

# CREATING A SHOPPING CART

The screenshot displays the Procurement Work Center interface. At the top, there is a navigation bar with icons for Home, Employee Self-Service, Procurement, e-Grants, General Applications, Analytics, and Identity Management. Below this, a sub-navigation bar shows 'Procurement Work Center' and 'Reports'. The main content area is divided into several sections, each with an icon and a list of links:

- Requisitioning** (Shopping Cart icon):
  - Create Documents
  - Shopping Cart**
  - [Shopping Cart Template](#)
  - Central Functions
  - [Rejected Shopping Carts](#)
- Purchasing** (Shopping Cart icon):
  - Create Documents
  - [Purchase Order](#)
  - Central Functions
  - [Carry Out Sourcing](#)
  - [Document Builder](#)
  - [Rejected Shopping Carts](#)
  - [Purchase Order Details Report](#)
  - [Remove GR Indicators](#)
- Business Partner** (Business Partner icon):
  - Create Documents
  - [Supplier List](#)
- Workload Redistribution** (Workload icon):
  - [Workload Redistribution](#)
- Contract Management** (Contract icon):
  - Create Documents
  - [Contract](#)
  - [Contract Download Report](#)
- Strategic Sourcing** (Sourcing icon):
  - Create Documents
  - [RFx](#)
  - [Bid Tabulation Report](#)
  - [Reverse Auction Report](#)
  - [Rfx Details Report](#)
- Workflow** (Workflow icon):
  - Workflow is a tool to help automate complex business processes where more than one user is involved.
  - [Universal Worklist](#)
  - The Universal Worklist is a tool that allows you to manage tasks from multiple sources. You can manage your tasks, receive alerts and handle notifications.
- Utilities** (Utilities icon):
  - All utility functions can be found here for Procurement.
  - [Advanced Search](#)
  - Search for existing shopping carts and other documents.
  - [View Asset Validation Table](#)
  - Display all the current asset validations available.
  - [Material Description Report](#)
  - Report to lists Material numbers and Long Description.

1.) Click on Shopping Cart

**Create Shopping Cart: 1000151125**

Order Close Print Preview Save Check Park Export Import

Number 1000151125 Name TB409506 05/02/2022 15:12 Status In Process Created On 05/02/2022 15:12:57 Created By Toya Brown

**General Data**

Buy on Behalf of: 18450 Toya Brown Approval Note

Name of shopping cart: Program Name -Office Supplies

Default Settings: Set Values

Header Data: Values

Approval Process: Display / Edit Agents

Document Changes: Display

**Item Overview**

Details Add Item Copy Paste Duplicate Delete

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Net Value	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Total Value	Attach
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0

- 2.) Name Shopping Cart (Optional)
- 3.) Click "Add Item"
- 4.) Click "With Free Description"

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Order Close Print Preview Save Check Park Export Import

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*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
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*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
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*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0
*	Undefined Item Type				43690	Whirlpool Additiv.ECP	1.000		0.00	0.00	USD		1		05/02/2022	0	0	0

**Add Item with Free Description**

Product Type: Material

\* Description: Correction Tape

Internal Note:

Product Category: 61529 Whirlpool Additiv.ECP

Quantity / Unit: 1.000 EA

Net Price / Currency: 1.99 USD

Delivery Date: 05/21/2022

Add to Item Overview Cancel

- 5.) Add Description, Product Category (NIGP List), Quantity / Unit, Price, Delivery Date
- NOTE: Description of the item (i.e. Paper, pens, or note pads)
- Net Price: Price of the Item
- Quantity/Unit of Measures: Quantity (How Many Items)/Unit (Box- Box, Dozen – DZ, or Each- EA)
- Delevary Date should be chosen 2 -3 weeks from cart submission.

## Product Category Search:

The screenshot shows the 'Create Shopping Cart' interface for cart 1000151163. The 'Item Overview' table lists several items, including 'Correction Tape' and multiple 'Whirlpool Additiv,ECP' items. A 'Search Product Category' dialog is open, displaying a search for 'office supplies' and a list of results. The 'Add to Item' button is highlighted in the main window.

Click on  to search for product. The Search Product Category screen will appear. Type in a description of the product and click “Start Search”. Locate the item, highlight the item, click “ok” for your selection. NOTE: Place an (\*) in front of and behind the product that is being searched.

## 6.) Click “Add to Item Overview”

The screenshot shows the 'Create Shopping Cart' interface for cart 1000151125. The 'Item Overview' table lists several items, including 'Correction Fluid' and multiple 'Whirlpool Additiv,ECP' items. The 'Add to Item Overview' button is highlighted in the main window.

## 7.) Click “Details”

Note: The error messages shown are to let you know that the cost center information must be entered.

**Create Shopping Cart: 1000151125**

Order | Close | Print Preview | Save | Check | Park | Export | Import

Funds Management error, Account 62085000 requires an assignment to a CO object  
 Funds Management error, Value BLANK / SPACE is invalid for account assignment element "fund"  
 Line 1: Funds Management error, No funds center entered/derived in item 00001 (SOMS/)  
 Line 1: Account 62085000 requires an assignment to a CO object  
 Line 1: No funds center entered/derived in item 00001 (SOMS/62085000)  
 Line 1: Error in account assignment for item 1

Number 1000151125 Name Program Name -Office Supplies Status In Process Created On 05/02/2022 15:12:57 Created By Toya Brown

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Net Value	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Total Value
* 1.	Material		Correction Tape		61529	Correction Fluid	1,000	EA	1.99	1.99	USD		1		05/20/2022	0	1.99
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	

**Details for item 1 Correction Tape**

Item Data | **Account Assignment** | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval Process Overview | User-Specified Status

Identification  
 Item Type: Material  
 Product ID:   
 Description: Correction Tape  
 Catalog:   
 Product Category: 61529 Correction Fluid

Currency, Values and Pricing  
 Order Quantity / Unit: 1,000 EA each  
 Ordered Quantity / Unit: 0,000  
 Open Quantity / Unit: 1,000 EA  
 Price / Currency: 1.99 USD Price Unit 1  
 Net to Export Price:

8.) Click "Account Assignment" tab

Note: If you have an IO Skip number 9 and 10. Go to 11.

**Create Shopping Cart: 1000151125**

Order | Close | Print Preview | Save | Check | Park | Export | Import

Number 1000151125 Name Program Name -Office Supplies Status In Process Created On 05/02/2022 15:12:57 Created By Toya Brown

**Item Overview**

Line Number	Item Type	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Net Value	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Total Value
* 1.	Material		Correction Tape		61529	Correction Fluid	1,000	EA	1.99	1.99	USD		1		05/20/2022	0	1.99
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
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*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	
*	Undefined Item Type				43690	Whirlpool Additiv,ECP	1,000		0.00	0.00	USD		1		05/02/2022	0	

**Details for item 1 Correction Tape**

Item Data | **Account Assignment** | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval Process Overview | User-Specified Status

You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres

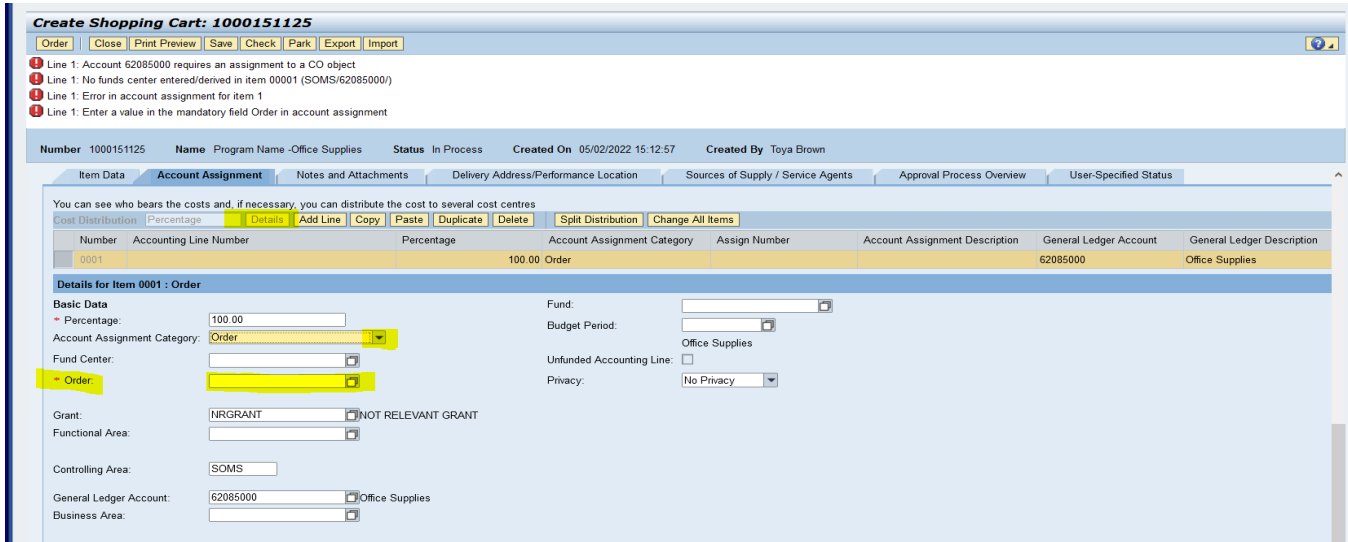
Cost Distribution Percentage  Details Add Line Copy Paste Duplicate Delete Split Distribution Change All Items

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description
0001		100.00	Cost Center	<input type="text"/>		62085000	Office Supplies

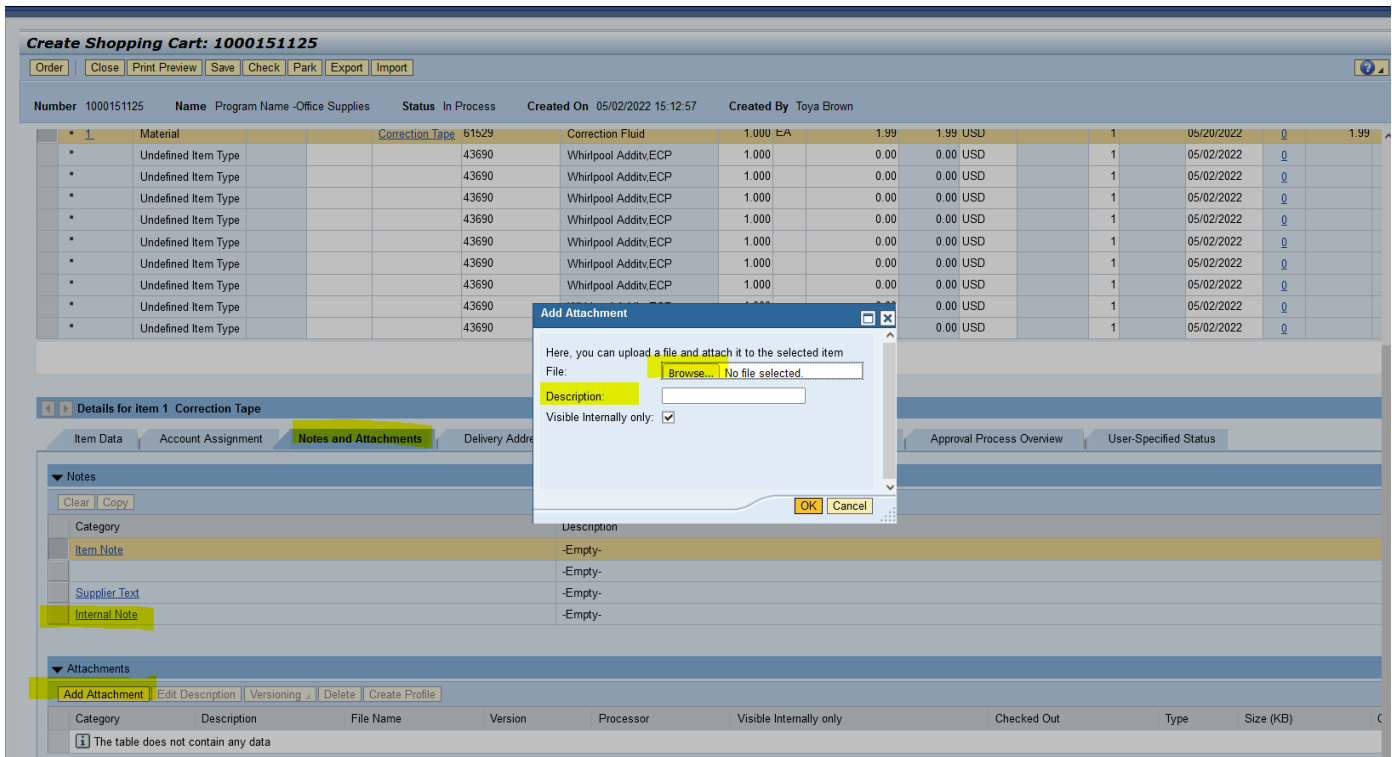
9.) Assign Number - Enter the 10 digit Cost Center for your Program Area

10.) Click "Check" (Fund and Account Assignment Description should populate.)

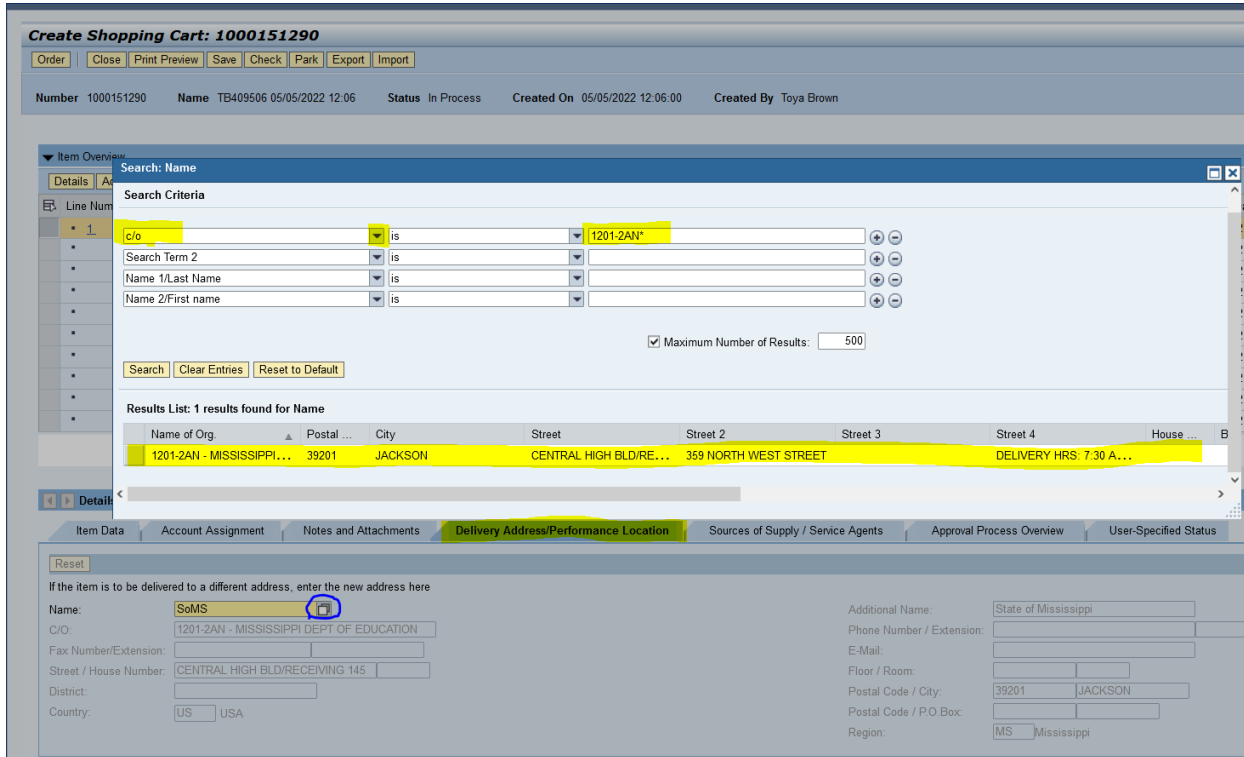
Note: Message – Shopping Cart has no erros. Skip numbers 11-14, go to number 15.



- 11.) Click "Details" under the Account Assingment Tab
- 12.) Under Details for Item 001; Account Assignment Category "Click the Down Arrow" and choose "Order"
- 13.) Order "Type the IO" ex: 3100000123
- 14.) Click "Check" (Fund and Cost Ceter associated with IO should populate.)



- 15.) Click "Notes and Attachments" tab
- 16.) Add Attachments (Attach supporting documentation: quote(s), requisitions, and other supporting documents.)



17.) Click "Delivery Address / Performance Location" to add where items ordered will be shipped.

18.) In order to search for the delivery address, click on the

The Search Criteria will display

Click on Change "Search Term 1" to "C/O" from the drop down list.

In third column on the same line type 1201-2AN\*, click "Search"

Shipping Locations:

1201-2AN Central High Bldg Receiving 145, 359 North West Street (Delivery 7:30 am -2:00pm)

1201-2AS Office of Textbooks, 500 Greymont Avenue

**Create Shopping Cart: 1000151290**

Order Close Print Preview Save Check Park Export Import

Number 1000151290 Name TB409506 05/05/2022 12:06 Status In Process Created On 05/05/2022 12:06:00 Created By Toya Brown

Item	Description	Quantity	Unit Price	Total Price	Currency	Per	Unit	In Supplier List	Priorit	
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0
*	Undefined Item Type	43690	Whirlpool Additiv.ECP	1.000	0.00	0.00	USD	1	05/05/2022	0

**Details for item 1 Correction Tape**

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location **Sources of Supply / Service Agents** Approval Process Overview User-Specified Status

No supplier has been assigned, select and assign one of the following sources of supply

Sources of Supply

Assign Supplier Compare Suppliers Display Contract

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priorit
3102091613	Southern Pine Inspection Bureau, Inc		0			0.00		0	EA	Yes	0
3100034063	Staples Inc		0			0.00		0	EA	Yes	0
3100034063	Staples Inc	8200052968	142	Correction Fluid	142	0.00	USD	1	EA	No	0
3100034063	Staples Inc	8200052968	19	Correction Fluid	61529	0.00	USD	1	EA	No	0
3102085671	Superior Text LLC		0			0.00		0	EA	Yes	0

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:

Supplier Master Record: [Display](#)

- Click "Sources of Supply /Service Agent" tab. (The supplier that will be supplying the items purchased.)
- Scroll down to locate supplier. Once supplier is displayed, select the supplier, and click "Assign Supplier". Supplier information will populate.

See screen view below:

Note: If you have the supplier's number, then the supplier's 10 digit number can be typed in the box that shows "Preferred Supplier". Ex. of a supplier's number is 3100034063.

**Details for item 1 Correction Tape**

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location **Sources of Supply / Service Agents** Approval Process Overview User-Specified Status

Remove Assigned Supplier

The Item Will Be Ordered from the Following Supplier:

Supplier:  Staples Inc Contract / Item: [8200052968/19](#)

Purchasing Info Record:  Supplier Master Record: [Display](#) Delivery Date: [05/27/2022](#)

Location / Plant:

- Click "check"
- Click "Save" if need to return to the SC later or if shopping cart is complete, click "Order" and shopping cart will route to program office approver. Once approved by program office approver, shopping cart will route to procurement for processing to receive a PO.