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INTERNAL CONSULTING



User Guide

Internal Consulting Department

APRIL 25, 2023

INTERNAL CONSULTING DEPARTMENT, NORTHEASTERN UNIVERSITY
177 Huntington Ave, Boston, MA 02115



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Section 1: Overview of myMarketplace

MyMarketplace is Northeastern University's e-commerce tool for faculty and staff.

MyMarketplace is primarily used to:

- Purchase goods
- View your purchase order history
- Create and manage favorites list that would be Supplier Specific based on individual preferences.

The Internal Consulting department is responsible for managing access myMarketplace. They also provide system support related to any technical issues users experience. The Procurement department provides assistance with issues related to suppliers and orders specifically (e.g. failed orders).

Note:

- *Purchases made on myMarketplace are not encumbered in Banner Finance. The cost will be reflected when invoiced from the supplier. Weekly invoicing will occur.*
- *Please contact Procurement Services if you need assistance with ordering:*
procurement@northeastern.edu, 617-373-2135.

This document will provide information on how to use the tool once you have access granted. If you do not have access, please review documentation to request myMarketplace access.



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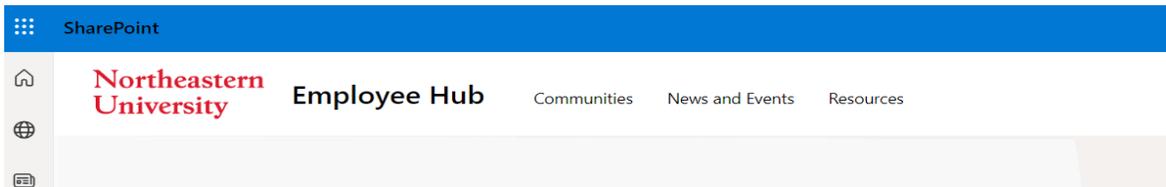
Section 2: How to use myMarketplace

This section is intended to provide an overview of myMarketplace for new users who have gained access.

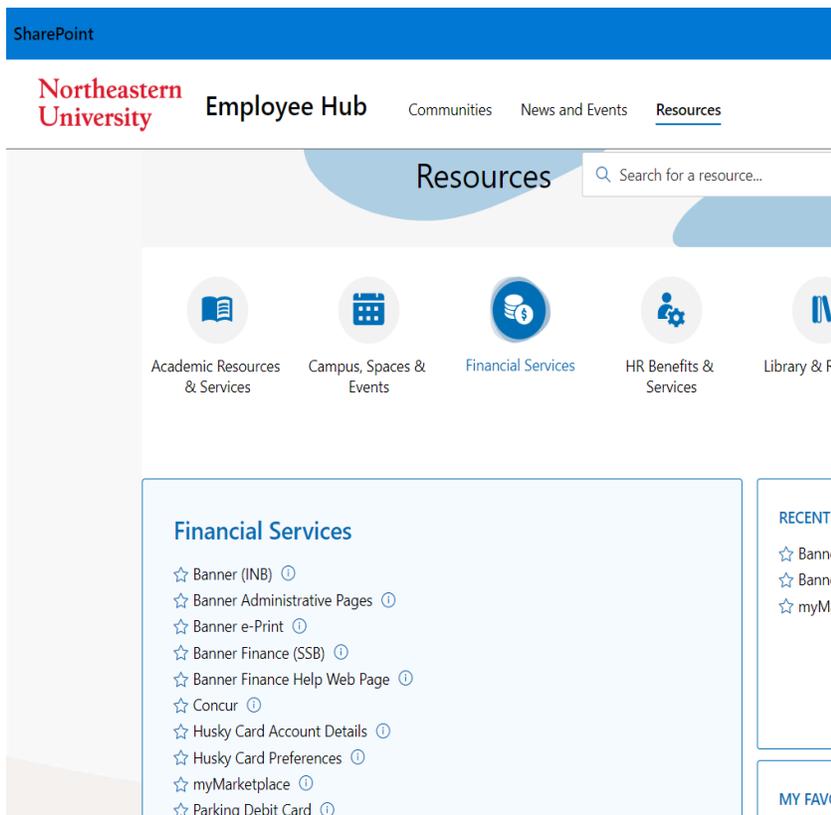
Accessing myMarketplace

The Internal Consulting department grants access based on the information provided on the myMarketplace access form.

A link to myMarketplace can be found on the Faculty/Staff **Employee Hub** under the [“Resources” tab](#):



Scroll down to “Financial Services”.





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Financial Services

- ☆ Banner (INB) ⓘ
- ☆ Banner Administrative Pages ⓘ
- ☆ Banner e-Print ⓘ
- ☆ Banner Finance (SSB) ⓘ
- ☆ Banner Finance Help Web Page ⓘ
- ☆ Concur ⓘ
- ☆ Husky Card Account Details ⓘ
- ☆ Husky Card Preferences ⓘ
- ☆ myMarketplace ⓘ
- ☆ Parking Debit Card ⓘ

To access myMarketplace, click on [☆ myMarketplace ⓘ](#) or use the following link:

<https://northeastern.sollodtech.com/login>

Log in to myMarketplace using your Northeastern email and password.



Authorization

Please enter your username and password

Username:

Password:

Log in

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Once logged into myMarketplace, you will be directed to the home page:



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Home

Orders

Contact

Help

Profile ▾

Logoff

Welcome to myMarketplace at Northeastern University!

Please Read The myMarketplace User Guide: <http://www.northeastern.edu/purchasing/pdfs/myMarketplaceUserGuide.pdf>

Training

Training sessions are provided on an ongoing basis.
Please check our [training schedule](#) for upcoming sessions.

Confidential Pricing

Supplier prices within the myMarketplace system should be treated as Northeastern University confidential. These prices are not to be shared or disclosed in any way with other suppliers, third parties, or individuals outside of Northeastern University.

Notice Regarding Furniture Orders:

Per Boston Fire Department regulations, all upholstered furniture & molded seating must meet fire code standards.
Please contact Procurement Services before placing an order for seating.

NOTE: Once you punch out from myMarketplace to one of the supplier's pages you have **90 minutes** to return to myMarketplace to complete & submit your order to the supplier. If you do not complete & submit your order within **90 minutes** you will be logged out of myMarketplace and will lose your order.

To place an order:

1. Click on the supplier logo
2. Add items to your shopping cart
3. Follow the supplier checkout process
4. Click "Submit for Approval"

Link Out Supplier - Requires Additional Username and Password



rebecca's cafe
northeastern catering



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Reprographics

Office Supplies



If you do not have authorized access to myMarketplace, you will be directed back to the Procurement Services webpage.



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Understanding Punch-Out vs. Link-Out Catalogs

MyMarketplace hosts a variety of supplier catalogs. The catalogs may be in one of two formats, *Punch-Out or Link-Out*.

Punch-Out Catalogs: Punch-Out Catalogs are supplier catalogs that are linked directly from myMarketplace. It allows the user to browse, purchase and pay through myMarketplace guaranteeing the user Northeastern's preferred pricing. Billing is performed by the user selecting their Index. (EX: Staples & Fisher Scientific)

Link-Out Catalogs: Link-out supplier catalogs are links in myMarketplace that bring you to the preferred supplier's web-based catalog. Depending upon the supplier, you may need to contact the company directly to set up a separate user account. Link-Out supplier catalogs do not have the same billing functionality as hosted catalogs. (EX: Rebecca's Café & GA Blanco)



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How to place an order

Step 1: Go to myMarketplace user page.

Step 2: Select the Supplier

Step 3: Check out

Step 4: Confirm and submit order

Step 5: Confirm Order status.

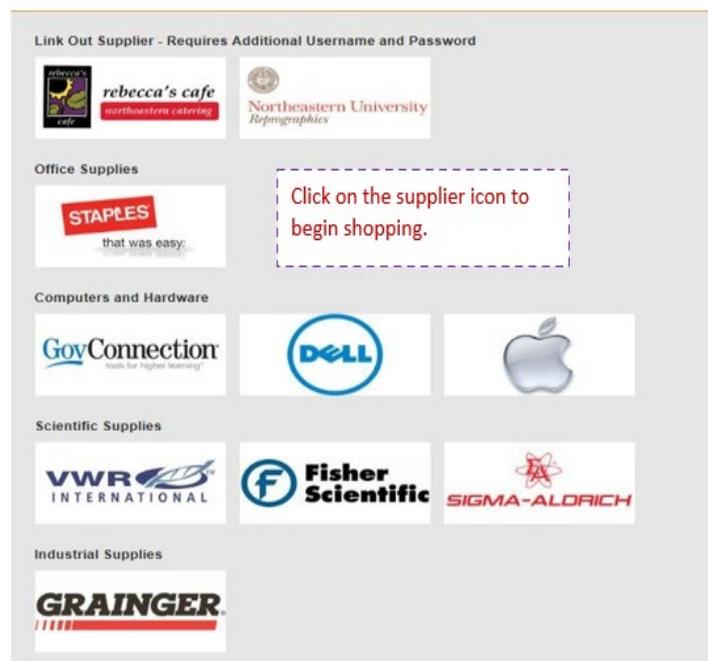
Walkthrough

Step 1: Go to myMarketplace user page

Log-in using your Northeastern University email and password.

Step 2: Select the Supplier

Once you are logged into myMarketplace, you can click on any of the Supplier Icons.





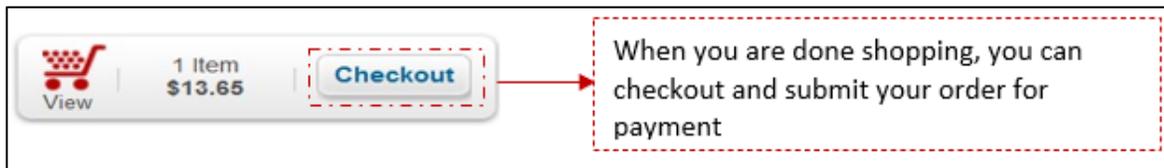
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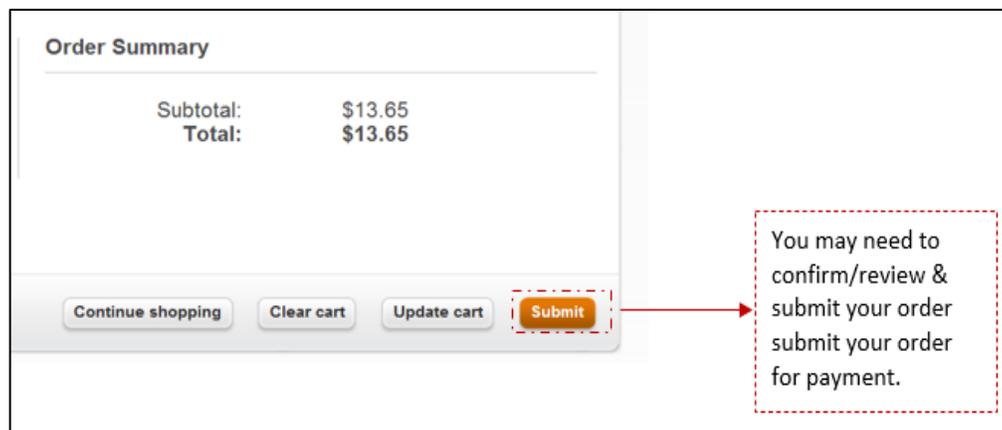
After you click on the Supplier Icon you will be directed to the supplier's Hosted Catalog. At this point, you have left myMarketplace. You can shop online using supplier specific features such as shopping lists, order status, returns, etc.

Step 3: Check Out

Once you fill your basket/cart with items and you are finished shopping with that supplier, you can "Checkout."



Step 4: Confirm and submit order





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The Check-Out Process

After you check-out and submit your order on the vendor page, you will be directed back to myMarketplace to complete your order.

Note your Electronic PO Number but Order yet to be placed.

Order #440 for Staples

To edit shipping information

Order History
Current status: Current Order

Shipping Information

Name: Laurin S. Smith
Bldg / Room / Dept: 480RP
Address Line 1: 360 Huntington Ave
Address Line 2:
City: Boston
State: MA
ZIP Code: 02115

Payment info

- If no changes are needed, scroll down & click "Send to Approval"
- Note: the defaulted index & account code will be charged
- If you need to change an index or account code, select from the drop down box & click "Confirm Cost Center Info"
- If you need to add an index, click "Add"
- Once 100% is distributed, click "Confirm Cost Center Info"
- To remove a cost center click on the trash can icon
- Note: if you make changes or add a payment line, you must click "Confirm Cost Center Info"
- If you do not click "Confirm Cost Center Info" your default index/account codes will be charged

Index	Account Code	Amount
224020 - Procurement Servic	73301 - Office Supplies	100 % or US\$ 97.90

Remaining: 0.00 %

Confirm Cost Center info

Line	Item #	Product Name	Shipping	UOM	Unit Price	Quantity	Subtotal
1	784559	Esselte SureHook Reinforced Hanging File Folders Assorted Colors LETTER-size Holds 8 1/2 H x 11 W 20/Bx	1020296423	BX	US\$19.58	5	US\$97.90

Order Item Total: US\$97.90

Send to Approval Cancel order Back to List

Your delivery location & cost center information will be defaulted from your access form.

If needed, you can edit your shipping information. Your profile will contain your defaulted address specified from your access form. If you make any changes from your defaulted address, you must click the 'save' button:



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Home Orders Contact Help Profile Logoff

Shipping Labels

Address Line 1

Address Line 2

City

State

ZIP

Country

Name *

E-mail *

Phone Type (optional)

Phone *

Fax (optional)

Bldg/Room/Dept *

To edit shipping information



Home Orders Contact Help Profile Logoff

Shipping Labels

Address Line 1

Address Line 2

City

State

Name *

E-mail *

Phone Type (optional)

Phone *

Fax (optional)

Bldg/Room/Dept *

Click on "Shipping Labels" to change the campus address.

You can also Edit Cost Center Information

Once the address is complete, click 'Save.'



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Payment info

- If no changes are needed, scroll down & click "Send to Approval"
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- Note: if you make changes or add a payment line, you must click "Confirm Cost Center Info"
 - o If you do not click "Confirm Cost Center Info" your default index/account codes will be charged

Index	Account Code	Amount	
224020 - Procurement Servic	73301 - Office Supplies	100	% or US\$ 97.90 
<input type="button" value="Add"/>		Remaining: 0.00 %	
<input type="button" value="Confirm Cost Center info"/>			

Click "Add" to split the charges between indexes numbers.

Your defaulted Index & Account code will appear. If you need to change ; use the drop-down boxes.



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Payment info

- If no changes are needed, scroll down & click "Send to Approval"
 - o Note: the defaulted index & account code will be charged
- If you need to change an index or account code, select from the drop down box & click "Add"
- If you need to add an index, click "Add"
 - o Once 100% is distributed, click "Confirm Cost Center Info"
- To remove a cost center click on the trash can icon
- Note: if you make changes or add a payment line, you must click "Confirm Cost Center Info"
 - o If you do not click "Confirm Cost Center Info" your default index/account codes will be used

Enter the % you want to charge to this Index & click "Add". Continue this process until 100% is distributed.

Index	Account Code	Amount	
224020 - Procurement Servic	73301 - Office Supplies	50 % or US\$ 48.95	
200229 - 140 The Fenway	73301 - Office Supplies	50 % or US\$ 48.95	

Remaining: 0.00 %

You MUST click "Confirm Cost Center Information" to make the changes.



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ZIP Code: 02115

Payment info

- If no changes are needed, scroll down & click "Send to Approval"
 - o Note: the defaulted index & account code will be changed
- If you need to change an index or account code, select from the drop down box & click "Confirm Cost Center Info"
- If you need to add an index, click "Add"
 - o Once 100% is distributed, click "Confirm Cost Center Info"
- To remove a cost center click on the trash can icon
- Note: if you make changes or add a payment line, you must click "Confirm Cost Center Info"
 - o If you do not click "Confirm Cost Center Info" your default index/account codes will be charged

Index	Account Code	Amount	
224020 - Procurement Servic	73301 - Office Supplies	50 % or US\$ 48.95	
200229 - 140 The Fenway	73301 - Office Supplies	50 % or US\$ 48.95	

Remaining: 0.00 %

Line	Item #	Product Name	Shipping	UOM	Unit Price	Quantity	Subtotal
1	704559	Esselte Surelook Reinforced Hanging File Folders Assorted Colors LETTER-size Holds 8 1/2 H x 11 W 20/Bx	1020206423	BX	US\$19.58	5	US\$97.90

Order Item Total: US\$97.90

After you review your order, verifying all information you entered is correct, click "Send to Approval." to place your order
If you do not, all charges will be charged to your default index and account code!



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After your order is submitted, you will be directed to the order confirmation page:

myMarketplace

Home Orders Contact Help Profile Logoff

Order was auto approved

Order #440 for Staples

Order History
Current status: Auto Approved
2014-02-19 Auto Approved
15:36:47

Shipping Information
Name: Lauren Shalmer
Bldg / Room / Dept: 480RP
Address: [Redacted]
City: Boston
State: MA
ZIP Code: 02115

Payment info

Index	Account Code	Amount
214029	73301	US\$48.95 (50 %)
0229	73301	US\$48.95 (50 %)

Your 'Order #' is important!

Line	Item #	Product Name	Shipping	UOM	Unit Price	Quantity	Subtotal
1	754559	Esselte SureHook Reinforced Hanging File Folders Assorted Colors LETTER-size Holds 8 1/2 H x 11 W 20Bx	1020296423	BX	US\$19.58	5	US\$97.90
Order Item Total:							US\$97.90

[Back to List](#)

If your order is placed successfully, you will receive email confirmation from Procurement Services. Depending upon the Supplier, you may also receive a confirmation or shipping email.



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Order Limits

Please Note: MyMarketplace is configured with the following order limits for most users:

- Orders **up to** \$10,000 are auto-approved when submitted.
- Orders between \$10,000 - \$200,000 are sent to the following approvers:

Order amount	Approver
<= \$25,000	Procurement Officer(s)
<= \$200,000	Procurement Manager(s)

- Orders over \$200,000 are auto-rejected.

In the case a user has special configuration to allow orders over \$200,000, the order will be sent to the following approvers:

Order amount	Approver
<= \$250,000	Procurement Manager(s)
<= \$500,000	AVP / CPO
> \$500,000	CFO / Treasury



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Order Status



You will see all your orders:

Click the column heading. to sort that column, click

Order Id	Username	Requestor	Supplier	Amount	Invoice Number	Date	Status
440	LaurenUser	Lauren Shafner	Staples	US\$97.90		February 19, 2014 02:08:19 PM EST	Sent
439	LaurenUser	Lauren Shafner	Staples	US\$110.65		February 19, 2014 02:06:02 PM EST	Current Order
438	LaurenUser	Lauren Shafner	Staples	US\$1,104.29		February 19, 2014 02:03:00 PM EST	Cancel
434	LaurenUser	Lauren Shafner	Dell	US\$1,200.59		January 16, 2014 09:23:57 AM EST	Cancel

Click on the order # see your order details.

The Order Status page shows the status of each order in myMarketplace. The default sort is by order date.



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Possible Statuses:

Approved: The order has been approved but has not been set to the supplier

Auto Approved: The order has been automatically approved and has been sent to the supplier (<\$10,000)

Sent: The order has been sent to the supplier

Awaiting Approval: The order is over \$10,000 and is waiting for Procurement Services to approve.

Approval Declined: Procurement Services has rejected the order.

Canceled: The order was canceled by the user

Current Order: The order has not been sent to the supplier. The user started the order but did not click the "Submit for Approval" button. To cancel or submit a current order, click view and then click cancel or submit.

Failed to Send: There is a problem with the order. Please try re-submitting the order. Contact Procurement Services for further assistance if the issue persists.

Supplier Rejection: There is a problem with the order. Please contact Procurement Services at

procurement@northeastern.edu.



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Invoicing & Banner Reconciliation

To review your order or invoicing information, refer to your order number.

Your myMarketplace order number follows you through the whole buying cycle.



The screenshot shows the myMarketplace interface. At the top, there is a navigation bar with links for Home, Orders, Contact, Help, Profile, and Logout. Below this is a "Filters" section with three input fields: "Show orders only from (optional)", "Order ID (optional)", and "Supplier (optional)". There are also buttons for "Filter", "Reset", and "Download as CSV". Below the filters is a table with the following data:

Order ID	Username	Requestor	Supplier	Amount	Invoice Number*	Date	Status
121	LaurenUser	Lauren Shalner	VWR	US\$154.02	20691958	December 02, 2011 05:58:00 PM EST	Sent

Electronic invoicing will occur weekly. If some items in an order are not shipped together (back ordered, etc.) part of your order could be on a different week of invoices.

e-Print invoices close every month – reconcile your invoices.



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How to dispute charges

To dispute charges, follow these steps:

1. Go to myMarketplace
2. Check orders by 'order #'
*Note: you can only view **your** orders*
3. Review order information and compare to invoice.
4. The University's tolerance amount is \$100. If the invoice is within \$100, then it is appropriately reconciled.

Note: Procurement Services monitors the transactions with a \$100 in difference. We are not blindly charged from our suppliers.

5. To view your transactions on your budget, use e-print or Banner
6. If there is an error, contact the supplier and/or the Procurement department

(procurement@northeastern.edu).

Contact information for suppliers can be found on myMarketplace website (see sections below).



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What to do if your order fails

What is classified as failed myMarketplace order?

A failed order occurs when a myMarketplace user places an order in the system and the order gets kicked back because of a technical problem. The order is status is marked as “Failed to Send”.

Order #159859 for Dell

Order History

Current status:	Failed To Send
2022-11-15 11:00:39	Auto Approved by d.ritter
2022-11-15 11:10:14	Failed To Send

Shipping Information

Name: Dana Ritter
Bldg / Room / Dept: 729G - 7th floor
Address Line 1: 177 Huntington Ave
Address Line 2:

Payment Info

Index	Account Code	Activity Code	Location Code	Amount
200175	73301			US\$118.98 (100 %)

myMarketplace showcasing a failed order in current status marked as “Failed to Send.”

Shipping	UOM	Unit Price	Quantity	Subtotal
1 AA542563 Logitech C920S Pro HD Webcam	EA	US\$59.49	2	US\$118.98
Order Item Total:				US\$118.98

[Back to Orders](#)

System Snapshot for Failed Order in myMarketplace

Causes of “Failed to send” -

A myMarketplace order can be labeled as “Failed to send” for the following reasons:

- **Network Issue:** A network or server issue (typically on supplier-end) stops the transaction from submitting successfully.
- **Invalid Address:** The shipping address for the order is either invalid, incorrectly input, or not supported by the supplier.



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How to resolve a failed order-



In the case that your myMarketplace order fails (“Failed to Send”), a ServiceNow case is automatically created and assigned to the Procurement department.

A member of the Procurement department will contact you to investigate the issue further and recommend a resolution.

While waiting for further assistance, it is recommended to confirm that the shipping address entered is valid, and to try re-placing the order.



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Supplier Contact Information

myMarketplace

Home Orders **Contact** Help

Supplier	Administrative/Technical	Name	Phone	Email
GovConnection		Patricia Nagle	888-800-4536	pnagle@govconnection.com
Staples		Ted Parson	781-832-3250	ted.parson@staples.com
VWR	administrative	Tim Nelson	617-306-3007	tim_nelson@vwr.com

myMarketplace Help Page

Supplier Contact Information can be found under 'CONTACTS'.

myMarketplace Help Page

Help Page

myMarketplace

Home Orders Contact **Help**

HELP TOPICS

1. ABOUT myMarketplace
2. TECHNICAL REQUIREMENT
3. LOGON
4. HOME PAGE
5. CART PAGE
6. ORDER STATUS
7. CONTACTS
8. LOGOFF

ABOUT myMarketplace

myMarketplace is an Internet-based eProcurement service that securely links you to all of Northeastern's preferred suppliers, using single sign on capabilities through myNEU.

myMarketplace Help Page