Job Aid for How to Place Orders with NBS Floor Covering Using M-marketsite and NBS 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 NBS Sales Representative to obtain a quote
2. Contact the U-M NBS Sales Representative when you are ready to place your order
3. NBS posts your quote in the NBS Floor Covering Catalog in M-marketsite
4. NBS emails you that your quote is ready for ordering. This is an example of the email:

II. Logging into M-marketsite Browse Only 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/
3. Click On *University Business*

4. Click On *M-marketsite Browse Only*
5. This message is displayed stating you are entering Browse-Only mode. Click On OK

6. Login with your Unique Name and Kerberos password
III. Accessing the NBS Catalog

1. After you login to M-marketsite, go to the Home/Shop page
2. To access the NBS Catalog, scroll down and Click On the NBS Commercial Interiors icon
3. You are now in the NBS Catalog where you will find your quote. Click On "Retrieve Quotes" link in the left margin

IV. Retrieving Your Quote

1. Find your quote three ways; by Quote Number, Email Address, or Date Range
2. If using a Quote Number, clear the email address, enter quote number, and Click On "Search"
3. If using an email address, enter the email address that the quote was posted to and Click On Search

4. If using a date range, clear the email field and Click On the Calendar Icons. Enter the date range and Click On Search
5. Once you have your quote number, Click On the View Quote Number 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 Add to Cart
NOTE: If the quote details are incorrect or need revisions, Click On Return to Supplier. Note: Once you return your quote to your cart in M-marketsite, no further changes can be made to the quote. A new quote would have to be issued by NBS.

After you click on Return to Supplier, this message appears with three options:

   a. Click On Yes to add comments for the supplier
   b. Click On No to return the quote with no comments
   c. Click On Cancel to return to previous screen. Cancel does not cancel the quote. It sends you back to the review quote details screen

3. After you click on the Add to Cart, the following message will be displayed. To continue to place your order, Click On OK
4. To check out and return the Cart to M-marketsite, click on Return to M-marketsite.

![Screenshot of the shopping cart webpage with the Return to M-marketsite button highlighted.]

**Products**

<table>
<thead>
<tr>
<th>Image</th>
<th>Style number</th>
<th>Qty</th>
<th>From Where</th>
<th>List price</th>
<th>Customer price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>180</td>
<td>New</td>
<td>$0.00</td>
<td>$0.75</td>
<td>$33.50</td>
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<tr>
<td>2</td>
<td></td>
<td>20</td>
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<td></td>
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<td>$0.95</td>
<td>$171.00</td>
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<td>4</td>
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<td>New</td>
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<td>$1.50</td>
<td>$180.00</td>
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<td>$0.00</td>
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<td>$0.00</td>
</tr>
</tbody>
</table>

**Subtotals:** $193.00

**Shopper Information**

First Name: [Redacted]
Last Name: [Redacted]

Imported Specification Files

Quote No.: 13468

10/27/2009 6:54 AM
VI. Completing Your M-marketsite Shopping Cart

This job aid addresses the unique requirements for the Plant Department. It does not include all the steps to process M-marketsite orders and M-Pathways requisitions. The job aids for those 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 permits 30 characters. After entering 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. The Ship To address for your M-marketsite order needs to be the same address as the NBS Quote. To edit the Ship To address, Click On Edit in the Ship To field
7. To access U-M addresses, Click On from Org Addresses

8. Enter the location code (Ship To) or building name, then Click On Search

9. When entering information in the Attention to box, keep the following in mind:
   a. There are 30 characters total. Anything entered beyond 30 characters 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, 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 and 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