CREATE SHOPPING CARTS

Do you know the six steps to create a shopping cart in SRM?

1

RENAME SHOPPING CART

In the **General Data Section**, give the shopping cart a unique name.

(This is optional. The field will default to a title with your ECA and date.)

2

COMPLETE THE "SET VALUES" SECTION

Complete the **Set Values** section with the following information:

- Item Basic Data -> Unloading Point -> Type in Room Number, Contact Name, Contact Extension (as we do not include ATTN lines or suite numbers in our addresses, this is **required** so we know where your item is to be delivered)

- Account Assignment -> Assign number (Cost Center or WBS element), General Ledger, and Business Area

- Internal Note -> Add any notes to Supply Chain

This information will load for all line items added to the cart. ***Note:** If you do not add this information now, you will have to add it in for **each** line item in step 4.

3

ADD ITEMS TO CART

There are **four** methods to add items to the shopping cart:

- Free Description (i.e. Free-Text) -> type in the item descriptions from the attached Quote

- Internal Goods/Services (all animal orders) -> Select the Material Group for the type of animal you want to order. (e.g. Mouse) **MAKE SURE** it is not created under any other material group other than this. (*****Note**: Need to attach Animal Order Form)

- Old Shopping Carts & Templates -> to create a free-text shopping cart from a template (i.e. a previously created shopping cart)

- Supplier Catalogs -> a new window will pop up to take you to the Punch-Out Catalogs

4 EDIT LINE ITEM DETAILS

Each line item will have its own Details section, which allows you to:

- Enter the Supplier Product Number

- Enter the Preferred Supplier Number

- Use Multiple Account Assignments

- Enter Supplier Text

- Add Attachments (required Quotes, Sole Source form, or Contract Routing form)

5 CHECK CART

Click the **Check** button to ensure that there are no errors.

Three Types of System Messages can be displayed:

- The **error** system message will <u>stop</u> the process until data is either entered or changed. A change must be made before the user can continue. SRM will proceed after the error is corrected.

- The **warning** system message will display helpful questions to caution the user about potential errors. The user has the option to change the information or bypass the warning message. For example, you may receive an "Annual budget almost exceeded" error, but you can still proceed with the order.

- The **information** system message displays helpful information about the shopping cart. An example is "Shopping cart 10XXXXXXXXX has no errors."

6 SAVE OR ORDER CART

If you are ready to order, click the **Order** button.

- The cart will proceed through the workflow based on items ordered, total cost, and cost assignments.

If you are not ready to order, click the **Save** button.

- The cart will remain on hold until you go back in to change it.

- To retrieve a Saved cart, click the Order Status tab.