Job Aid for How to Place Orders
Using M-marketsite Browse Only with Madison Electric Catalog
“Quotes”

Procurement Services
Strategic Contract Management
December 3, 2009
I. Creating the Job or Project Quote
   1. You will work directly with the U-M Madison Electric Sales Representative to obtain a quote
   2. Madison Electric posts your quote in the Madison Electric Catalog in M-marketsite
   3. Madison Electric emails you that your quote is ready for ordering. This is an example of the email:

   ![Image of email content]

   From: Richard Sonenklar [Richard.Sonenklar@MadisonElectric.com]
   To: John, Bob
   Subject: FW: Please review the attached quotation (Quote #1860089)
   Sent: Fri 11/20/2009 2:22

   <<1860089.pdf>> From: Richard Sonenklar
   Sent: Friday, November 20, 2009 2:18 PM
   To: johnbogil@bf.umich.edu
   Subject: Please review the attached quotation (Quote #1860089)

II. Logging into M-marketsite Browse using Wolverine Access
   1. To access Browse Only you need a Unique Name and Kerberos Password
   2. Click On Wolverine Access at [http://www.umich.edu](http://www.umich.edu)
3. Click On *University Business*

4. Click On *M-Pathways Financials & Physical Resources System*
1. This message is displayed telling you that you are in Browse Only. Click On OK

2. Login with your Unique Name and Kerberos password
III. Accessing the Madison Electric Catalog

1. When you login to M-marketsite, you will go to the Home/Shop page
2. To access the Madison Electric Catalog scroll down and Click On the *Madison Electric* icon
3 You are now in the Madison Electric Catalog where you will find your quote. Click On the Quotes link in the red margin.

IV. Retrieving Your Quote

1. Enter your quote number and then Click On the search button.
2. Your Quote will appear, and Click On the number in the Quote Number Box to see details.

V. Approving Quotes

1. The details of your quote are displayed; review the quote for accuracy
2. If the quote details are correct, Click On Edit/Order
3. Able to review quote again. If the quote details are correct, Click On **Checkout**

4. To check out and return the quote to M-marketsite Click On **Confirm**
VI. Completing Your M-marketsite Shopping Cart

This job aid addresses the unique requirements for the Plant Department. It does not include all steps to process M-marketsite orders and a M-Pathways requisitions. The job aids for these functions are posted at Procurement’s M-marketsite How To page.

1. When you return your quote to M-marketsite, Click On Review to add required information to your order.

2. To edit the ShortCode and Department Reference Number Click On Edit
3. Enter the ShortCode for this order

4. In the Department Ref # field, enter the unique name of the person who will be updating the work request information in FMax

   a. Information in the Dept Ref # is included on the purchase order and the invoice. The field has 30 characters. After you enter the unique name, you can use the remaining characters for special instructions. For example, “Deliver before 2pm.” This is optional. The only required information for this field is the unique name of the person adding the work request information to this order in FMax.

5. Click On the Save button

6. Verify The Ship To address for your M-marketsite order. To edit the Ship To, Click On Edit in the Ship To address field
7. To access U-M addresses, Click On *from Org Addresses*

8. Type in the location code (Ship To) or building name then Click On *Search*

9. **When entering information into the Attention to box, keep the following in mind:**
   a. There are 30 characters total. Anything past 30 is truncated and is not transmitted
   b. The room number is critical and should be listed first. Use “RM” for room
   c. If you are entering a contact person with a long name in the Attention line begin with their last name and abbreviate if necessary
   d. You do not need to enter the building name or street address in the Attention line. This information is entered when you completed the Address Search (Step #8)
   e. After entering your information, remember to Click On *Save*
VII. Forwarding your M-marketsite cart to an M-1 User

1. Click On Assign Cart

2. To find the name of the person you want to send the cart to by Click On Search for an Assignee

3. Enter first and last name of assignee then Click On Search
4. Once you find the correct person, Click On the radio button then Click On Choose Selected User

5. In the Note to Assignee box, enter the complete work order information. You can also add additional information. This information is included in the email sent to the Assignee, but the information is not sent to NBS

6. To send the order to the Assignee, Click On Assign

7. The cart has been assigned to the assignee
8. The assignee receives an email notice that a cart has been assigned to them

9. The assignee signs into M-Pathways and completes the order

10. The purchase order information is transferred to FMAX

11. An email is sent to the unique name that was entered in the Department Ref # Field

12. The email recipient updates the work order information in FMAX