

# Welcome to Tufts Marketplace

A User Guide

2014

Tufts University Finance



# Table of Contents

<a href="#"><u>Introduction</u></a>	<a href="#"><u>Page 6</u></a>
<a href="#"><u>Signing In</u></a>	<a href="#"><u>Page 7</u></a>
<a href="#"><u>Creating an Order</u></a>	<a href="#"><u>Page 8</u></a>
<a href="#"><u>Check out Process</u></a>	<a href="#"><u>Page 9</u></a>
<a href="#"><u>Order Status</u></a>	<a href="#"><u>Page 11</u></a>
<a href="#"><u>Reconcile to Data Warehouse reports</u></a>	<a href="#"><u>Page 12</u></a>



# Introduction to Tufts Marketplace

**THE TUFTS MARKETPLACE** is a business-to-business, e-procurement system to make your sourcing, ordering and invoice payment easier! Tufts Marketplace is a one-stop, one login shopping process.

You can place orders and “check out” with the ability to allocate charges to your dept-ids or grants, in accordance with your specific, authorized profiles.



# Signing in



## Welcome to Tufts Marketplace

Please enter your username and password

Username:

Password:

Log in

If you haven't registered for the Marketplace, click [here](#) for more information and to obtain an application.  
If you need to order gases from Airgas and haven't previously registered, you must set-up an account with Airgas before ordering through the Marketplace. Please contact our rep at [susan.mcneil@airgas.com](mailto:susan.mcneil@airgas.com) to set-up an account.

Signing into Tufts Marketplace is easy!  
Use your Tufts User name (UTLN) and your  
SSO password at this site:

<https://tufts.sollodtech.com/>

Please note: For security purposes a session timeout will occur after 90 minutes of no activity within Tufts Marketplace (partially completed orders could be lost). **Also the “back” and “forward” browser buttons should not be used.**

# Creating and Submitting an Order



A screenshot of the Tufts Marketplace website. At the top, there is a navigation bar with links for Home, Orders, Contact, and Help, and a user profile dropdown and Logoff link. Below the navigation bar, a welcome message reads "Welcome to TUFTS MARKETPLACE!". Underneath, there are "Useful Links" for "Strategic Partners and Preferred Suppliers" and "Tufts Marketplace User Guide". A section titled "To Place an Order." contains a five-step list: 1. Click on Supplier Logo, 2. Add items to shopping cart, 3. Follow Supplier checkout process, 4. Verify Shipping &amp; Cost Center information, and 5. Click Submit. The main content area is divided into categories: "Computers Equipment &amp; Hardware" with logos for CDW-G, Apple, and GoyConnection; "Office Supplies" with a Staples logo; and "Scientific Supplies &amp; Equipment". An orange-bordered box on the right contains the text "Click on the supplier logo for the supplier you want to place an order with (scroll down to see more choices)", with an orange arrow pointing to the Staples logo.

Once you click on the supplier logo, you will be brought to that supplier's web-site. You will be able to use the features of that suppliers ordering site such as; shopping lists, order status, returns, etc... Remember, each supplier web-site is different and may have different features.

You add items to your shopping cart just as you normally would on any on line shopping site. When you are ready to "Check Out", you continue as normal. Once you check out, you will be brought back to Marketplace web-site to complete the check out process. The check out process includes choosing a ship to address as well as the cost center (DeptID-Grant) where the items should be charged.


\*There are some suppliers' logos on the Home Page that are simply links, there isn't an ordering system. These suppliers to date include Creative Office Pavilion, Egencia and Union Office.



# Check Out Process

## Order #361506 for Staples

**Order History**  
Current status: **Current Order**

**Shipping Information** 


Name: Barbara Daddario  
Bldg / Room / Dept: Test  
Address Line 1: TUFTS UNIVERSITY RECEIVING  
Address Line 2: 200 WESTBORO RD  
City: NORTH GRAFTON  
State: MA  
ZIP Code: 01536

**Payment info**  
Change Cost Center information as needed, enter the percentage and click Add.  
Once 100% is distributed the submit button will become available, click to submit the changes.  
Please select the appropriate cost center option.


DeptID-GrantCode	Account	Amount
C222100 - C222100	5411 - 5411-General Office S	100 % or US\$ 68.70

**Add Cost Center** Remaining: 0.00 %

**Save** Remember to **Save** when done

*Annotations:*  
- Arrow points to the edit icon in Shipping Information.  
- Box: "Click  to change shipping information (if needed) see below for screenshot"  
- Box: "Change Deptid-GrantCode and Account as needed. Click **Add Cost Center** to split the cost"  
- Box: "Remember to **Save** when done"

### Change Shipping Information

Shipping Labels: 200WESTBORO 

Name \*: Barbara Daddario

Address Line 1: TUFTS UNIVERSITY RECEIVING

Bldg/Room/Dept \*: Fiancial Services Room 310

Address Line 2: 200 WESTBORO RD

E-mail \*: barbara.daddario@tufts.edu

City: NORTH GRAFTON

Phone Type (optional): Work

State: MA

Phone \*: 617-627-5137

ZIP: 01536

Fax (optional):

Country: US

**Save** **Cancel**

Remember to **Save** when done

*Annotations:*  
- Box 1: "1. Click the dropdown arrow to choose a new address" (arrow points to Shipping Labels dropdown)  
- Box 2: "2. Change additional information as needed" (arrow points to Bldg/Room/Dept field)  
- Box: "Remember to **Save** when done"

\*\*If you need additional addresses and/or DeptID's, Proj/Grants added or removed from your profile, please contact [procurementsystems@tufts.edu](mailto:procurementsystems@tufts.edu).\*\*

# Order #361506 for Staples

## Order History

Current status: **Current Order**


## Shipping Information

Name: Barbara Daddario  
Bldg / Room / Dept: Test  
Address Line 1: TUFTS UNIVERSITY RECEIVING  
Address Line 2: 200 WESTBORO RD  
City: NORTH GRAFTON  
State: MA  
ZIP Code: 01536

When the order is ready to submit, click 

## Payment info

Change Cost Center information as needed, enter the percentage and click Add.  
Once 100% is distributed the submit button will become available, click to submit the changes.  
Please select the appropriate cost center option.

DeptID-GrantCode	Account	Amount	
<input type="text" value="C222100 - C222100"/>	<input type="text" value="5411 - 5411-General Office S"/>	<input type="text" value="100"/>	% or US\$ 68.70 
<input type="button" value="Add Cost Center"/>		Remaining: 0.00 %	

Line	Item #	Product Name	Shipping	UOM	Unit Price	Quantity	Subtotal
1	563076	Sanford Sharpie Retractable Permanent Markers Fine Tip Black Ink 12/Pk	1026261692	DZN	US\$11.45	6	US\$68.70
<b>Order Item Total:</b>							US\$68.70

Comments (Please note that these comments are not always received by the vendor, so we recommend that you confirm any special instructions with the sales representative):  
(optional)

**Please note:** If the order is over \$5,000 it will be routed to Purchasing for approval. If the order is under \$5,000 it will be submitted to the supplier. To check the status of orders waiting for approval, please e-mail purchasing at: [buyapprove@tufts.edu](mailto:buyapprove@tufts.edu)

**You will receive e-mail notification from the supplier once they receive your order.**

# Order Status

The screenshot shows a web application interface for viewing order status. At the top, there are navigation tabs: Home, Orders, Contact, and Help. The 'Orders' tab is highlighted. In the top right corner, there are links for 'Profile' and 'Logoff'. Below the navigation is a 'Filters' section with three input fields: 'Show orders only from (optional)', 'Order ID (optional)', and 'Supplier (optional)'. Below these fields are three buttons: 'Filter', 'Reset', and 'Download as CSV'. A table of orders is displayed below the filters. The table has columns for Order Id, Username, Requestor, Supplier, Amount, Invoice Number, Date, and Status. Three callout boxes with orange borders and arrows provide instructions: 1. 'Click the Orders tab to see your orders' points to the Orders tab. 2. 'Click the Order Id view order details' points to the Order Id column. 3. 'Click the Invoice Number to view invoice details (if invoiced)' points to the Invoice Number column.

Click the **Orders** tab to see your orders

Click the **Order Id** view order details

Click the **Invoice Number** to view invoice details (if invoiced)

Order Id	Username	Requestor	Supplier	Amount	Invoice Number	Date	Status
361506	bmoscill	Barbara Daddario	Staples	US\$68.70		May 02, 2014 11:41:12 AM EDT	Current Order
361505	bmoscill	Barbara Daddario	Staples	US\$58.86		May 02, 2014 09:28:42 AM EDT	Current Order
361504	bmoscill	Barbara Daddario	Staples	US\$182.70		May 02, 2014 09:02:52 AM EDT	Current Order
361503	bmoscill	Barbara Daddario	Staples	US\$156.60		May 02, 2014 08:52:37 AM EDT	Submitted For Approval
361502	bmoscill	Barbara Daddario	Staples	US\$156.60		May 01, 2014 12:54:11 PM EDT	Current Order
361501	bmoscill	Barbara Daddario	Staples	US\$76.80		April 29, 2014 11:54:37 AM EDT	Submitted For Approval
361500	bmoscill	Barbara Daddario	Staples	US\$57.60		April 29, 2014 11:53:06 AM EDT	Submitted For Approval
361499	bmoscill	Barbara Daddario	Staples	US\$57.60		April 28, 2014 01:00:29 PM EDT	Submitted For Approval
361498	bmoscill	Barbara Daddario	Staples	US\$57.60		April 28, 2014 12:57:19 PM EDT	Submitted For Approval
361497	bmoscill	Barbara Daddario	Staples	US\$57.60		April 28, 2014 12:55:20 PM EDT	Submitted For Approval
361496	bmoscill	Barbara Daddario	Staples	US\$52.20		April 28, 2014 12:43:51 PM EDT	Submitted For Approval
361495	bmoscill	Barbara Daddario	Staples	US\$68.25	3004784843	April 16, 2014 03:53:39 PM EDT	Sent
361494	bmoscill	Barbara Daddario	Staples	US\$61.90	3004784842	April 16, 2014 02:39:11 PM EDT	Sent

## Possible Statuses:

**Approved** – The order is approved but hasn't been sent to the supplier

**Auto Approved** – The order is approved but hasn't been sent to the supplier

**Sent** – Order sent to the Supplier

**Awaiting Approval** – The order is over \$5,000 and waiting for Purchasing to approve.

**Approval Declined** – Purchasing rejected the order

**Canceled** – The order was canceled by the user

**Current Order** – The order hasn't been sent to the vendor. The user started the order but didn't click "Submit for Approval" button (To cancel or submit a current order, click view and then click cancel or submit)

**Supplier Rejection** – There was a problem with the order, e-mail [procurementsystems@tufts.edu](mailto:procurementsystems@tufts.edu) for more information.

# Reconciling to Data Warehouse Reports

All charges for orders place via Tuft Marketplace will billed electronically (EDI) to Accounts Payable. You will see a charge for each item of your order. Please see below for examples.



## FIN001 - Comparative Financial Summary Report by DeptID (Detail)

DATA AS OF: May 01, 2014

FY	Ledger	DeptID	Acct	Account Descr	Amount	Journal Date	Journal Line Descr	Vendor Name
2005	ACTUALS	C310100	5411	General Office Supplies	19.25	01/10/2005	ORD#7013516227~BEVERAG	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	5.99	01/10/2005	ORD#7013516227~LIQUID AC	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	10.14	01/10/2005	ORD#7013516227~REFILL-TA	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	(19.25)	01/10/2005	ORD#7013516227~REFUND I	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	5.37	01/10/2005	ORD#7013516227~SHARPIE I	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	20.92	01/10/2005	ORD#7013516227~VBALL GR	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	13.50	01/10/2005	ORD#7013516227~WITE-OUT	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	6.29	01/25/2005	ORD#5001~AMPAD 100 REC	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	8.89	01/25/2005	ORD#5001~AMPAD 100 REC	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	8.50	01/25/2005	ORD#5001~ZEBRA DUOGEL	Staples Business Adva
2005	ACTUALS	C310100	5411	General Office Supplies	8.50	01/25/2005	ORD#5001~ZEBRA DUOGEL	Staples Business Adva

The above transactions represent an order place via SupplyOrg with Staples. Please note that the Jrnl Line Description has the SupplyOrg order number. You can use this number to match up the charges.

To reach Customer Service, please dial 1-877-826-7755.

Staples Business Advantage

TUFTS UNIVERSITY  
PAUL PAGE  
169 HOLLAND ST  
SOMERVILLE, MA 02144  
Contact: - PAUL PAGE

REFER TO THIS ORDER NO. FOR ALL INQUIRIES

CUSTOMER NO.	SHIP DATE	ORDER NO.
0001014190	1/18/05	0067650589-000002
<b>PURCHASE ORDER NO.</b>	RELEASE NO.	
5001		
POST CENTER	REQUISITIONER	
C310100-5411		

SHIPPING LOCATION: Montgomery, NY FC  
CARRIER/ROUTE: SHA/COU /34

TUFTS UNIVERSITY - ORG SUPPLY A  
169 HOLLAND STREET  
SOMERVILLE, MA 02144

TOTAL PACKAGES: 1

PAGE: 1

**SPECIAL INSTRUCTIONS**

Line	ITEM NUMBER	ITEM DESCRIPTION / MODEL NUMBER	UNIT/ MEAS.	QTY. ORDERED	QTY. SHIPPED	B/O	qty
3	572044	ZEBRA DUOGEL GEL POINT PEN, ME /42110	DZ	1	1		0
4	572046	ZEBRA DUOGEL GEL POINT PEN, ME /42120	DZ	1	1		0

Need to return an item? Call Customer Service to process your return.  
Or Simply login to [www.StaplesLink.com](http://www.StaplesLink.com), click Order Management and Returns.

THIS IS NOT AN INVOICE

Staples® Check your order status on [www.StaplesLink.com](http://www.StaplesLink.com). Click My Order Status under Order Management.

PAYMENT METHOD: TERMS: TOTAL VALUE OF ORDER:

**Thank You For Your Order! Staples, Inc.**