# Market Place

# Step By Step Instructions for Using the Market Place

**Getting Started**
Using Mozilla Fire Fox or Google Chrome, log into https://irisweb.tennessee.edu with UT NetID and password.
Click on "Shop" tab.
Disable Pop-Up Blocker (click on "options" and select "allow pop ups for irisweb.tennessee.edu").

**First Log In**
1. Set up default ship to and bill to addresses:
    Menu → Profile → Locate default ship to address (right side of page) and click "edit".
    Enter first letters of department name.  If address is there, select and click "update".
    Repeat for bill to address.
  If department address is **not** found under default or is not correct:
    Return to "Shop" page.  Click on "Add or Update Bill to and Ship to Address".
    Complete all fields and click "Submit".
    An email notification will be sent when addresses have been added or updated. After receiving this email notification, return the Menu → Profile to set your address as default.
2. For shoppers only, set "Transfer cart" selection.
    *Cart should be transferred to the person who will complete the order.*
    Menu → Profile → Locate "cart transfer to" (lower middle of page) and click "edit".
    Type all or part of the person's email address, select and click "update".

**Shop**
Select vendor.   Select items and specify quantity.
Follow the vendor's prompts to submit the order.  The items will be sent to a Market Place cart.
    *Items from multiple vendors may be placed in the same cart.  Market Place will sort the items into separate vendor transactions for check out.*
Select "cart" to review items.  Click "continue" to send cart to the person who will complete the order.

**Check Out –** *Departmental Specialists and Approvers may modify, delete, or release an order here.*
An email notification will alert the specialist or approver that a cart has been forwarded for checkout.

Click **1▶** to the left of a transaction to display the three sections:  header, line items, and footer.
*Red asterisks indicate required information, other cells may be used as needed by the department.*

**Transaction Header**

| | |
|---|---|
| Transaction Name | Use the system generated name or edit as needed. |
| Payment Form | Select one.  Credit card details are entered prior to check out. |
| Asset | Select one.  For assets $\geq$ $5,000.00, payment form must be PO (invoice). |
| Ship to – Attn: | Defaults to the person who created the order.  Edit as needed. |
| Account Assignment | Click "details".  Enter account# in fund cell.  Click "update" and "apply". |

   *Once an account# has been entered, it may be selected from the account assignment drop down.*

**Transaction Line Items**

| | |
|---|---|
| Account Assignment | If particular line items are to be assigned to various accounts, edit here. |

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**Transaction Footer**

Bill To - Attn:                   Enter name.

Ship To/Bill To                Click "edit" to change the default bill to or ship to addresses as needed.

**Completing an Order**

For a PO (invoice) purchase: click "validate", "check", "release", "continue", "place order".

For a CC purchase: click "validate", "check", "prepare", enter credit card information, "continue", "place order".

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## Helpful Market Place Tools!

**Order Summary**

*Includes transaction#, create date, requestor, supplier, status, system note, and total value.*

Menu → Order Summary → select fields by which you wish to search → enter criteria → click "search".

Click "export" to receive an Excel copy of the report via email.

**Reports**

*Includes date, transaction#, supplier, item/service purchased, account#, quantity, unit cost, order total, payment form, and requestor.*

Two reports to choose from: "Credit Card Transactions" or "All Transactions"

Menu → Reporting

Click expand button to the left of "University of Tennessee General Reports".

Select the desired report.

Select preferred format from the "execute" drop down button located above the report options.

In "filter by" box, highlight "transactions fiscal date", then enter beginning and ending dates in the fields below.

Highlight "item account codes" and enter all or part of the account number.

Click "OK".

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## Additional Resources

**Market Place Training Videos**       **http://marketplace.tennessee.edu/training.html**

**Contact for Support:**

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