

## HOW TO ACCESS THE MarketPlace MAIN PAGE:

1. Click on the Marketplace Tile. (You can add it to your homepage by clicking: Personalize Homepage, Add Tile, Financial System, Marketplace).

## NEW USERS:

1. Prior to using the Marketplace you must complete an NCSU Information Security Acknowledgement Form. Go to Personal Details Tab and click on ISA Form.
2. From the Marketplace main page, select My Profile.
3. Select ship to location of 782B\_03320.
4. Enter 201501 as the default Project Number.
7. Select Email User. Do not select worklist user.
8. Save your profile before exiting.
9. Steps 1-8 (in this section only) are a one-time process. You can begin with the next section "Creating an Order" after your profile has been saved.

## CREATING AN ORDER:

1. From the Marketplace main page, click on Shop the Marketplace. (See additional instructions if ordering computers/peripherals.)
2. Select your vendor (you will be transferred into the vendor's website within the Marketplace system)
3. After you have finished shopping for items, follow the online instructions for checking out or saving your quote.
4. After you have saved your quote/checked out (varies across vendors) you will be asked to transfer your cart (or it will be automatically transferred) back into the Marketplace system where you will verify funding source and submit the order for approval.
5. On this page, you will enter a requisition name for your order.
  - ❖ Orders to be paid from 5 accounts should have a req name starting with C&G.
  - ❖ Orders to be paid from non 5 accounts should have a req name starting with TMM.
6. In the comments box enter the account number to be charged as well as the business purpose for the purchase. **The business purpose must give the who, what, where, when, and why for the purchase.**
7. Save and submit order for approval.

## RECEIVING YOUR ORDER:

1. Once your order has arrived you will need to **sign and date your packing slip** and give to either:
  - ❖ Donna Richards – If order was paid from a 5 account or
  - ❖ Lauren Williamson – If order was paid from a non 5 account
2. Once we receive your signed & dated packing slip we will receive the order in the financial system for you.
3. In your role of shopper you may receive an email notification reminding you to receive the order.

FOR ASSISTANCE, PLEASE CONTACT

Donna Richards (Phone: 513-7300 Email: [djricha5@ncsu.edu](mailto:djricha5@ncsu.edu)) for 5 accounts or

Terri Moss (Phone: 515-2930 Email: [tlmarti4@ncsu.edu](mailto:tlmarti4@ncsu.edu)) for non 5 accounts