecommerce site
 -  **Manual** – products requiring information to be entered manually. Even Premium Suppliers could have products that are entered manually if a product is not found in any of their catalogs. The manual order option will be identified with the paper and pencil icon.

Searching

Products or Suppliers can be located by searching the loaded catalogs of suppliers using the search options detailed below.

Product Searching

Product searches can be completed using the search function in the title section of Unimarket. Only the loaded catalogs of premium suppliers will be searched. To search in this method, complete the steps listed below:

1. From the title section, type the product name, key words or Supplier Name in the search field.




2. Click **Search**.
3. Any products and suppliers that match the criteria will appear in the search results.

Searching Tips

- Search terms can be combined using the words **AND** and **OR**.
 - **AND** will search for both words/phrases.
 - **OR** will search for one word/phrase or the other.
- Wildcard searches can be performed if the exact search word/phrase is unknown.
 - **?** will replace a single character; i.e. Te?t could be Test or Text.
 - ***** will replace multiple characters; i.e. Test* could be Tester or Testing.

Advanced product searching allows the search to be narrowed by Supplier Category, Supplier, or Product Category.

1. Click the down arrow at the right side of the search bar in the search area. 
2. From the Advanced Product Search window, type the name of the product you are searching for.

NOTE: Any field marked with a red asterisk is a required field. Any time you see a blue question mark, a help bubble will appear when resting your cursor over it.
3. If desired, select a **Tag** or **Supplier** from the drop down list and/or type in or select a Product Category.
4. Click **Search**.
5. Any products that match the criteria will appear in the search results.

NOTE: Results will not return products from roundtrip suppliers unless they have additional search functionality enabled.

Supplier Searching



If you are searching for a specific supplier, there are multiple ways to locate the supplier and the product.

- From the Dashboard tab on the menu bar, click on the **Supplier icon** in the Recently Used Suppliers list of the Information Section.
- From the Dashboard, click **View all suppliers** at the bottom of the Recently Used Suppliers list of the Information Section.
- Click on the Marketplace menu or from the **Marketplace tab** on the menu bar, click **View Suppliers**.

Once you are on the Marketplace or Suppliers page you can search for the supplier by name.


Filling your Shopping Cart

Shopping by Catalog

If a catalog icon appears  or  after clicking on the supplier name or icon, you will be selecting products from the supplier's hosted catalog on Unimarket. The supplier may have multiple catalogs that appear.

1. Click on the **supplier catalog** that you wish to shop.
2. The products available within the catalog will appear.

Products and Services 3763 listings. List items per page. Sort by

	0.6 ml Thin-Wall Tubes Product Code: 2239448	Price as per Quote	Red, 1,000	<input type="button" value="Get Quote"/>
	1 ml empty Bio-Scale Mini cartridges Product Code: 7324660	\$13.99 / Each	1 ml empty Bio-Scale Mini cartridges	<input type="text" value="1"/> <input type="button" value="Add to cart"/>
	1.0 mm ID Glass Tubes Product Code: 1653136	\$13.99 / Each	6.0 mm OD, 180 mm length, 24	<input type="text" value="1"/> <input type="button" value="Add to cart"/>



3. Browse or page through the products available or use the search bar to search within the selected catalog.
4. The sort option of products defaults to Name but can be changed to Code, Lowest Price, or Highest Price.
5. Clicking on the product title or product image for more information about the product.
6. When you have decided on a product to order, type the quantity in the Quantity field to the left of the Add to cart button.

7. Click the **Add to cart** button.
8. A confirmation message will appear and the shopping cart will update to reflect the total number of products along with the dollar amount.

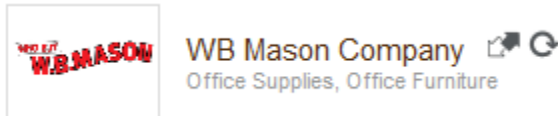


- Repeat steps #3 – 9 for as many products as you need to order from this supplier.

Shopping by Roundtrip (Punchout)

If a roundtrip icon appears  or  after clicking on the supplier name or icon, you will be sent to the supplier's website.

- Click the **supplier** that you wish to shop.
- Click the **roundtrip icon** or **supplier name** to go to the supplier's website.



- Each supplier's website will be different. Browse and search for products as if you had come to the supplier's website directly.
- Add products that you wish to purchase to your cart or order on the supplier's website by clicking the **Add button**.


NOTE: The terminology of the button to click will vary based on the supplier's website.

- When finished shopping, click the **Checkout** or **Submit Requisition button** to return to Unimarket.

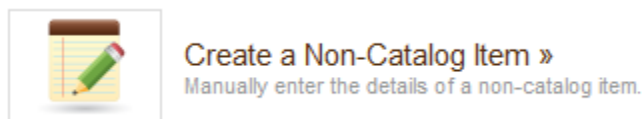
NOTE: The terminology of the button to click will vary based on the supplier's website.

- You will be returned to your shopping cart in Unimarket with the products you had selected.

Shopping by Manual Order

If a paper and pencil icon appears  after clicking on the supplier name or icon, you will need to enter all of the product information as it is not in a catalog.

- Click the **supplier** that you wish to shop.
- Click the **paper/pencil icon** or **Create a Non-Catalog Item link** to enter the products to order.



- From the Item Name field, type in the name of the product to be ordered.
- From the Item Type drop down list, select the correct **item type**.
 - The Item Type list options are custom created by the Unimarket administrators for additional information. This will not apply to all Non-Catalog items.
- Click the **Next button**.



Create a Non-Catalog Item

Lehigh University > WB Mason Company

Name ▶ Search ▶ Item Details

Item Name *

< Previous Next > Cancel 1 Add to cart

6. Any products similar to what you entered will appear on the screen. If one of these products could be ordered instead, type in the quantity and click **Add to Cart**. If the products displayed are not the same, click **Next** to continue defining the product details.
7. Type in the product information.

NOTE: Fields marked with a red asterisk are required fields.

- a. ***Name** - will be filled in from your previous entry
 - b. ***Unit of Measure** - type in the Unit of Measure or select it by clicking on the magnifying glass.
 - c. ***Unit Price** – type in the single unit price of the product.
 - d. **Description** – basic description of product.
 - e. **Product Code** - supplier’s product number or SKU.
 - f. **Category** – type in the category code or select it by starting to type a commodity and selecting from the dynamic list that will appear. These commodities are used for reporting reasons but are not required by TC at this time.
 - g. **Manufacturers Part ID** – If the supplier is a reseller, you may enter the additional product ID number that refers to the manufactures product.
8. Next to the Add to cart button, type in the quantity to be ordered.
 9. Click the **Add to cart button**.
 10. You will be returned to the product screen to enter the next product line.
Repeat steps # 3 – 9 for each product that needs to be ordered.
 11. Once all line items are entered, click on the shopping cart at the top right of the screen to begin the checkout process.



Create a Non-Catalog Item

Lehigh University > WB Mason Company

Name Search **Item Details**

Name *	<input type="text" value="Line Item 1 Test"/>
Unit Price *	<input type="text" value="\$ 13"/>
Unit of Measure *	<input type="text" value="Each"/>

Optional Details

Description	<input type="text"/>
Product Code	<input type="text"/>
Category	<input type="text"/> Browse
Manufacturer Part ID	<input type="text"/>

< Previous Next > Cancel Add to cart

Shopping Cart

As you are searching and selecting products from suppliers, the products are added to your shopping cart. The shopping cart appears in header bar. The number of products and total cost will appear.

Reviewing the Shopping Cart

1. Click the **shopping cart icon** to view the products that have been added.



2. All products in the cart will appear by supplier with an individual supplier total.
3. To adjust the quantity of any product, type the new quantity into the Quantity field of the product. The total will update as you go.
4. To remove any product from the cart, click the **red X icon** next to the Quantity field.
5. To remove all products from the cart, click **Clear Shopping Cart** in the upper right hand portion of the screen.
6. You are able to edit any of the Non-Catalog or Manual products that you have entered is you notice any incorrect information. Use the Edit button to the right of the Subtotal.

Shopping Cart

Actions: [+](#) Create Template [✖](#) Clear Shopping Cart

Cart

WB Mason Company

Product	Quantity	Price	Subtotal
<input checked="" type="checkbox"/> Line Item 1 Test	<input type="text" value="1"/> ✖	\$13.00 / Each	\$13.00
			Edit Details
			Supplier Total: \$13.00
			Checkout

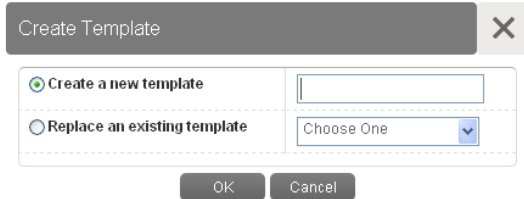
Creating a Template of Frequently Ordered Products

If you have products that you regularly order, you can create a template that can be reused every time you need to order those products. The products to be added to the template need to be in the cart before proceeding. This is a great way to save time when you enter the product manually on a frequent basis.

1. From the cart screen, click **Create Template**.

Actions: [+](#) Create Template

2. The Create Template screen will appear.

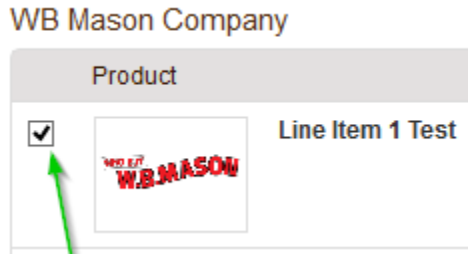


3. The radio button for Create a new template will be selected. Type a name for the template in the field to the right.
4. If a template has already been created and needs to be changed, select **Replace an existing template** and select the template from the list.
5. Click **OK**.
6. Once a template has been created, it can be accessed by clicking on **Marketplace** in the menu bar and selecting **Template Orders**. The following options are available:
 - a. **Use** – click **Use** to add the products to your cart. Doing so will replace anything that is currently in the cart.
 - b. **View** – click **View** to see all products in the template. Pricing is updated as it changes.
 - c. **Delete** – click **Delete** to permanently delete the template. A confirmation message will appear prior to deletion to confirm your selection.

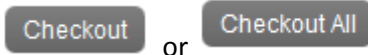
NOTE: When you use a Template Order, the products will replace any current products that you have in your shopping cart.

Checkout Process

1. Any products appearing in the shopping cart with a check in front of the product will be forwarded on. If you do not wish to order a product yet but don't want to delete it from the shopping cart, click the **checkbox** to remove the check.



2. Click Checkout to start the checkout and requisition process for the items being purchased for this supplier. Or click Checkout All at the bottom of the shopping cart to start the checkout and requisition creation process for all items in the shopping cart.



Locations

The shipping and billing addresses will be selected in the Locations section of the checkout screen. These addresses are preloaded in Unimarket. If you select another location and complete the checkout, your selection will be your new default for your next checkout.


Checkout

▼ Locations	
Lehigh Univ Purchasing Department / Lehigh Univ Accounts Payable	
Ship To * Purchasing Department ▼ Attn * Jacquelyn Febbo Lehigh Univ Purchasing Department [PURCHG] 516 Brodhead Avenue Bethlehem, PA 18015 United States	Bill To * Accounts Payable ▼ Attn:Accounts Payable Lehigh Univ Accounts Payable [AP] 520 Brodhead Avenue Bethlehem, PA 18015 United States


Checkout Items

The items that you selected from the shopping cart will be listed as separate lines in your checkout Items. Each line item will show the product name, Unit Price/Unit of Measure, Quantity and Subtotal. You may copy or remove the line items from the checkout screen using the buttons to the right of the products.


3. Use the FOAP Account fields to enter the INDEX and ACCOUNT numbers that will fund your line item purchase.






- a. The Index field will be a free text field that requires 6 digit number, for the Account field, you can type in the number or description of the FOAP and a dynamic list will appear to be selected from.
- b. You can use the Copy Down button to repeat your selected FOAP Accounts to each line below. 
- c. Use the magnifying glass to open a search window if you have trouble finding the FOAP Accounts that you are trying to allocate for the line item.

Product



Line Item 1 Test
Unit Price: \$13.00 / Each

Delivery Date : 

Account      Split






72010 - Office Supplies

72018 - Print Suppl-Other

72019 - Print Suppl-Paper

Notes and Attachments

4. Enter any notes or attach any related documents to your order in the Justification or Notes and Attachments section of the checkout screen.
 - a. The **Justification Notes** and Attachment are for **internal justification use** and will not be sent to the supplier
 - b. The **Delivery Notes** and Order Attachments are for **sending information to the supplier** and will be sent to the supplier with the final PO.
 - c. You can attach as many documents as needed with a single size limit of 10 megabytes

		Total	\$13.00
Delivery Notes	<input type="text"/>	Order Attachments 	 Add Attachment »
Blanket Order 	<input type="text"/>	Order Receiving *	<input type="text" value="Receive Automatically"/>
Justification			
Justification 	<input type="text"/>	Justification Attachments	 Add Attachment »

5. Once your checkout screen is complete with all of the needed information, click Checkout.

Checkout

Saving a Checkout

6. If you need to enter more information and must come back to the checkout screen, you can Save your checkout progress.

Save

- a. This will create an In Progress shopping cart that can be seen when you click the shopping cart button. You will know that you have items in your In Progress cart when the red number appears above the cart icon.



- b. When you click on the shopping cart, you will see an additional tab for the **In Progress** cart. All of the information that was entered will be present when you return the saved (In Progress) cart to the checkout page.

Note: The In Progress shopping cart is also used when you copy an previous order or requisition, a declined requisition or you have saved a checkout for later updates.

Shopping Cart

Cart

In Progress **3**

NSF and Fund/Org Security

If you do not have access to purchase using the Index or your Index does not have sufficient budget for the line item amount, you will receive one of the below errors and will not be able to continue.

Note: you will not lose the products that you have added to your cart, they will be available in your shopping cart.

NSF budget check –If you index does not have sufficient fund for the purchase, you will see the below error or warning depending on the setting in Banner.

- **Insufficient budget for item 1,sequence 1, suspending transaction.**
- **WARNING : Budget is exceeded for item 1,sequence 1**

If you do not have Banner access to purchase with the selected Index, you will see the below error with your Banner finance ID.

- User JDOE does not have authority to post to chart W, Fund 100 and Organization 3435

Tracking Requisitions

After you successfully create a requisition you will be able to monitor the progress from your Dashboard on Unimarket.

1. Click the **Dashboard tab**.
2. Requisitions that have been submitted can be viewed in the Requisitions in Progress area of the information section of the Dashboard.

Requisitions in Progress			
WB Mason	RQ100076	12/11/2014 3:59 PM	\$7,235.00
Apple	RQ100063	12/9/2014 3:46 PM	\$15.00

[View all requisitions](#)

3. Click on the **requisition** from the list.
4. You may also click **View all requisitions** to see all of your requisition.
 - a. The View Requisitions screen will appear.
 - b. You can see the header level requisition information as well as the current approver(s)
 - c. The top portion of the screen will allow you to search for a requisition. Select from one or more of the following search/filter options and then click the **Search button**.
 - i. **Supplier**
 - ii. **Created Date From**
 - iii. **Created Date To**
 - iv. **Requisition Number**
 - v. **State**
 - d. To select a requisition, click on the **Requisition number** from the list.
5. The Requisition will appear.
6. The history of approvals for the requisition and the path it needs to take to complete the process can be viewed when you open the requisition under the Approvals section.

Approvals

ORG Unit Approval: 7205 - Institutional Purchasing (7205 - Institutional Purchasing)

 In Progress

Approver	Created Date	Completed Date	Level	Type
Jacquelyn Febbo			No Authority (\$0.00)	Skipped
Jane Altemose	12/11/2014 3:59 PM		Clearing Authority (\$999,999,999,999.00)	 In Progress

7. The various approval statuses include:
 - a. **Approved** - approved and advanced to the next level
 - b. **Declined** – was not approved and sent back to buyer
 - i. Declined requisitions can be copied and edited for resubmittal by the buyer who originally created the requisition
 - c. **Escalated** – skipped an individual to advance to next level
 - d. **In Progress** - current level of approval
8. Once a requisition has been completely approved, a purchase order will be generated and sent to the supplier. An email with the purchase order number and details of the purchase order will be sent to the buyer.
 - a. You as the buyer will receive a confirmation email from Unimarket when the order is sent to the supplier. You may also receive a confirmation email from the supplier once they process the order.

Viewing Order

1. Orders that have been created can be viewed in the Orders area of the information section of the Dashboard.
2. If the order is visible, click on the **order** from the list.
3. If the order is not visible, click **View all orders** to see all of your orders.
 - a. The View Orders screen will appear.
 - b. The top portion of the screen will allow you to search for an order. Select from one or more of the following search options and then click the **Search button**.
 - i. **Supplier**
 - ii. **Created Date From**
 - iii. **Created Date To**
 - iv. **Order Number**
 - v. **Requisition Number**
 - vi. **Order State**
 - vii. **Order Type**
 - c. To select an order, click on the **Order number** from the list.

View Orders

Supplier	<input type="text"/>	Buyer ?	<input type="text"/>
Created Date * From	11/5/2014 7	Created Date To *	1/5/2015 7
Order/Requisition Number ?	<input type="text"/>	Order Type ?	<input type="text"/>
Receiving ?	<input type="text"/>	Has Submitted Invoice ?	<input type="text"/>

Search Export

Order	Receiving	Type	Buyer	Requisition	Supplier	Order Date	Total
PU000005	Closed	Standard	Jacquelyn Febbo	RQ000006	WB Mason Company	1/2/2015 9:49 AM	\$4.40
PU000004	Closed	Standard	Jacquelyn Febbo	RQ000005	Dell Marketing L.P.	12/22/2014 11:59 AM	\$4,643.55
PU000003	Closed	Standard	Robert Siegfried	RQ000004	Lenovo (United States) Inc.	12/22/2014 9:55 AM	\$718.74
PU000002	Closed	Standard	Jacquelyn Febbo	RQ000003	Dell Marketing L.P.	12/19/2014 2:09 PM	\$1,401.04