

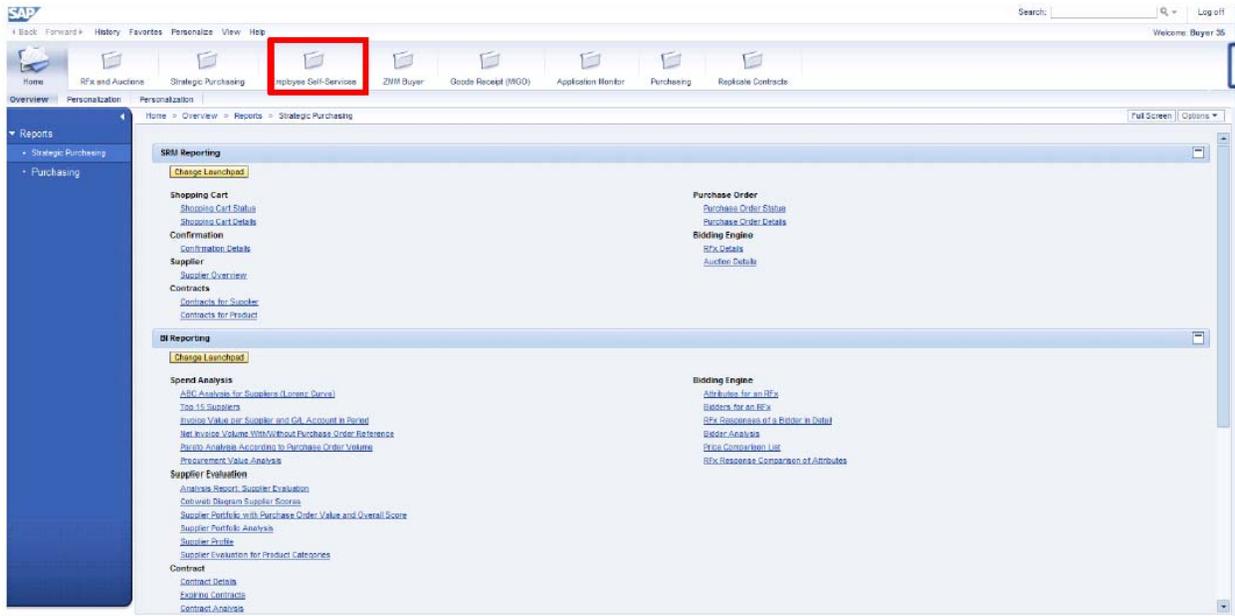
Create a Shopping Cart Using the Contract Search

Exercise 1

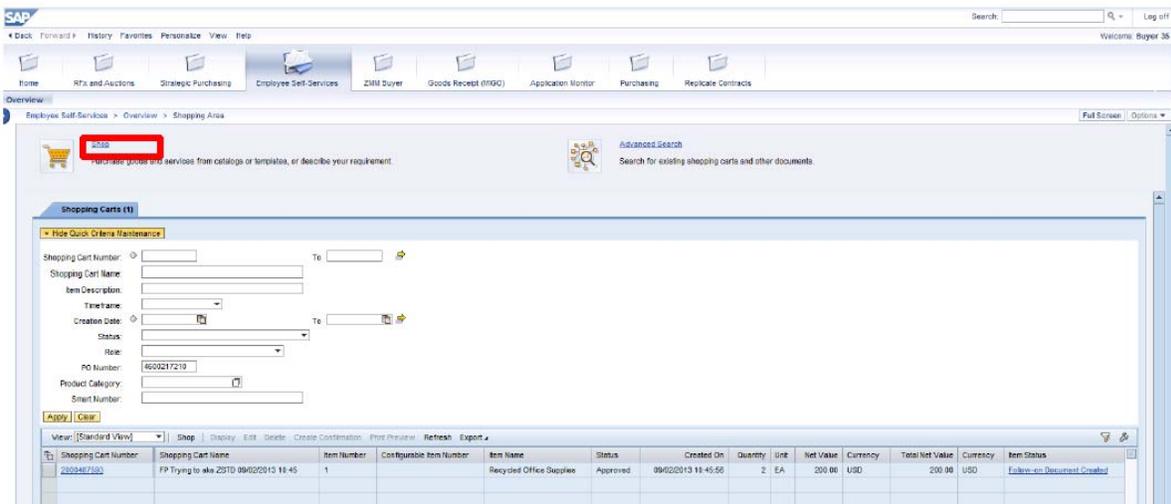
Exercise 1: Create a Shopping Cart- Using the Contract Search

Create shopping cart for non-stock items from an existing contract using NIGP/Contract Search. In this exercise, we will be requesting “Police Pursuit Tires.”

1. Select “Employee Self-Services.”



2. From the “Employee Self Services” screen, click “Shop.”

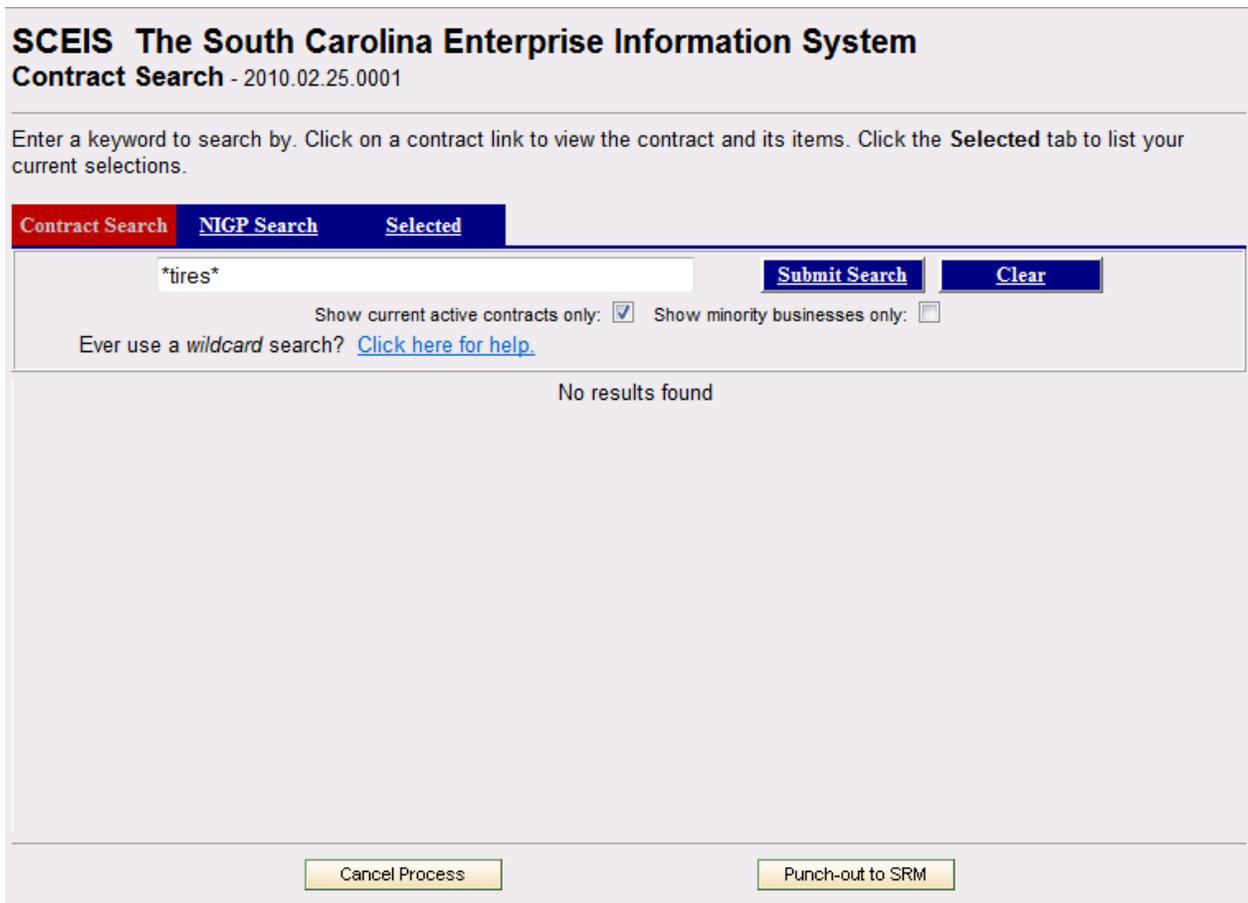


3. Select “NIGP/Contract Search” and ENTER.



4. In the next window, type in the search criteria for “*tires*” under the Contract Search Tab.

Then click . This is to verify the item is or is not on contract. Always use “Contract Search” as your first option.



5. Note five (5) contracts are displayed. Click on contract #4400001933.

SCEIS The South Carolina Enterprise Information System

Contract Search - 2010.02.25.0001

Enter a keyword to search by. Click on a contract link to view the contract and its items. Click the **Selected** tab to list your current selections.

Contract Search
NIGP Search
Selected

Submit Search
Clear

Show current active contracts only: Show minority businesses only:

Ever use a *wildcard* search? [Click here for help.](#)

5 Contracts found, displaying all Contracts.

Contract #	Bid Inv. #	Bid Invitation	Vendor Number	Vendor Name	Minority Status	Validity Start	Validity End
5000012048			7000034748	INDIANAPOLIS INDUSTRIAL PRODUCTS		07/29/2010	07/28/2015
4400001932	5400001196	Tires - Statewide Term Contract	7000052925	BRIDGESTONE AMERICAS TIRE OPERATION		12/01/2009	11/30/2014
4400001933	5400001196	Tires - Statewide Term Contract	7000140142	CONTINENTAL TIRE NORTH AMERICA		12/01/2009	11/30/2014
4400001934	5400001196	Tires - Statewide Term Contract	7000041671	GOODYEAR TIRE & RUBBER COMPANY		12/01/2009	11/30/2014
4400001935	5400001196	Tires - Statewide Term Contract	7000022518	MICHELIN NORTH AMERICA INC		12/01/2009	11/30/2014

Cancel Process
Punch-out to SRM

6. Contract 4400001933 shows six (6) contract items on this specific contract.

Check mark the box next to 00001 Police Pursuit Tire and click [Return to Search Screen](#) at the bottom of the screen.

Bid Invitation [5400001196 - Tires - Statewide Term Contract](#)
Contract Notes

Vendor 7000140142

Vendor Address CONTINENTAL TIRE NORTH AMERICA
 1830 MACMILLAN PARK DRIVE
 FORT MILL SC 29707
District LANCASTER
Telephone (704) 583-8818
Minority Status Not Applicable

E-mail
Fax Number (704) 583-8737

Vendor Contacts
 2 Contacts found, displaying all Contacts.

Contact Name	Function	Phone	E-mail
BOYKIN-JOHNSON, KIMBERLY	PRICING ADMINISTRATOR	(704) 583-4811	kimberly.boykin-johnson@conti-na.com
WALTERS, BRETT	Primary Contact	(704) 583-8818	brett.walters@conti-na.com

Attachments
 2 Attachments found, displaying all Attachments.

Attachment Title	attachmentDate
INTENT TO AWARD 5400001196.DOC	11/19/2009
Ordering Instructions tire-t20.DOC	02/03/2011

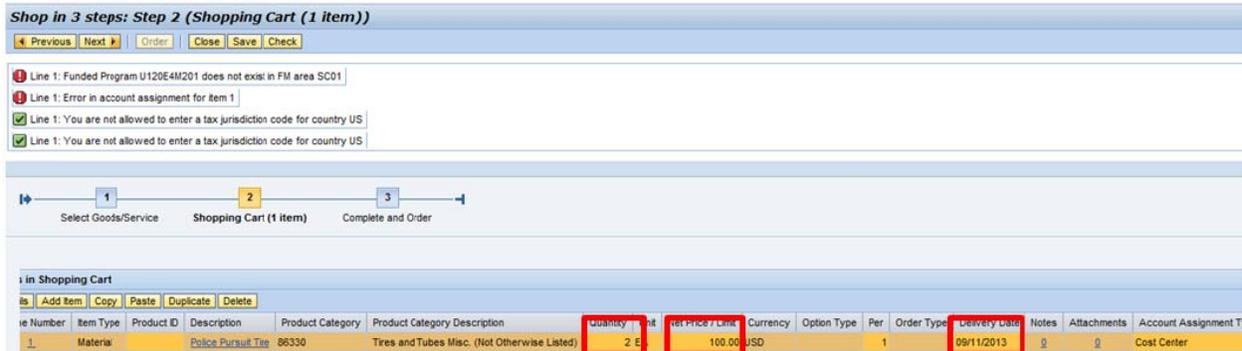
Contract Items
 6 Items found, displaying all Items.

Item Pricing	
<input checked="" type="checkbox"/> 00001 Police Pursuit Tire Material Group: 86330 - Police Pursuit Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-39.0 % per 0
<input type="checkbox"/> 00002 Auto Radial Tire Material Group: 86305 - Auto Radial Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-39.0 % per 0
<input type="checkbox"/> 00003 Light Truck Radial Tire Material Group: 86307 - Light Truck Radial Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-39.0 % per 0
<input type="checkbox"/> 00004 Light Truck Bias Tire Material Group: 86307 - Light Truck Bias Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-39.0 % per 0
<input type="checkbox"/> 00005 Medium Truck Radial Tire Material Group: 86310 - Medium Truck Radial Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-42.0 % per 0
<input type="checkbox"/> 00006 Medium Truck Bias Tire Material Group: 86310 - Medium Truck Bias Tire Agency: STATEWIDE TERM CONTRACT	Gross Price:\$0.01 (each) SC Discount Percent:-42.0 % per 0

7. This will take you back to the contracts for “tires” screen. Click [Punch-out to SRM](#). This will bring you back to the Shopping Cart in SRM.

SRM 7.2 Shopping Cart Creation

- Enter the Quantity (2), Net Price/Limit (\$100.00), Delivery Date (Current Date + 1 week). Press **ENTER** on your keyboard.



Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Previous Next Order Close Save Check

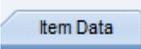
Line 1: Funded Program U120E4M201 does not exist in FM area SC01
 Line 1: Error in account assignment for item 1
 Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

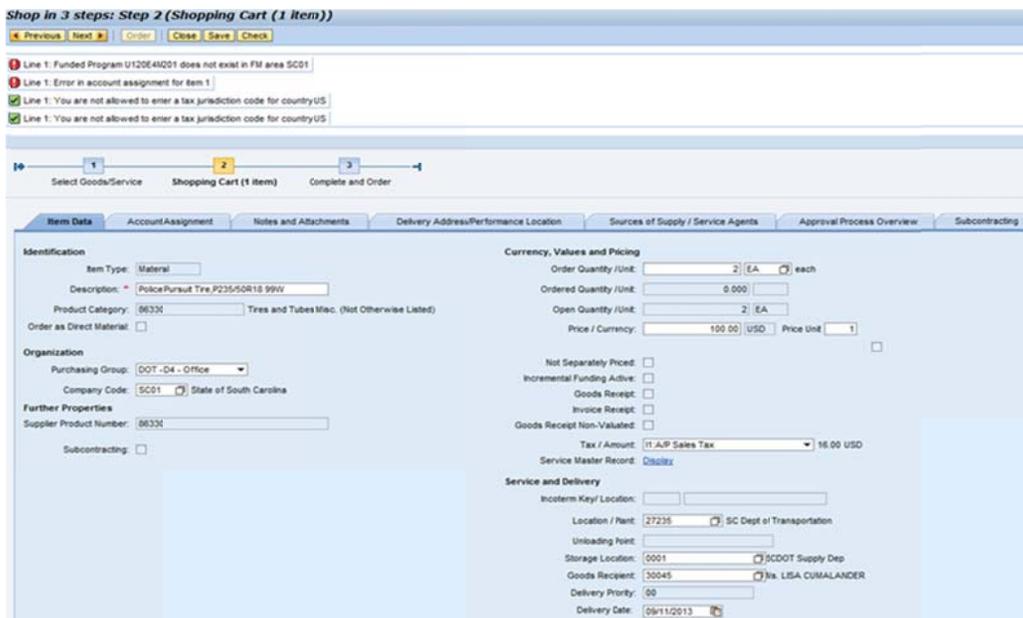
Items in Shopping Cart

Item Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery date	Notes	Attachments	Account Assignment T
1	Material		Police Pursuit Tire	86330	Tires and Tubes Misc. (Not Otherwise Listed)	2	EA	100.00	USD		1		09/11/2013			Cost Center

Note the funding error messages. They should disappear as the Shopping Cart is completed and the funding is correct

- Click the Details button found under “Items in Shopping Cart.” Open, verify and update information in the “Item Data” section . You may need to update the Description Field to reflect what you are purchasing. In this example, change to **Police Pursuit Tire P235/50R18**.

Verify the Purchasing Group, Company Code SC01, Quantity (2), Price Currency (100.00), Price Unit (1), Tax/Amount (11 A/P Sales Tax), your agency’s Location/Plant, Storage Location Delivery Date.



Shop in 3 steps: Step 2 (Shopping Cart (1 item))

Previous Next Order Close Save Check

Line 1: Funded Program U120E4M201 does not exist in FM area SC01
 Line 1: Error in account assignment for item 1
 Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US

1 Select Goods/Service 2 Shopping Cart (1 item) 3 Complete and Order

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location Sources of Supply / Service Agents Approval Process Overview Subcontracting

Identification
 Item Type: Material
 Description: Police Pursuit Tire P235/50R18 99W
 Product Category: 86330 Tires and Tubes Misc. (Not Otherwise Listed)
 Order as Direct Material:

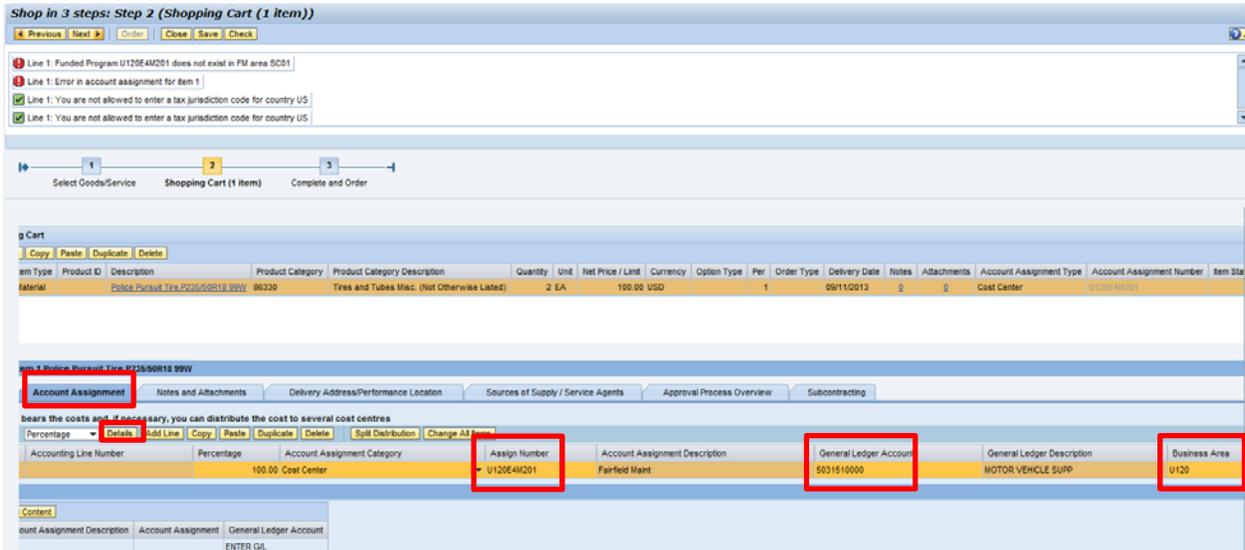
Organization
 Purchasing Group: DOT_D4 - Office
 Company Code: SC01 State of South Carolina

Further Properties
 Supplier Product Number: 86330
 Subcontracting:

Currency, Values and Pricing
 Order Quantity / Unit: 2 EA each
 Ordered Quantity / Unit: 0.000
 Open Quantity / Unit: 2 EA
 Price / Currency: 100.00 USD Price Unit: 1

Service and Delivery
 Incoterm Key / Location:
 Location / Plant: 27235 SC Dept of Transportation
 Unloading Point:
 Storage Location: 0001 SC DOT Supply Dep
 Goods Recipient: 30045 Jha, LISA CUMALANDER
 Delivery Priority: 00
 Delivery Date: 09/11/2013

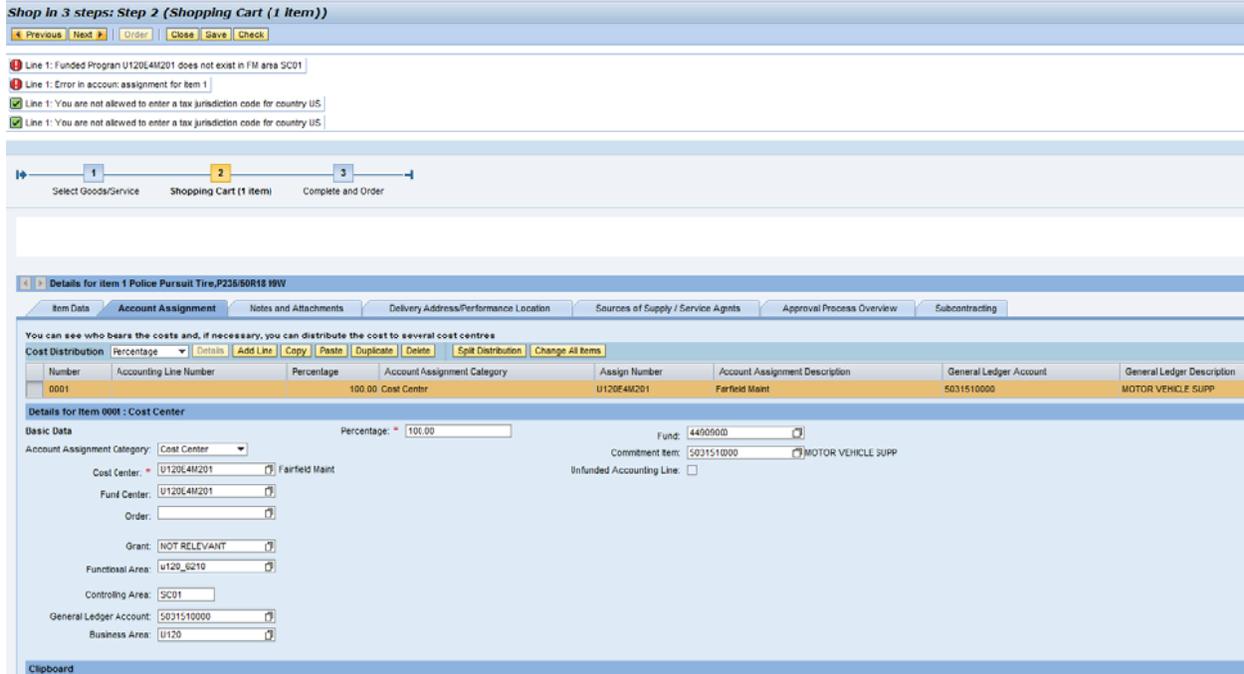
10. Under the **Account Assignment** tab, The General Ledger Account and the General Ledger Description are mapped to the Product Category (NIGP) number and are defaulted. Enter the cost center number in the “Assign Number” field. Press the “Enter” key on your keyboard. The Business Area field will automatically populate.



11. Complete the Cost Assignment Section by clicking “Details.” The “Details” button is located directly below the Account Assignment tab (highlighted above).

SRM 7.2 Shopping Cart Creation

12. Note the Cost Center and G/L are carried over to the “Details” screen, and the Fund Center and Commitment items have populated. Enter your agency’s **Fund, Functional Area and use “Not Relevant” as the Grant.**



13. Click **Check** at the top of screen to check for any Account Assignment errors.

14. Complete the Notes and Attachments section **Notes and Attachments**. Enter **“Please call prior to delivery”** in the “Notes” section, Category: Vendor Text. Click Ok



Note: **“Vendor Text”** is a note to the vendor that will print on the Purchase Order. When using Category: **“Internal Note,”** this is an internal note to the buyer only and will not show on the Purchase Order.

SRM 7.2 Shopping Cart Creation

15. An attachment may be added in the “Attachments” Section (highlighted)

Shop in 3 steps: Step 2 (Shopping Cart (1 Item))

Previous Next Order Close Save Check

Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US

1 Select Goods/Service 2 Shopping Cart (1 Item) 3 Complete and Order

Items in Shopping Cart

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Unit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Number
1	Material	Police Pursuit Tire,P235/50R18 99W		86330	Tires and Tubes Misc. (Not Otherwise Listed)	2	EA	100.00	USD		1		09/11/2013		0	Cost Center	9120846201

Details for item 1 Police Pursuit Tire,P235/50R18 99W

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location Sources of Supply / Service Agents Approval Process Overview Subcontracting

Notes

Clear

Category	Description
Vendor Text	Please call prior to delivery
Internal Note	Empty

Attachments

Add Attachment Add Description Versioning Delete Create Profile

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by
The table does not contain any data									

16. On the **Delivery Address/Performance Location** tab, verify the Ship-to Information is correct. This information defaults from your User ID address.

Shop in 3 steps: Step 2 (Shopping Cart (1 Item))

Previous Next Order Close Save Check

Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US

1 Select Goods/Service 2 Shopping Cart (1 Item) 3 Complete and Order

Items in Shopping Cart

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Unit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Number
1	Material	Police Pursuit Tire,P235/50R18 99W		86330	Tires and Tubes Misc. (Not Otherwise Listed)	2	EA	100.00	USD		1		09/11/2013		0	Cost Center	9120846201

Details for item 1 Police Pursuit Tire,P235/50R18 99W

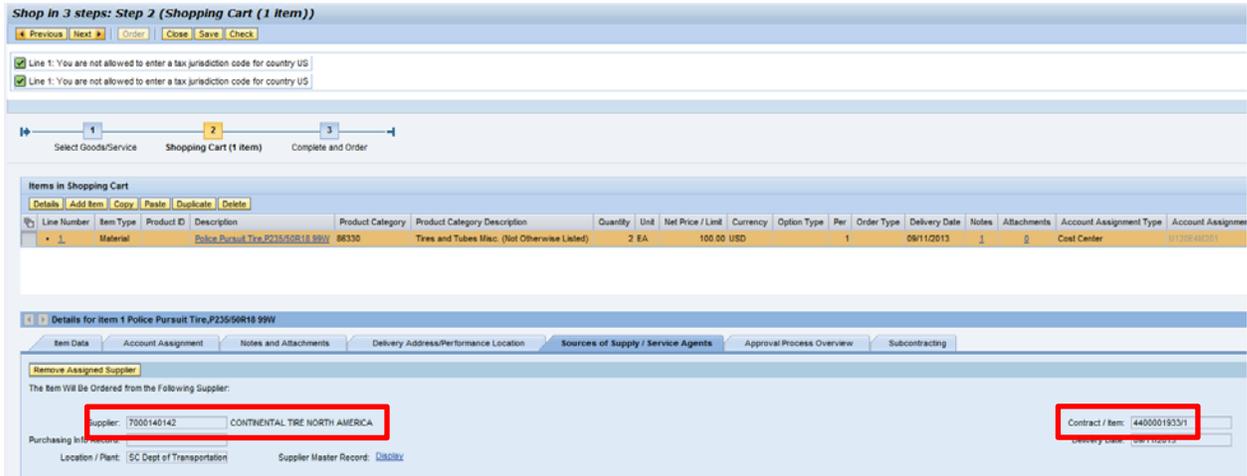
Item Data Account Assignment Notes and Attachments **Delivery Address/Performance Location** Sources of Supply / Service Agents Approval Process Overview Subcontracting

Reset Please change all the address details and RESET.
 If the item is to be delivered to a different address, enter the new address here

Name: <input type="text" value="SOEIS Root"/>	Additional Name: <input type="text" value="The State of South Carolina"/>
C/O: <input type="text" value="DOT - District 4 Office"/>	Phone Number / Extension: <input type="text" value="(803) 377-4155"/>
Fax Number/Extension: <input type="text" value="(803) 581-2088"/>	E-Mail: <input type="text" value="Dumeland.LL@scdot.org"/>
Building: <input type="text"/>	Floor / Room: <input type="text" value="21"/>
Street / House Number: <input type="text" value="J.A. Cochran Bypass 1232"/>	Postal Code / City: <input type="text" value="29706-2193 Chester"/>
District: <input type="text"/>	Postal Code / P.O. Box: <input type="text"/>
Country: <input type="text" value="US"/> USA	Region: <input type="text" value="SC"/> South Carolina

SRM 7.2 Shopping Cart Creation

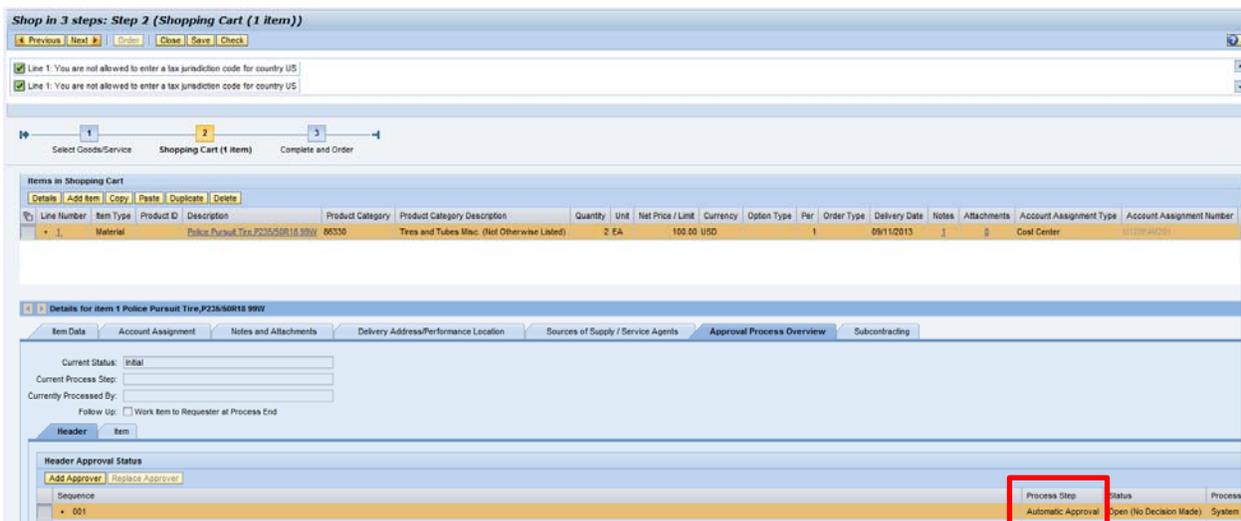
- On the **Sources of Supply / Service Agents** tab, the supplier will default from the contract we chose in our Contract Search. We selected Contract 4400001933 (highlighted), which is tied to Continental Tire North America as the supplier (highlighted).



The screenshot shows the 'Sources of Supply / Service Agents' tab for a shopping cart item. The 'Supplier' field is populated with '7000140142 CONTINENTAL TIRE NORTH AMERICA'. The 'Contract / Item' field is populated with '44000019331'. The 'Delivery Date' field is empty.

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Par	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Number
1	Material	Police Pursuit Tire,P235/50R16 99W		86330	Tires and Tubes Misc. (Not Otherwise Listed)	2	EA	100.00	USD		1		09/11/2013			Cost Center	44000019331

- Click the **Approval Process Overview** tab. Note the "Process Step." The Shopping Cart Creator has approval authority under \$2500. The example in this scenario is under \$2500, thus is automatically approved.



The screenshot shows the 'Approval Process Overview' tab for the same shopping cart item. The 'Process Step' is 'Automatic Approval' and the 'Status' is 'Open (No Decision Made)'. The 'Process' is 'System'.

Sequence	Item	Process Step	Status	Process
001		Automatic Approval	Open (No Decision Made)	System

19. Click **Check** at the top of the screen to verify all information is correct. Once all is “green,” click the **Next** button also located at the top of the screen. This takes you to “Shop in 3 steps: Step 3 (Complete and Order) screen.”
20. Name your Shopping Cart.
21. Once the Shopping Cart has been named and the Shopping Cart is in “green” status, click the **Order** button located at the top of the screen.

Shop in 3 steps: Step 3 (Complete and Order)

Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US

1 ————— 2 ————— 3

Select Goods/Service Shopping Cart (1 item) Complete and Order

Name of shopping cart
 Number: 2000487819
 Approval Process: [Display / Edit Agents](#)
 Header Approval Note:
 Budget: [Display](#)

You have successfully created a Shopping Cart from an existing contract!



Note: The Shopping Cart number is at the top of the screen (highlighted).

Shop in 3 steps

Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Line 1: You are not allowed to enter a tax jurisdiction code for country US
 Shopping cart "Pursuit Tires 09112013" with number 2000487819 ordered successfully

Items in Shopping Cart

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Number
1	Material	P235/50R18 99W	Police Pursuit Tire	86330	Tires and Tubes Misc. (Not Otherwise Listed)	2	EA	100.00	USD		1		09/11/2013	1	0	Cost Center	0120E-AR021

What do you want to do next?
You can now [print this shopping cart](#) or [continue shopping](#)
[Print Preview](#)
[Shop Again](#)