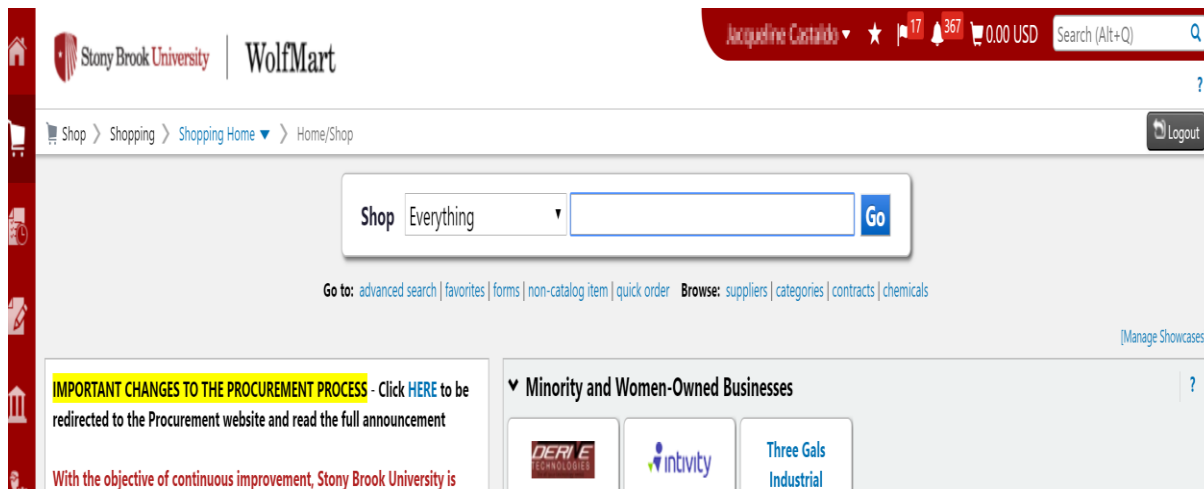


WolfMart 360 Quick Guide

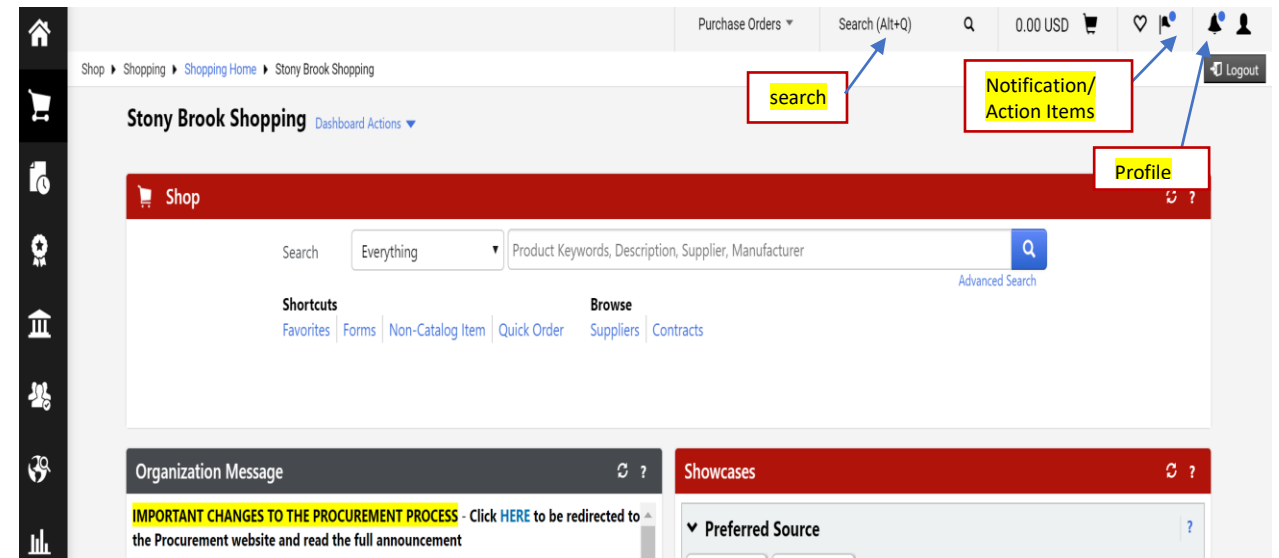
“Before & After”

WolfMart 360 is designed streamline purchasing tasks and functions. This quick-guide highlights the changes.

Current WolfMart



WolfMart 360



Home Page New Features:

- Search Bar has moved with an easily accessible dropdown menu to assist users in specific searches (i.e. Purchase Order, Voucher, etc.)
- Notifications/Action Items flag & User Profile have changed only in the order that they are displayed on the homepage
- Dashboard View: each area of the homepage will now be available in its own widget (i.e. Shop Features, Organization Message, Showcase Suppliers, etc.)

WolfMart 360: PR and PO Display

Current WolfMart

The screenshot shows a requisition summary page with tabs at the top: Requisition, PR Approvals, Comments (2), Attachments, and History. The 'Summary' tab is selected. Below the tabs, there are sub-sections for Shipping, Billing, Purchasing Use Only, and Accounting Codes. The main content area is titled 'General' and contains the following details:

- Status: ✓ Completed (5/27/2020 3:41 PM)
- Submitted: 5/27/2020 3:40 PM
- Cart Name: 2020-05-26 170808475-01
- Description: Covid Office Protection
- Priority: Normal
- Department: 28050 Economic Development (28050)
- Prepared by: Bernard Rubin
- Prepared for: Martha Mendicino
- Purchase Order: 278285 [View Order](#)
- Equipment Purchase: No
- COVID-19 Expense: ✓
- Essential for Health & Safety: ✗
- Revenue Generation for Summer 2020: ✗

WolfMart 360

The screenshot shows the updated WolfMart 360 interface. The breadcrumb trail at the top reads: Orders > Search > Requisitions > Summary - Requisition 2926134. The document total is 56.20 USD. A left-hand navigation menu is present with the following items: Requisitions, Summary (circled in red), General, Shipping, Billing, Purchasing Information, Accounts Payable Use Only, RF Approval Certification, Accounting Codes, Internal Notes and Attachm... (circled in red), Supplier Information, PR Approvals, Comments / Business Pur... (circled in red), and Attachment Overview. The main content area is divided into sections: General, Shipping, and Deliver To. The General section includes:

- Status: ✓ Completed (3/23/2020 12:54 PM)
- Submitted: 3/23/2020 12:53 PM
- Cart Name: 2020-03-23 STB-JCASTALDO 03
- Description: no value
- Priority: Normal
- Prepared by: Jacqueline Castaldo
- Owner Phone: +1 631-632-6143
- Campus: StonyBrook (28050)
- Department: 156627 (Procurement)
- Purchase Order: 0021905 [view](#) | [print](#)

The Shipping section includes a 'Ship To' address:

Ship To
 Attn: Jacqueline Castaldo
 Phone: +1 631-632-6143
 Email: jacqueline.castaldo@stonybrook.edu
 100 Nichols Road
 LaValle Stadium
 Stony Brook, NY 11794-3525
 United States

The Deliver To section includes:

Deliver To
 Building
 Sample Building

Document Display – Updated Layout:

- Menu Items are no longer “tabs” across the top of the PR/PO document and are found along the left side of the document (i.e. Summary, Comments, Attachments, etc.)
- To display the entire requisition or purchase order on the screen, click “Summary” and scroll from top down
- When completing a new cart, click “Final Approval” to ensure all required fields have been entered (*this process has remained unchanged*)

WolfMart: Requisition & PO History

Current WolfMart

Orders > Search > Search Documents ▼ > Summary - Requisition 130993563

< Back to Results 3 of 754 Results ▼ < >

Requisition PR Approvals Comments (4) Attachments (4) History

[Hide header](#)

WolfMart 360

Purchase Order: 002194S
Revision 2
3086566

Supplier: Adwar Video
Status: Completed
Document Total: 138.00 USD
[View Related Documents](#)

Status

Purchase Order ▼

Summary

General Information

Shipping Information

Billing/Payment

Additional Purchasing Infor...

Internal Information


Accounts Payable Use Only

Distribution Information

Supplier Information

Accounting Codes

Summary

PO/Reference No. 002194S
Transaction ID 32806064775435216972
Revision No. 2
Priority Normal
Supplier Name Adwar Video  [more info...](#)
Address 125 Gazza Blvd
Farmingdale, NY 11735 US
Phone +1 631-777-7070
Purchase Order Date 3/27/2020
Total 138.00
Requisition Number 2931833 [view](#) | [print](#)

Shipping Information

Ship To

Attn: Jacqueline Castaldo
Phone: +1 631-633-6143

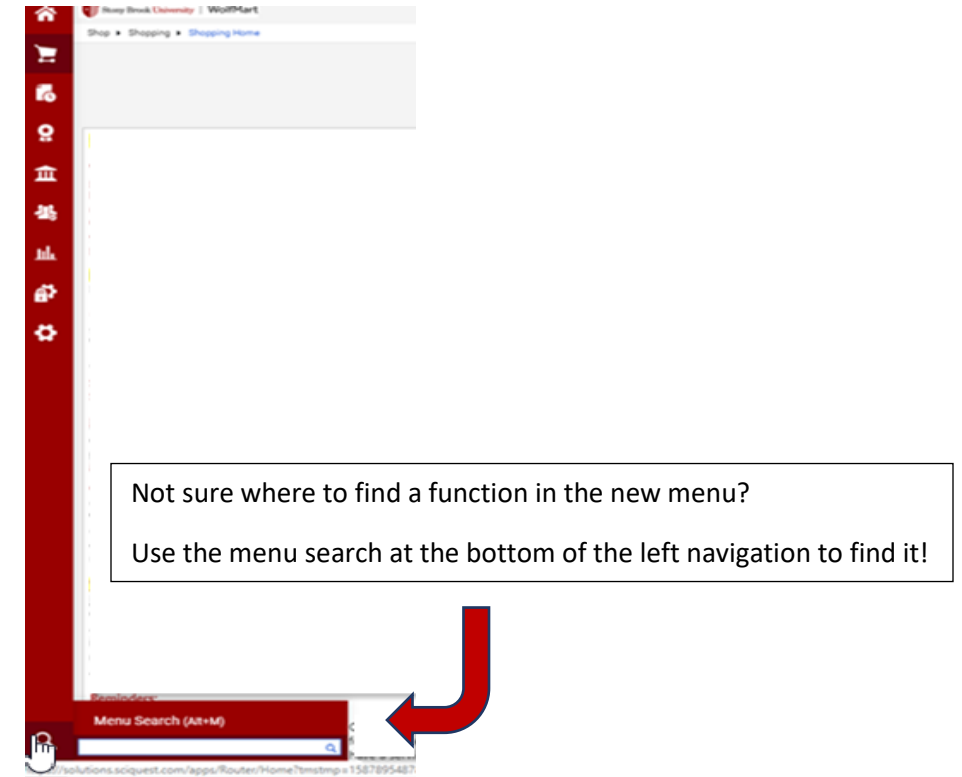
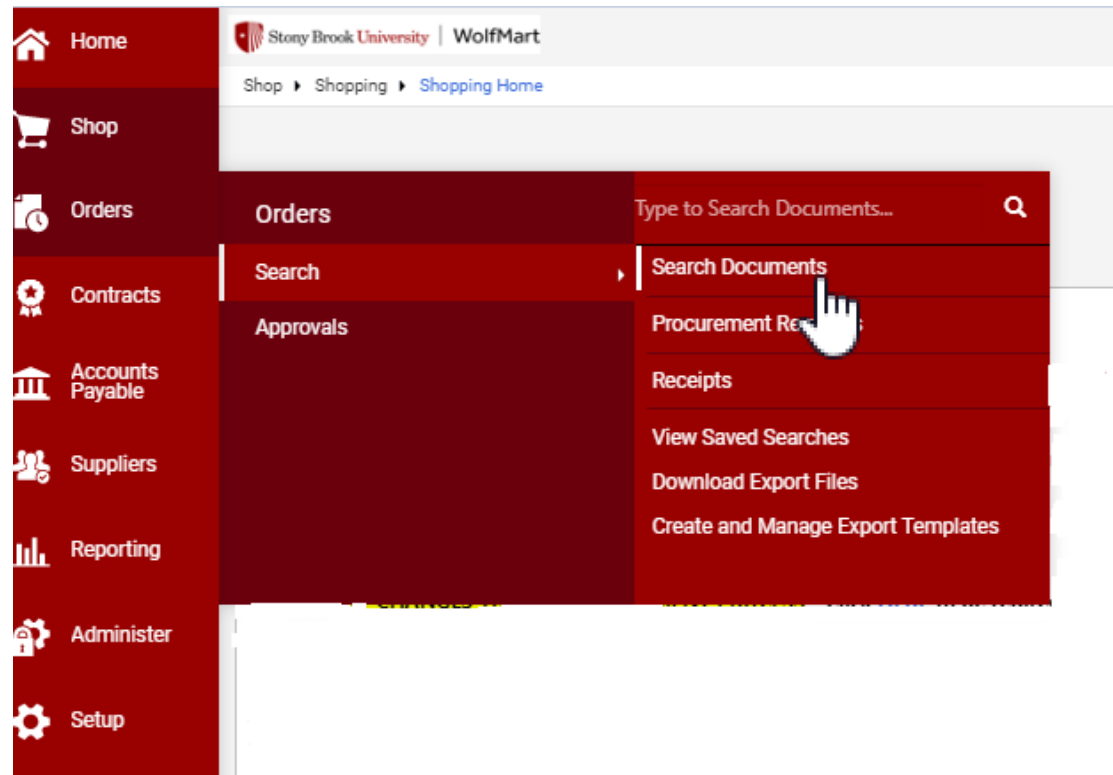
Document Actions | History
[Expand All](#)

Requisition and PO History:

- The link to view requisition/PO history is now located in the top right corner of your requisition and/or PO document
- After clicking the link, the history will open in a **new window**
- Users will notice the link is now located between “Document Actions” and “Print” (see images)

WolfMart 360: Tip #1 – Creating a Document Search

SEARCH TOOLS



Step-by-Step

Go to **Orders** > **Search** > **Search Documents**.

1. Be sure you are on the **Advanced Search** page. If you are brought to the **Simple Search** screen, select the **advanced search** below the search box. You will automatically be taken to the search screen you last used.
2. From the **Search** drop-down box, select the document type or select **All Documents**. The document type from your most recent search will automatically be populated in the drop-down.
3. Enter search criteria. Available criteria will vary based on the document-type. Mouse over the search field name or click the "?" located in the top-right corner for a description of each search field.
4. Once you have entered all your search criteria, click **Go**.

WolfMart 360: Tip #2 – Adding an Attachment

How to View or Add Internal Notes and/or Attachments:

The screenshot shows two sections: 'Internal Notes and Attachments' and 'External Notes and Attachments'. Both sections have a yellow header bar. The 'Internal Notes and Attachments' section displays 'Internal Note' with the text 'no note' and an 'edit' button circled in red. Below it is an 'Internal Attachments' section with an 'Add Attachments' button and columns for 'Size' and 'Date'. The 'External Notes and Attachments' section displays 'Note to all Suppliers' with the text 'no note' and an 'edit' button circled in red. Below it is an 'Attachments for all suppliers' section with an 'Add Attachments' button and columns for 'Size' and 'Date'.

- Click Add Attachments to include an attachment on your requisition; Click Edit to add an internal note

The 'Add Attachments' dialog box has a title bar with a close button. It features two radio buttons for 'Attachment Type': 'File' (selected) and 'Link'. Below this is a 'File *' section with a 'Select files...' button and the text 'Drop files to attach, or browse.' and 'Maximum upload file size: 9.54 MB'. At the bottom, there is a '* Required' label, a red 'Save Changes' button, and a 'Close' button.

- To View Attachments/Notes from the Side Menu, click the “Attachment Overview” link.

The 'Final Review' side menu is shown with a checkmark icon. It contains several items: 'PR Approvals', 'Comments / Business Pu...', 'Attachment Overview' (circled in red with a hand cursor pointing to it), and 'PO Preview'.