Yo-Mart Training Manual – Requestor/Shopper

Login url: [http://www.appleap.appstate.edu/YOMART_HOME.html](http://www.appleap.appstate.edu/YOMART_HOME.html)

You may also access Yo-Mart on the Appleap website by clicking on System Access and then Yo-Mart Shopping.

Enter your User Name in the UserID field. Enter your enterprise password, click Sign In.

![Shibboleth Single Sign-On](image)

**Forgot your username or password?**

For assistance please call Technical Support 828-262-6266, available 8am-5pm Mon-Fri

After logging into Yo-Mart you will see the main workspace overview. This is where you will view and manage the active Yo-Mart feature. For example, if you are working in your main shopping page the page will display in the main workspace as shown below. As you access other areas of the application only the main workspace changes and the side navigation menu and top banner remain in place. There will also be breadcrumbs that tell you the navigation path to the page. A drop-down icon beside a page name indicates that you can select it to access another page.

![Main Workspace Overview](image)
Placing Orders - There are three ways to shop in Yo-Mart:

Non-Catalog: These suppliers are active in Yo-Mart but do not offer a product catalog. Orders are created by entering the product information into the Non-Catalog form.

Punch-Out Catalog: A Punch-out is a website where the shopper is redirected to the supplier's site. A cart is created on that site. Then the shopper is redirected back to Yo-Mart with their selected merchandise. The Requestor logs into Yo-Mart, chooses a Punch-out supplier by clicking on the supplier's icon, and is seamlessly transported to the supplier's website. The Requestor shops the site and then returns to Yo-Mart to complete the requisition process.

Hosted Catalog: A Hosted Catalog is a supplier catalog that is embedded in Yo-Mart. The catalog is hosted by Yo-Mart, and can be searched by various criteria. Requestors can search for an item across all hosted suppliers, allowing users to comparison shop.

How to Order a Non-Catalog Item

Select View Draft Shopping Carts under the side navigation Shop Menu.

You will then see a list of any draft carts (carts you have begun but not assigned or checked out). Click on create cart.
Click on “Add Non-Catalog Item.”

Select supplier by typing the name into the form or by clicking on supplier search.

Enter item information. Required fields are Product Description, Catalog No., Quantity, Price, Packaging and Commodity Code. You can search for the commodity code by clicking on the search icon. If you do not have a catalog no., enter “na.” Enter Manufacturer Name and Manufacturer Part Number if known.

Click the Save and Close button. If you need to enter in more than one item, click the Save and Add Another button.

To continue the order process, follow the instructions “How to complete the ordering process.”
How to Order a Punch-Out Catalog Item

Click on the Vendor Icon in the Punch-out section. (This will take you to the vendor’s website forAppState)

Note: Each vendor’s website will be specific to them. Follow the directions on each website to search, select and order products. Return to Yo-Mart.

If you need to cancel the punch out order, click on the Cancel Punch-out button in the upper right hand corner.

The Shopping Cart Page will appear when you return to Yo-Mart. To complete the order process, follow the instructions "How to complete the ordering process."
How to Order a Hosted Catalog Item

Search for items in the hosted catalog by using the simple search displayed below or by clicking on the advanced search.

Example: Looking for toner

Search results can be sorted by price, supplier, part number, etc. Choose the sort method using the Sort by box. Refine (filter) results by keyword, product flag, supplier, category, packaging, etc. (available on the left side of the screen).

Change the quantity if needed and click the Add to Cart button. Then click view cart to proceed. To complete the order process, follow the instructions “How to complete the ordering process”.
How to Complete the Ordering Process

You can name your cart for future reference/searches. You can also modify your cart, empty your cart or provide various other actions by using the dropdown. If you make changes, click on the “Update” button.

If you are a shopper you will need to assign your cart to a requestor at this point. If you are a requestor you can either “Proceed to Checkout” or “Assign Cart.”

Assigning the Cart

Click on “Assign Cart.” Select the requestor whom you would like to assign the cart by clicking on “Select From profile values” or “Search for an assignee”. Make you selection then click the Assign button.

Proceeding to Checkout

Click on the “Proceed to Checkout” button.
Add required fields which are flagged in red. If you have set up default fields in your profile, those fields will appear. You can edit them as needed by clicking on the word edit to the right of each field.
You can also add Comments, attach a file and/or review history.

To enter accounting information, you can type in the codes or you can “select from all values” or “select from profile values.” If you select the Fund value, the organization value will default.

Example of Fund, Organization and Account information:
Splitting Funds:

Funds can be split at either the header level or at the line item level. To split at the header level, click on “add split” in the Accounting Codes block above. To split funds at the item level, click on the Accounting Codes Tab, then click on the word edit.

To view the approvals needed for this order, click on PR Approvals. This will vary per department setup.

Click on “Place Order.” You will receive a summary of the order.
Other Information:

When entering a PCard order, the accounting information is required but is for information only and does not encumber funds.

You can have multiple carts in process at the same time. To access your carts, click on the carts icon and then “View Draft Shopping Carts.” To create a new cart, click on the “create cart” button.

Yo-Mart will allow you to enter items from more than one supplier in the same cart. You may prefer to separate them into individual carts but if not, Yo-Mart will create a purchase order number for each supplier. If you combine vendors and part of the order needs to be held, the entire order will be held.