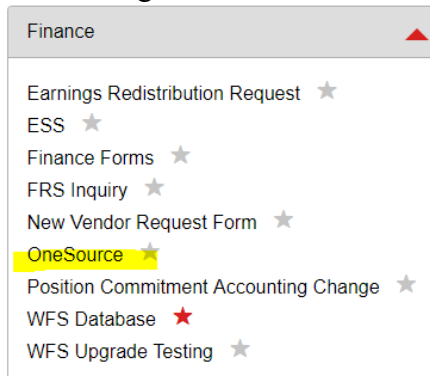


Quick Start Guide

Access

1. Login from OneSource link in the Finance section of WesPortal

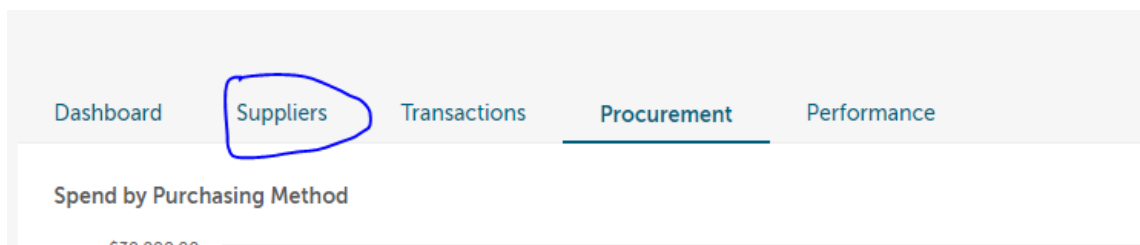


Or


2. Login directly from <https://wesleyan.unimarket.com/>

Place an Order

1. From the Home Screen Click on “Suppliers”



2. Choose the Supplier you would like to purchase from. Ex: WB Mason and click on the arrow indicating “round trip” out to WB Mason site



WB Mason Company

Wesleyan University > WB Mason Company

PREFERRED

[Store](#) [Details](#) [Contact](#) [Certificates and Documents](#) [Payment](#) [Transactions](#)

Supplier Purchasing Instructions

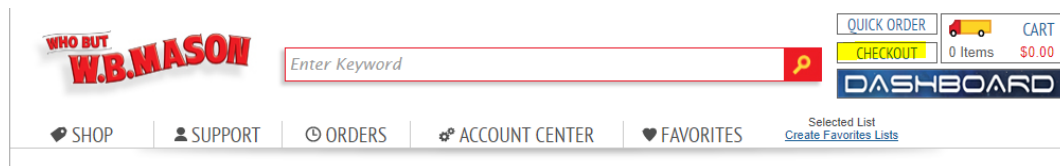
*** NOTE *** For non-catalog items - please do not use dashes or spaces in the item number.

Community Purchasing Instructions

If you need to obtain a quote on specific products or increased quantities please reach out directly to Ju

[WB Mason for Wesleyan University](#)

3. Order from site like normal, adding to cart etc. Click Checkout.



WHO BUT **W.B.MASON**

Enter Keyword

QUICK ORDER 0 Items \$0.00


DASHBOARD

Selected List [Create Favorites Lists](#)

[SHOP](#) [SUPPORT](#) [ORDERS](#) [ACCOUNT CENTER](#) [FAVORITES](#)

4. This will bring you back to OneSource. Click “Checkout”.

WB Mason

Product	Quantity	Price	Subtotal	
<input checked="" type="checkbox"/>  Ticonderoga Woodcase Pencil, HB #2, Yellow, Dozen (DIX13882) Ticonderoga Woodcase Pencil, HB #2, Yellow, Dozen	1 <input type="text"/>	\$4.40 / Dozen	\$4.40	Details
			Supplier Total: \$4.40	<input type="button" value="Checkout"/>

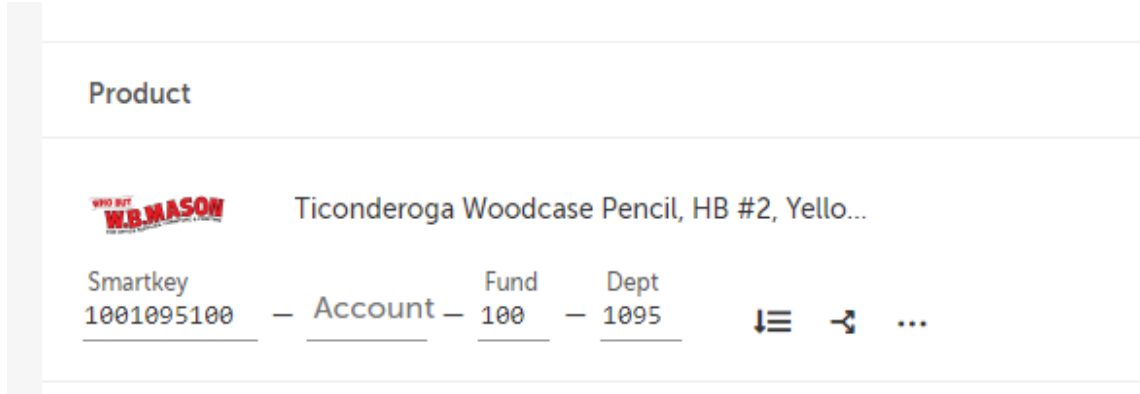
5. Verify the “Ship To” location is accurate and add any additional information in the “Attn” field.

Ship To

Attn

Finance and Administration [W/ TDEAC]

6. Complete the Smartkey and Account information

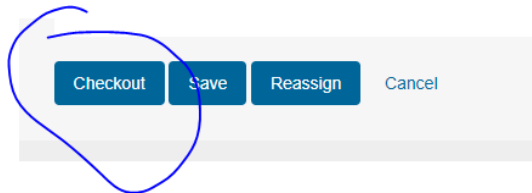


The screenshot shows a purchase order form with the following details:

- Product:** Ticonderoga Woodcase Pencil, HB #2, Yello...
- Smartkey:** 1001095100
- Account:** (indicated by a dashed line)
- Fund:** 100
- Dept:** 1095

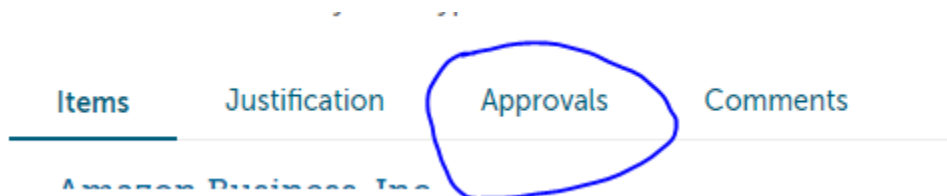
There are also icons for sorting, navigation, and a menu at the bottom right of the form.

7. Click “Checkout”



The screenshot shows a row of buttons: "Checkout", "Save", "Reassign", and "Cancel". The "Checkout" button is circled in blue.

Note: At this point, the budget will be checked with available WFS Budget. If amount is greater than \$200 it will go to applicable approvers. Approvers can be found by clicking on the “Approvals” tab here:



The screenshot shows a navigation menu with four tabs: "Items", "Justification", "Approvals", and "Comments". The "Approvals" tab is circled in blue.

Please review the approvers and notify anyone who may not yet be familiar with the system. If an approver is not in the office please contact purchasing@wesleyan.edu to set a proxy on their behalf.

Additional information for approvers can be found at the end of this guide or a more detailed “Approver Guide” can be found [here](#).

Once all approvers have approved the purchase, the order will be placed and a Purchase Order number beginning with “OSP” will be assigned. The next step does not occur until the item(s) is received.

Receive an Order

1. Once items are received, find the order in OneSource under “Transactions/ Orders/ View Orders”

The screenshot shows the OneSource dashboard with the 'Transactions' tab selected. It features two summary cards: 'Requisitions' and 'Orders'. The 'Requisitions' card shows 21 pending requisitions with a total value of \$27,477.88 and an average approval of 12.7m over the last 30 days. The 'Orders' card shows 26 orders (last 30d) with an average value of \$105.07 and 102 orders (previous 30d) with an average value of \$526.49. A blue circle highlights the 'View orders' link in the bottom right corner of the 'Orders' card.

2. Click on the applicable Order number

Order	Receiving	Type	Buyer	Requisition	Supplier
OSP0000226	Open	Standard	Valerie Nye	OSR0000307	WB Mason
OSP0000225	Open	Standard	Valerie Nye	OSR0000306	Grainger

3. Click “Receive” on the items that have been received.

Line	Item	Qty.	Price	Subtotal
1	Ticonderoga Woodcase Pencil, HB #2, Yellow, Dozen (DIX13882)	1	\$4.40 / Dozen	\$4.40
	Receiving Open	0	\$4.40 / Dozen	\$0.00
	Account 1001095100-82450-100-1095 100.00%			

A blue circle highlights the 'Receive' button in the bottom right corner of the table.

4. If all of the defaults in the “starred” boxes are accurate then just click “ok”. Otherwise change whatever needs updating.

The screenshot shows a dialog box titled 'Receive Item 1 on Order OSP0000226'. It contains the following fields: Name (Ticonderoga Woodcase Pencil, HB #2, Yellow, Dozen), Action (Receive), Receiving Date (7/15/2019), and Received Quantity (1). Below these fields is a table with the following data:

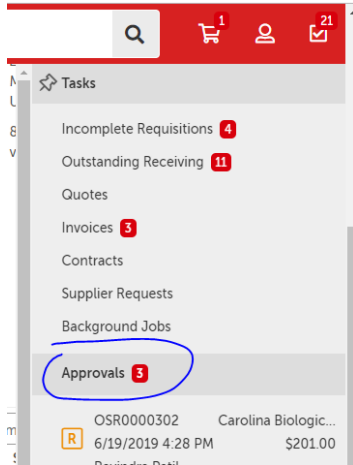
	Qty.
Ordered	1
Delivered	0
Received	0
Returned	0
Invoiced	0

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Note: Payment will be made centrally to the vendor after all items are received.

Approving an Order

1. If you are an approver and need to approve an order, simply click on the link in the email or view pending approvals from the task menu.



2. Click “Approval” button in the upper right corner.



3. Approve or Decline (Note: Reason is required if Declining)

Approve/Decline Requisition OSF

Reason