

# SmartOCI Marketplace Quick Start Guide

A comprehensive guide to streamlining purchasing processes as a Shopper via the SmartOCI Marketplace.

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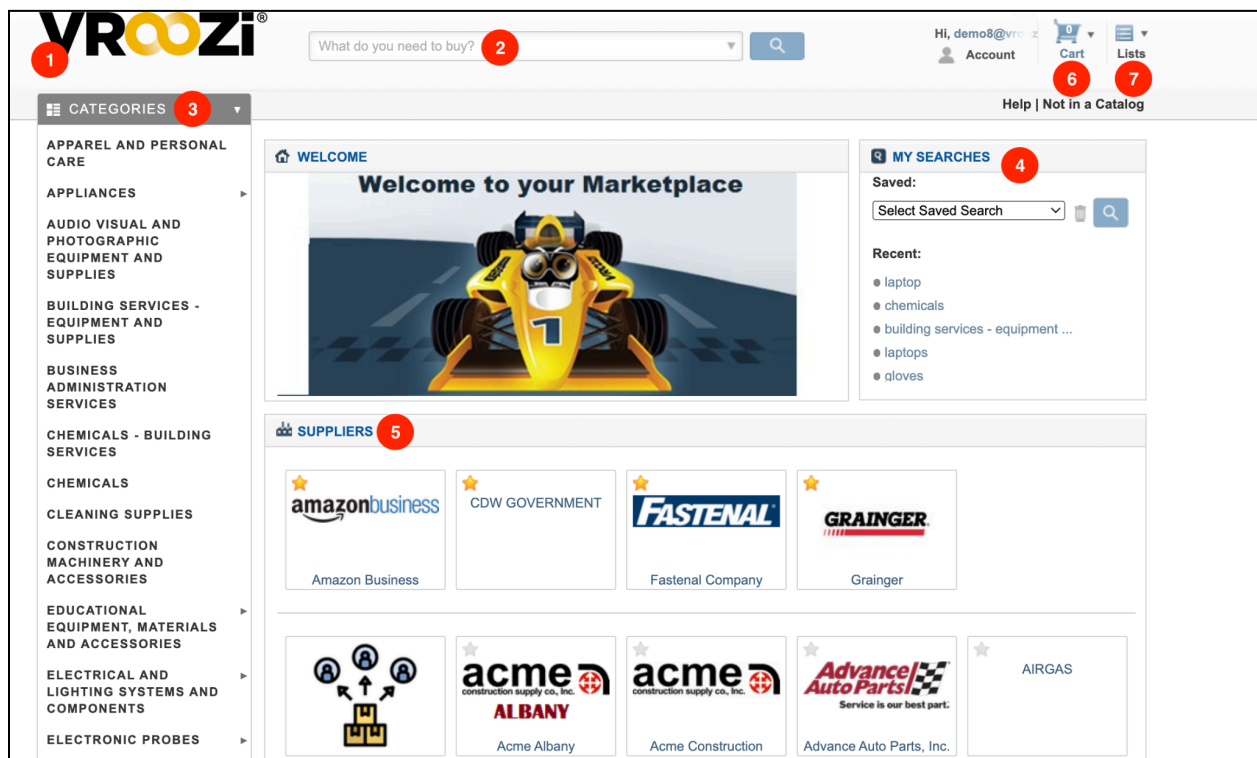
# WHAT IS SMARTOCI?

## OVERVIEW

**SmartOCI Marketplace** is a web-based search engine that enables users to access all internal and external supplier catalogs set by your organization simultaneously. **SmartOCI** is specifically designed for your organization’s ERP Purchasing environments (ex. SAP, NetSuite, IBM Maximo, etc). This replaces the traditional interfaces with a consumer-grade shopping experience and works to ensure that all buying is with the company’s preferred, approved, and contracted suppliers.

By integrating directly into your organization’s ERP via the OCI and cXML protocol, **SmartOCI** allows shoppers to find products quickly and return their cart data directly into the ERP with just a few clicks.

# SMARTOCI MARKETPLACE NAVIGATION



1. Your Organization’s icon will act as your Home Button

2. Search Bar

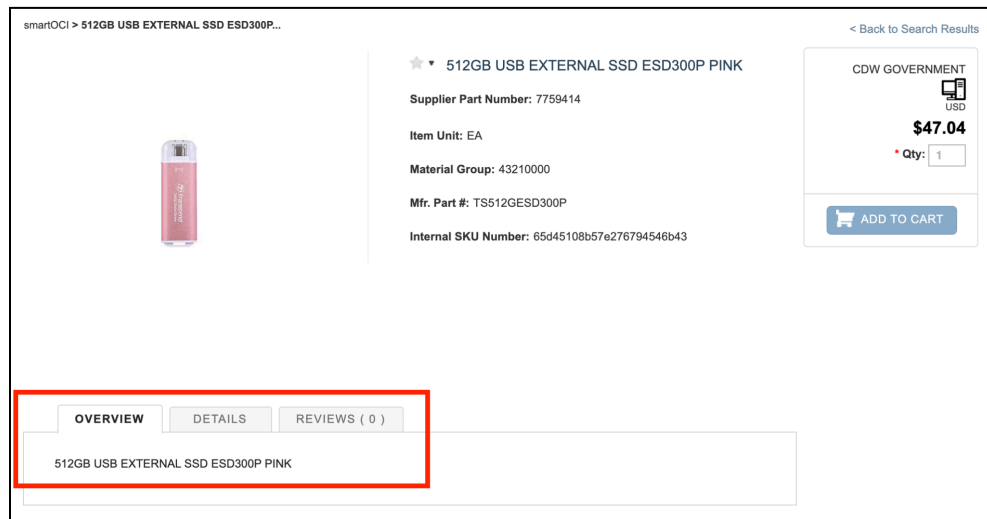
3. Search by Category List
4. Your 5 most recent and users saved searches
5. Suppliers loaded into the Marketplace (Internal and External Catalogs)
6. Your Shopping Cart
7. Lists (Favorites)

## CREATE AN ORDER

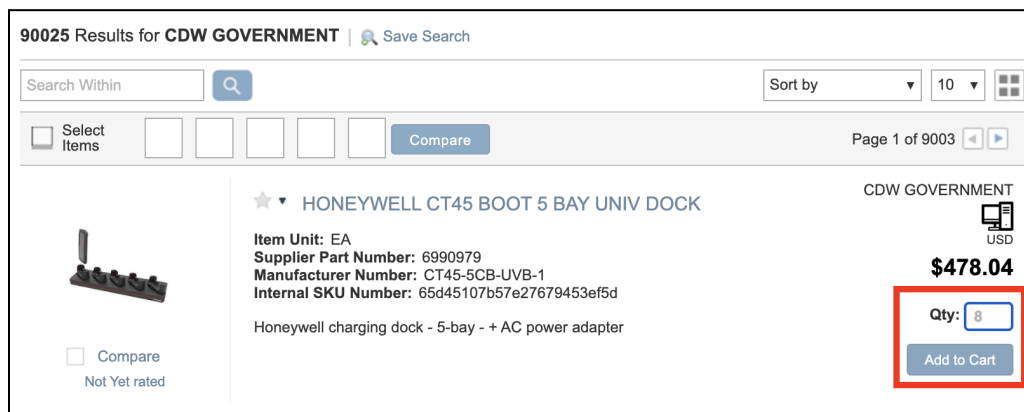
### STEPS

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1. Access your Marketplace as a shopper via your organization's ERP
  - a. From the Purchase Requisition screen, select the [Catalog](#) link
  - b. This triggers the "Punchout" via the OCI or cXML protocol → automatically logging in the user to the Vroozi SmartOCI Marketplace in a new window
2. From the Marketplace homepage, there are a number of ways to perform a federated search across your vendor catalogs (internal and external)
  - a. See [Searching For Items](#) for details
3. Viewing Product Details
  - a. Click on the item name to view a complete description of the product
  - b. View additional product information by switching between tabs on the product detail page (shown below)

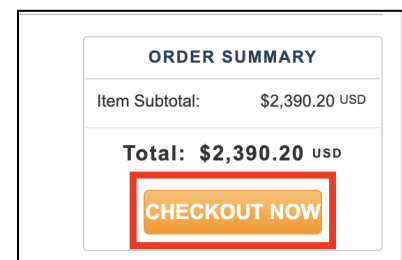


4. Specify desired quantity of a product/service and click Add to Cart (from the search results page or the Lists page)

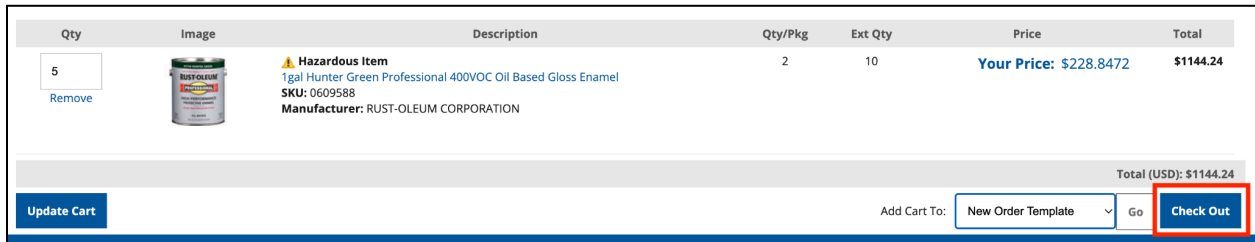


- a. In a vendor catalog Punchout, the equivalent button/icon may appear different → Add to Cart as normal
5. Check Out

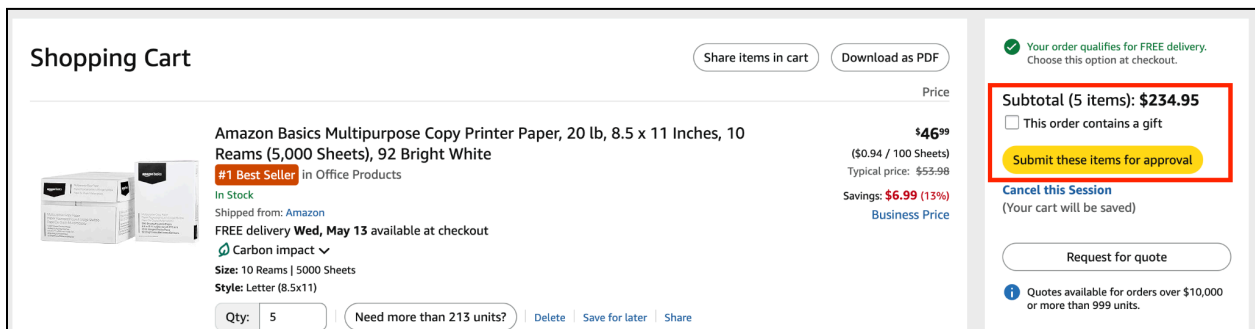
- a. Review cart contents, modify if needed, then click "Checkout Now" to return the cart to your organization's ERP
- b. If you are in a vendor catalog website, use the vendor's "check out" functionality to move items from their cart to the SmartOCI Marketplace shopping cart



**Note:** In a punchout cart, make sure to not exit the page manually and allow it to close automatically once the cart completes a successful transfer.



*Punchout Cart View*

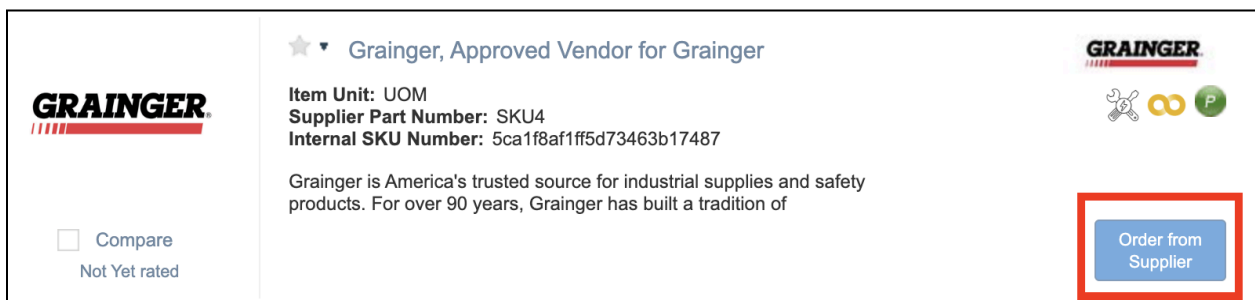


*Amazon Punchout Cart View*

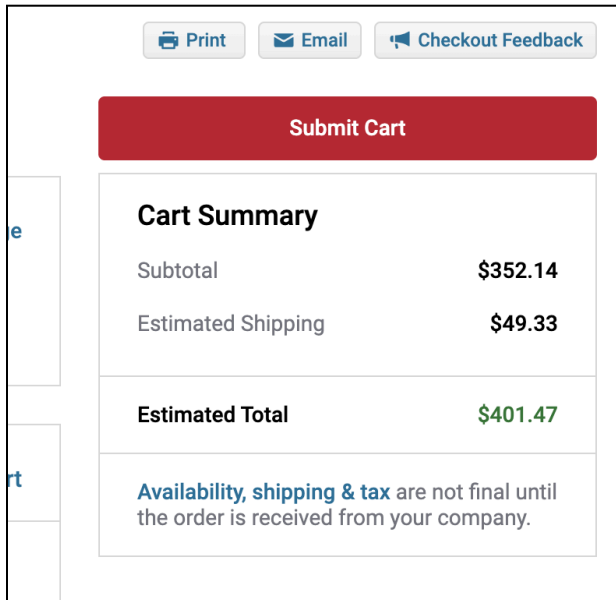
6. The cart is transferred and the transaction is completed in the buying organization's external ERP.

## PLACING AN ORDER FROM A PUNCHOUT CATALOG

1. Access your Marketplace as a shopper via your organization's ERP (as outlined in the section above)
2. Select the Supplier you wish to shop from
  - a. Select a Supplier directly from the Supplier card (as shown in the next section) or directly from the search bar (click "Order From Supplier")
  - b. A pop-up window or new browser will open to the Supplier site



3. Once in the Punchout, shop as normal by adding items to your Cart
4. Submit the order as normal, making sure to not manually close the pop-up window
  - a. The window will automatically close when the order has been successfully transferred to your organization's ERP

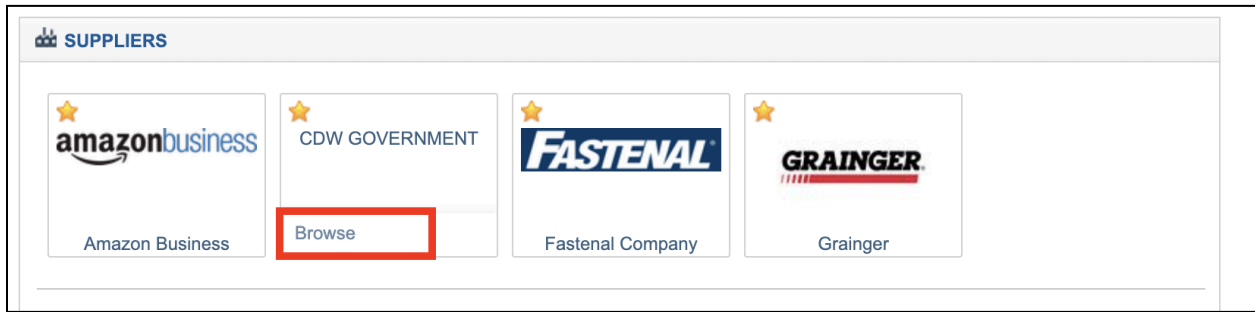


## CATALOG TYPES

### INTERNAL (HOSTED) CATALOGS

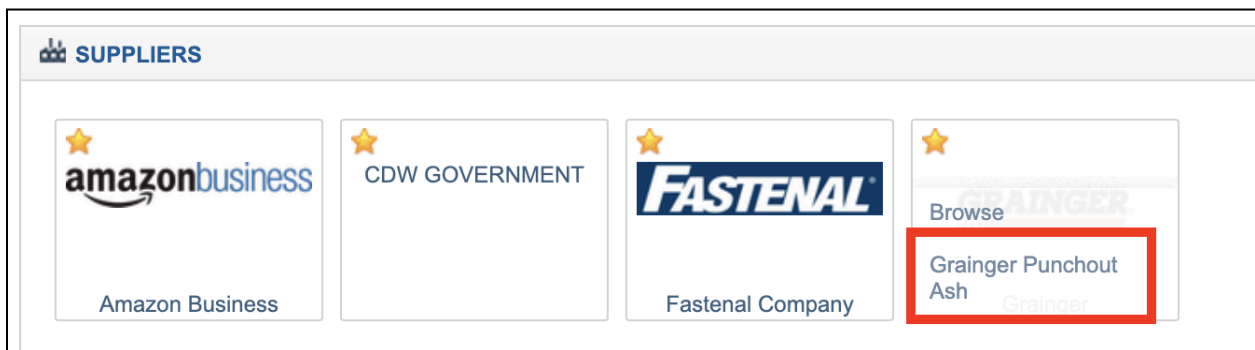
An internal (or hosted) catalog is a vendor catalog that has been directly integrated into your Marketplace (SmartOCI). This provides a seamless shopping experience as products/services are searchable and able to be added to your cart without leaving the Marketplace.

Identify a Hosted catalog by hovering over the Supplier card and finding the 'Browse' hyperlink OR by selecting a Category to shop for on the left panel (shown above in Navigation).



## LEVEL 1 PUNCHOUT CATALOG

A Level 1 punchout catalog is a link to redirect the user to the Supplier’s catalog (via pop-up window or a new browser).

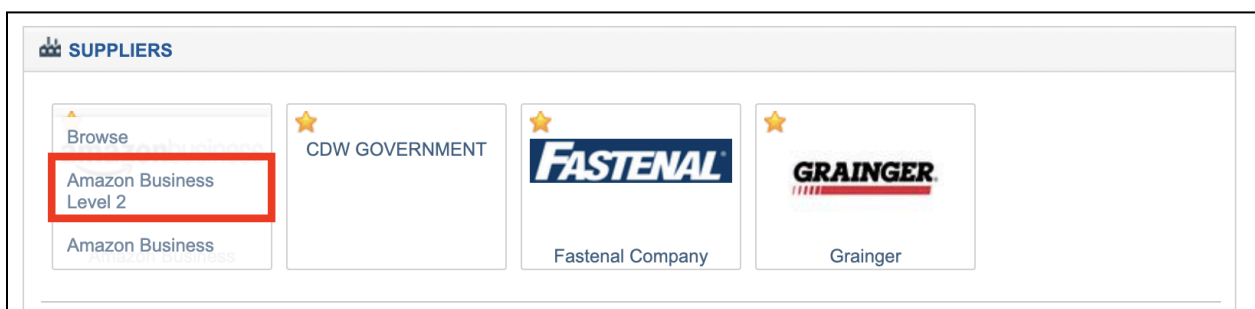


## HOSTED DATA (OR LEVEL 2) FOR PUNCHOUT CATALOGS

A Level 2 punchout catalog is hosted content directing users to a punchout catalog (pop-up window or new browser) based on search.

- Level 2 directs users to store (the supplier catalog), aisle (a category) or shelf (the SKU) depending on the supplier’s capabilities

Users are able to open/access punchouts by hovering over the Supplier card or through search results that have been set up by your organization using hosted content.



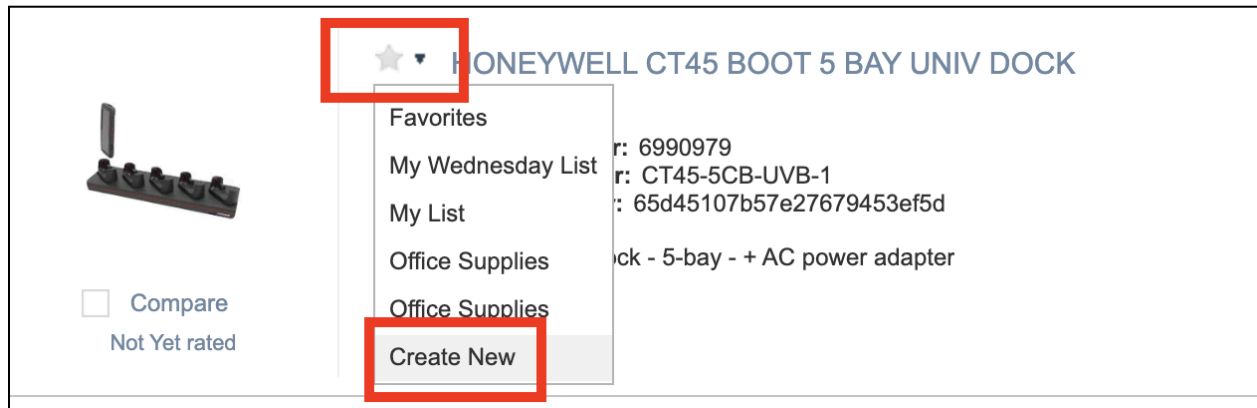
# BEST PRACTICES / PRODUCTIVITY TOOLS

## LISTS (FAVORITES)

Save your most frequently purchased items in a **list** for streamlined re-ordering.

**Note:** Favorites/Lists can only be created from products/services in Hosted (Internal) Catalogs

1. From the product view, select the star icon next to the product label
2. Add the item to an existing List or Create a New one



3. Lists will automatically save and can be modified / deleted by selecting the List icon in the top right corner
  - a. Complete Bulk Actions by selecting the checkboxes next to individual items or by Supplier
  - b. Update quantities
  - c. Remove items
  - d. Move items to Cart
  - e. Move items to different existing Lists

Lists

DEMO LIST [Delete List](#)

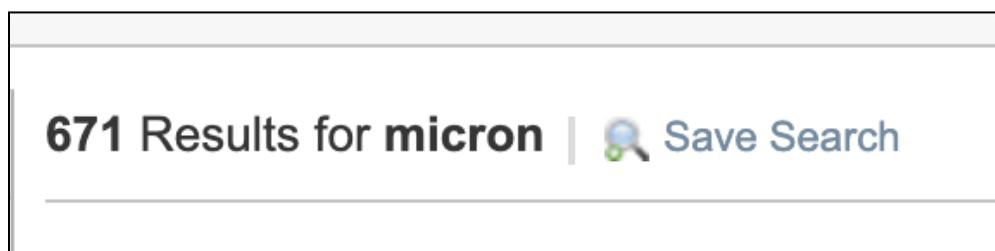
<input checked="" type="checkbox"/>	SUPPLIER	ITEM	DESCRIPTION	PRICE	QUANTITY	SUBTOTAL
<input checked="" type="checkbox"/>	CDW GOVERNMENT		HONEYWELL CT45 BOOT 5 BAY UNIV DOCK Supplier Part Number: 6990979 Honeywell charging dock - 5-bay - + AC power adapter	\$478.04 USD	<input type="text" value="1.0"/>	\$478.04 USD
<input checked="" type="checkbox"/>	CDW GOVERNMENT		BLUEFIN 15.6 R FINISHED TOUCH POE Supplier Part Number: 7792214 BLUEFIN 15.6 R FINISHED TOUCH POE	\$689.79 USD	<input type="text" value="1.0"/>	\$689.79 USD
<input checked="" type="checkbox"/>	CDW GOVERNMENT		512GB USB EXTERNAL SSD ESD300P PINK Supplier Part Number: 7759414 512GB USB EXTERNAL SSD ESD300P PINK	\$47.04 USD	<input type="text" value="1.0"/>	\$47.04 USD
CDW GOVERNMENT Total Items: 3						Subtotal: \$1,214.87 USD

Total Items 1-3 of 3 Page 1 of 1

Move Selected Items to:

## SAVED SEARCHES

To save a search you may want to repeat or return to later, click the **Save Search** link at the top of the results page → enter a name for the search → Save.



Save Search ✕

NAME THIS SEARCH

\*Name:

\* Required Field

## FILTERS & REFINEMENT

Use filters to refine search results by:

- Show/hide specific catalogs
- Show only items that match certain filter conditions
  - Click Reset Filters to reverse action
- Show only items from vendors with certain company attributes
  - Attributes are set by your organization’s Administrator (ex. Green Certified, Women Owned, IT, etc)
  - Attribute icons are shown to the left of the product (highlighted in the image below)
- Show only items within a specified price range

The screenshot shows a search results page for 'micron' with 671 results. On the left, there is a 'REFINE RESULTS' sidebar with two sections: 'SUPPLIER' and 'COMPANY ATTRIBUTES'. The 'SUPPLIER' section lists various vendors like AIRGAS, Allpriser, and CDW GOVERNMENT. The 'COMPANY ATTRIBUTES' section includes icons for Green certified, IT, MRO, Office Supplies, Preferred contr..., and Vroozii Premier... The main content area displays three product listings. Each listing includes a product image, a 'Compare' checkbox, and a price tag. The first listing is for a trash bag package from GRAINGER, priced at \$38.58. The second is a MICRON 16GB DDR5-4800MHZ CL40 RDIMM from CDW GOVERNMENT, priced at \$88.17. The third is a MICRON D4 ECC UDIMM 8GB 1RX8 3200 from CDW GOVERNMENT, priced at \$48.32. Red boxes in the image highlight the 'REFINE RESULTS' header, the 'Compare' checkbox for the trash bag, and the attribute icons for GRAINGER, CDW GOVERNMENT, and CDW GOVERNMENT.

## COMPARE ITEMS

Use the *Compare Items* function for up to 6 items at a time. Check the “Compare” box under the product image and the blank boxes at the top of the results page will populate

