

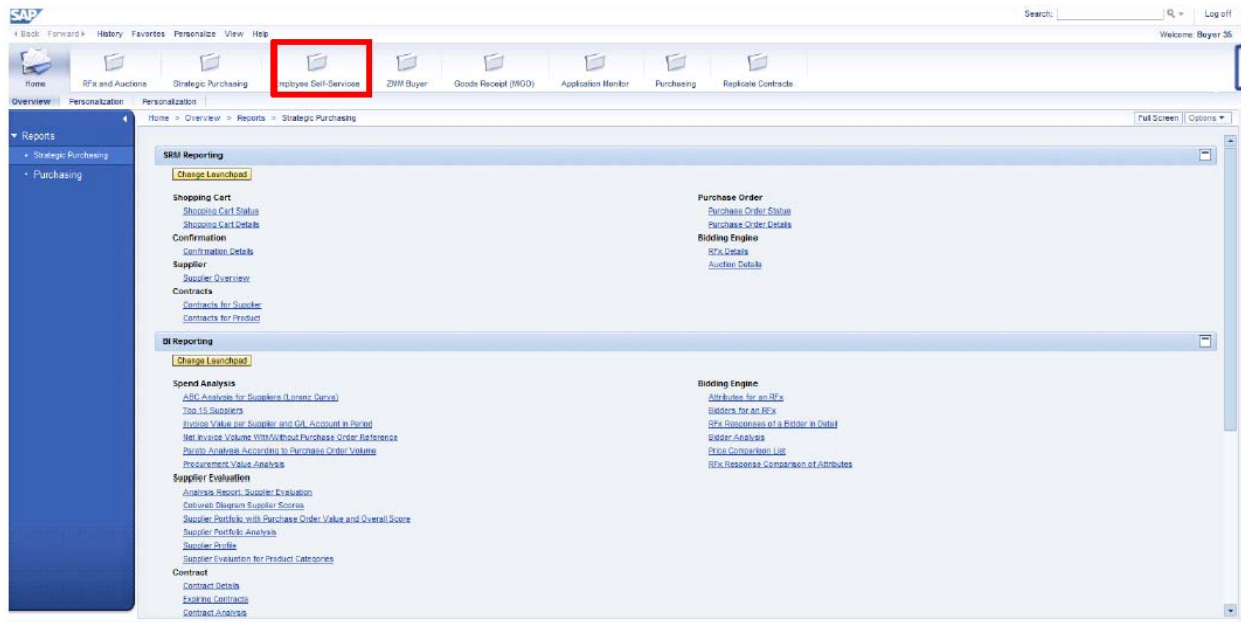
Create a Shopping Cart from a Punch-Out Catalog

Exercise 3

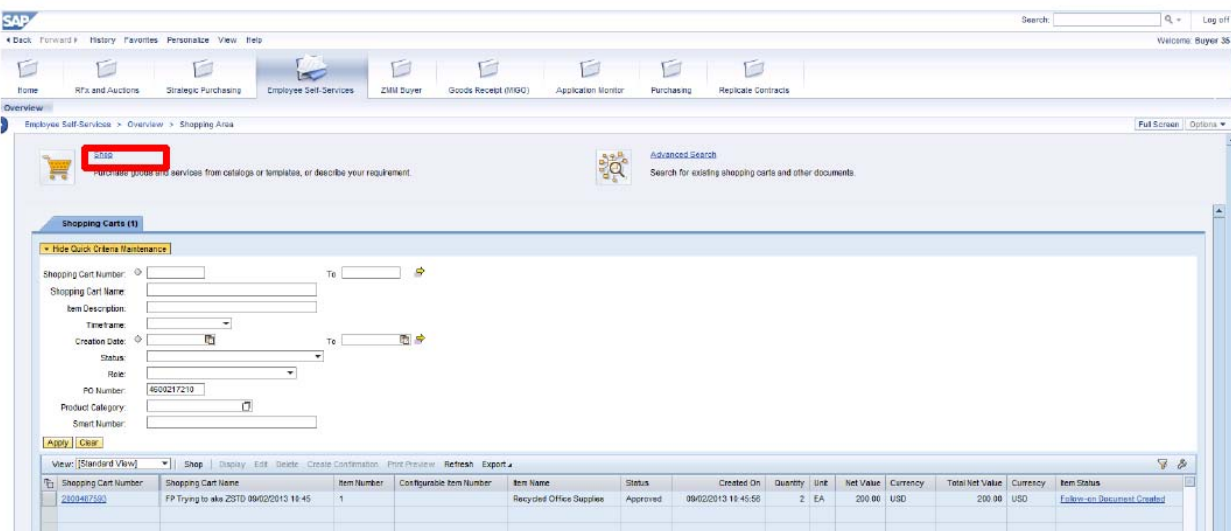
Exercise 3: Create a Shopping Cart from a Punch Out Catalog

Create a shopping cart from a “Punch Out Catalog” and add an attachment. In this exercise, we will use Staples as our punch out catalog.

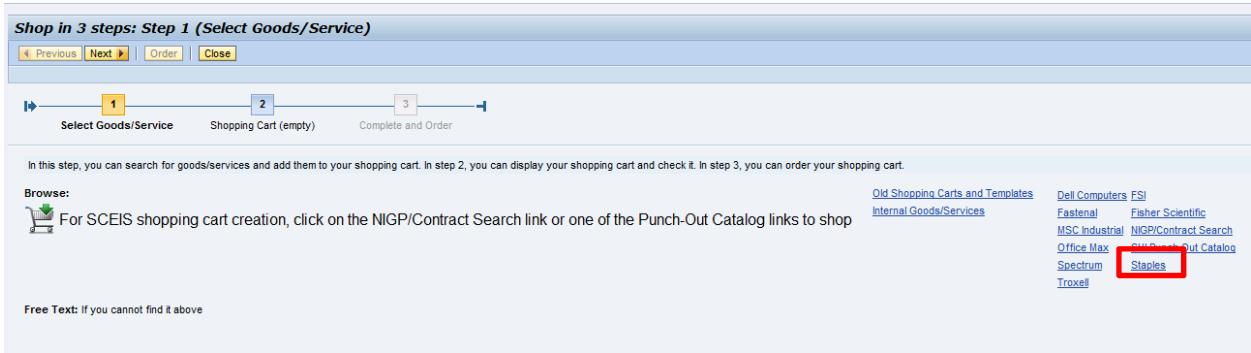
1. Select “Employee Self-Services.”



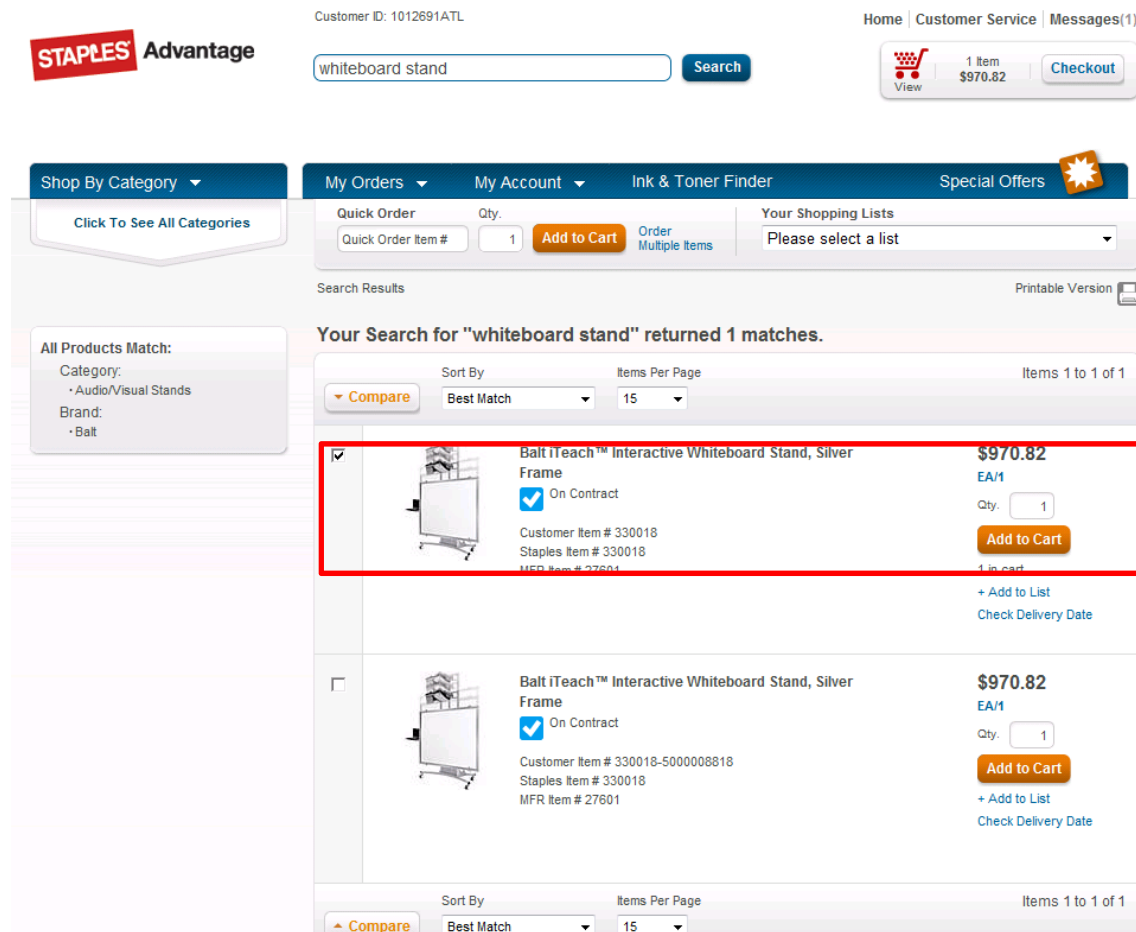
2. From the “Employee Self Services” screen click “Shop.”



3. "Shop in 3 steps: Step 1"



4. Select "Staples" as the punch out catalog. Once in the Staples website, enter "whiteboard stand" in the search criteria and Search. Choose Staples Item #330018 by checking the box next to the item, change the quantity to 1 and click **Add to Cart**. The checkout located at the top of your screen updates with total cost and number of items in the Staples shopping cart. Click **Checkout**.



- 5. The next screen is a summary of the material being purchased. Verify “Balt iTeach Interactive Whiteboard Stand, Silver Frame, Staples #330018.” Also verify the price per each and item total. Click the **Submit** button located at the bottom of the screen.

Your Shopping Cart : **Review Item Information**

Sort By
Please select

		Item Total	Remove an Item
	Balt iTeach™ Interactive Whiteboard Stand, Silver Frame <input checked="" type="checkbox"/> On Contract Customer Item # 330018 Staples Item # 330018 MFR Item # 27601	\$970.82 EA/1 Qty. <input type="text" value="1"/> Check Delivery Date	\$970.82 <input type="checkbox"/>

Packing Slip Note:

View all delivery dates

Sort By
Please select

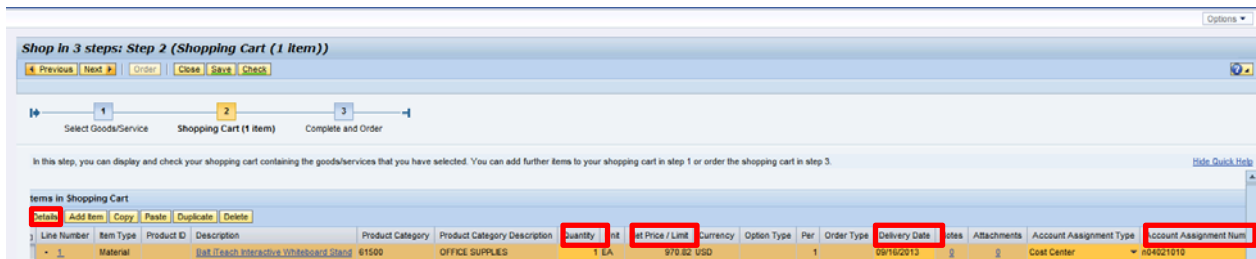
Order Summary

Subtotal:	\$970.82
Total:	\$970.82

Continue shopping Clear cart Update cart **Submit**

SRM 7.2 Shopping Cart Creation

6. Once submitted, you are at the SRM Shopping Cart screen “Shop in 3 steps: Step 2.”
7. Verify the item, quantity, unit, price from catalog; change the delivery date to today’s date + one week and add your agency “Account Assignment Number.” The Account Assignment Category defaults to “Cost Center.”



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

← Previous Next → Order Close Save Check

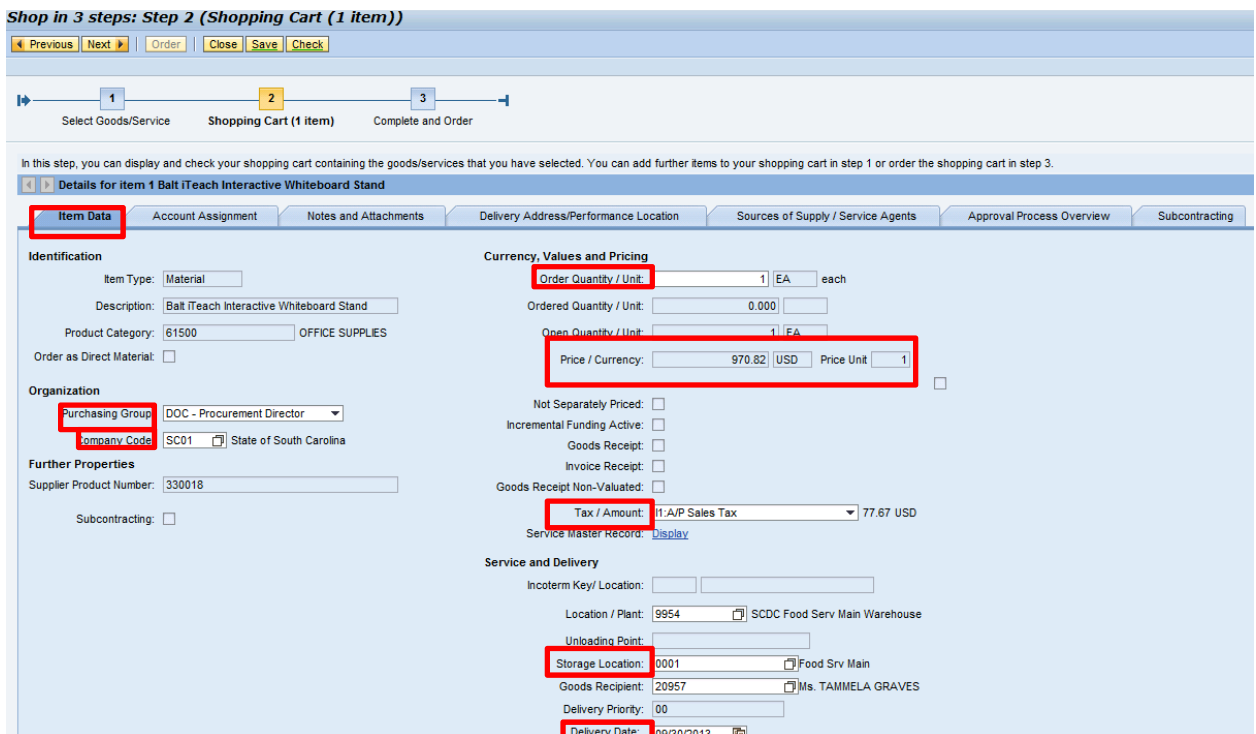
1 Select Goods/Service 2 Shopping Cart (1 Item) 3 Complete and Order

In this step, you can display and check your shopping cart containing the goods/services that you have selected. You can add further items to your shopping cart in step 1 or order the shopping cart in step 3.

Items in Shopping Cart

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Unit Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignment Num.
1	Material	Balt iTeach Interactive Whiteboard Stand		61500	OFFICE SUPPLIES	1	EA	970.82	USD		1		09/30/2013			Cost Center	004021510

8. Click the “Details” button found under the “Items in Shopping Cart” (show above).
9. On the “Item Data” tab, verify the Purchasing Group, Company Code SC01, Quantity (1), Price Currency (\$970.82), Price Unit, Tax Amount (11 A/P Sales Tax), your agency’s Location/Plant, Storage Location and Delivery Date.



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

← Previous Next → Order Close Save Check

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

In this step, you can display and check your shopping cart containing the goods/services that you have selected. You can add further items to your shopping cart in step 1 or order the shopping cart in step 3.

Details for item 1 Balt iTeach Interactive Whiteboard Stand

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: Balt iTeach Interactive Whiteboard Stand
Product Category: 61500 OFFICE SUPPLIES
Order as Direct Material:

Organization

Purchasing Group: DOC - Procurement Director
Company Code: SC01 State of South Carolina

Further Properties

Supplier Product Number: 330018
Subcontracting:

Currency, Values and Pricing

Order Quantity / Unit: 1 EA each
Ordered Quantity / Unit: 0.000
Open Quantity / Unit: 1 EA
Price / Currency: 970.82 USD Price Unit: 1

Not Separately Priced:
Incremental Funding Active:
Goods Receipt:
Invoice Receipt:
Goods Receipt Non-Valuated:

Tax / Amount: 11 A/P Sales Tax 77.67 USD
Service Master Record: Display

Service and Delivery

Incoterm Key/ Location:
Location / Plant: 9954 SCDC Food Serv Main Warehouse
Unloading Point:
Storage Location: 0001 Food Srv Main
Goods Recipient: 20957 Ms. TAMMELA GRAVES
Delivery Priority: 00
Delivery Date: 09/30/2013

Disregard any funding error messages. They should disappear as the Shopping Cart is completed.

SRM 7.2 Shopping Cart Creation

10. Click the Account Assignment tab. Complete the Cost Assignment section by clicking “Details.” The “Details” button is located directly below the Account Assignment tab.

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

Previous Next Order Close Save Check

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

In this step, you can display and check your shopping cart containing the goods/services that you have selected. You can add further items to your shopping cart in step 1 or order the shopping cart in step 3.

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Upton Type	Per	Order type	Delivery Date	Notes	Attachments	Account Assignment Type	Account As
1	Material		Ball Teach Interactive Whiteboard Stand	61500	OFFICE SUPPLIES	1	EA	970.02	USD		1		09/16/2013	0	0	Cost Center	N04021010

Details for item 1 Ball Teach Interactive Whiteboard Stand

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

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	N04021010		5030010000	OFFICE SUPPLIES

Details for Item 0001 : Cost Center

Basic Data Percentage: 100.00 Fund:

Account Assignment Category: Cost Center Fund:

Cost Center: N04021010 Commitment Item: 5030010000 OFFICE SUPPLIES

Fund Center: Unfunded Accounting Line:

Order:

Grant: NOT RELEVANT

Functional Area:

Controlling Area: SC01

General Ledger Account: 5030010000

Business Area:

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

12. Click the “Check” button at the top of the screen to check for any Account Assignment errors.

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

In this step, you can display and check your shopping cart containing the goods/services that you have selected. You can add further items to your shopping cart in step 1 or order the shopping cart in step 3.

Details for item 1 Ball Teach Interactive Whiteboard Stand

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

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	Business
0001		100.00	Cost Center	N04021010	Facilities Maintenance	5030010000	OFFICE SUPPLIES	N040

Details for Item 0001 : Cost Center

Basic Data Percentage: 100.00 Fund: 10010000 GENERAL FUND

Account Assignment Category: Cost Center Fund: 10010000 GENERAL FUND

Cost Center: N04021010 Facilities Maintenance Commitment Item: 5030010000 OFFICE SUPPLIES

Fund Center: N04021010 Unfunded Accounting Line:

Order:

Grant: NOT RELEVANT

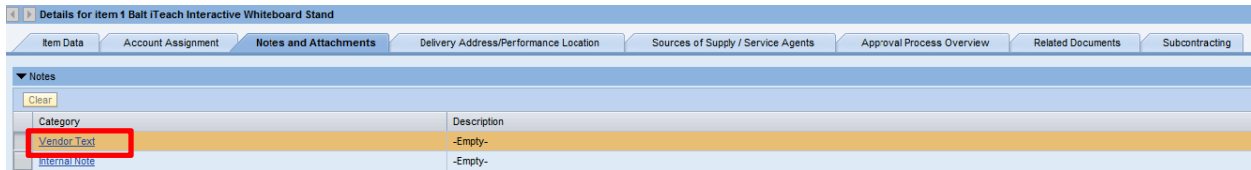
Functional Area: N040_M241 N040 Maintenance

Controlling Area: SC01

General Ledger Account: 5030010000

Business Area: N040

13. Complete the Notes and Attachment Section. Enter “**Please call prior to Delivery**” in the “Notes Section, Category: Vendor Text”.



Details for item 1 Balt iTeach Interactive Whiteboard Stand

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

Notes

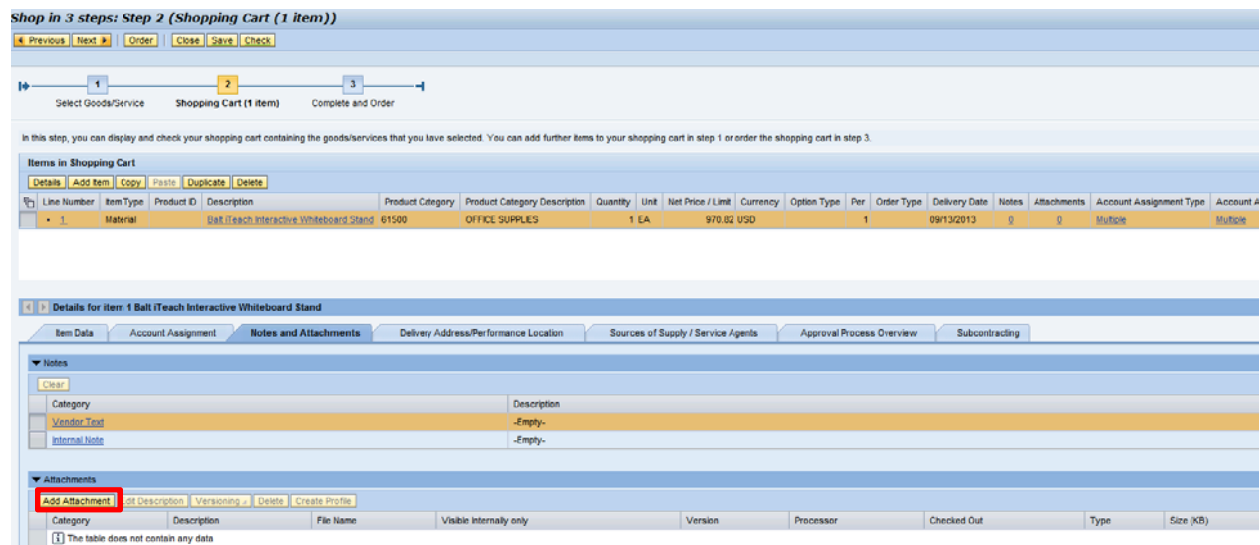
Clear

Category	Description
Vendor Text	-Empty-
Internal Note	-Empty-



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 only and will not show on the Purchase Order.

14. An attachment may be added in the attachments section by clicking “Add Attachment” located in the “Attachment” section under the “Notes” section.



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

Previous | Next | Order | Close | Save | Check

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

In this step, you can display and check your shopping cart containing the goods/services that you have selected. You can add further items to your shopping cart in step 1 or order the shopping cart in step 3.

Items in Shopping Cart

Details | Add Item | Copy | Paste | Duplicate | Delete

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 A
1	Material	Balt iTeach Interactive Whiteboard Stand	61500	OFFICE SUPPLIES		1	EA	970.02 USD			1		09/13/2013	0	0	Multiple	Multiple

Details for item 1 Balt iTeach Interactive Whiteboard Stand

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	-Empty-
Internal Note	-Empty-

Attachments

Add Attachment | of Description | Versioning | Delete | Create Profile

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



Note: An attachment can be a multitude of documents, Word, Excel, etc. However, the system will NOT attach an HTML file. Naming of the attachment cannot be longer than 30 characters.

15. A pop up screen will allow you to “Browse” your files for the file you wish to attach.



Note: The browser search that pops up will be check marked for the attachment to be visible internally only. If you would like the vendor to be able to view the attachment, uncheck the box.

16. Once the file is attached, click “OK.”

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

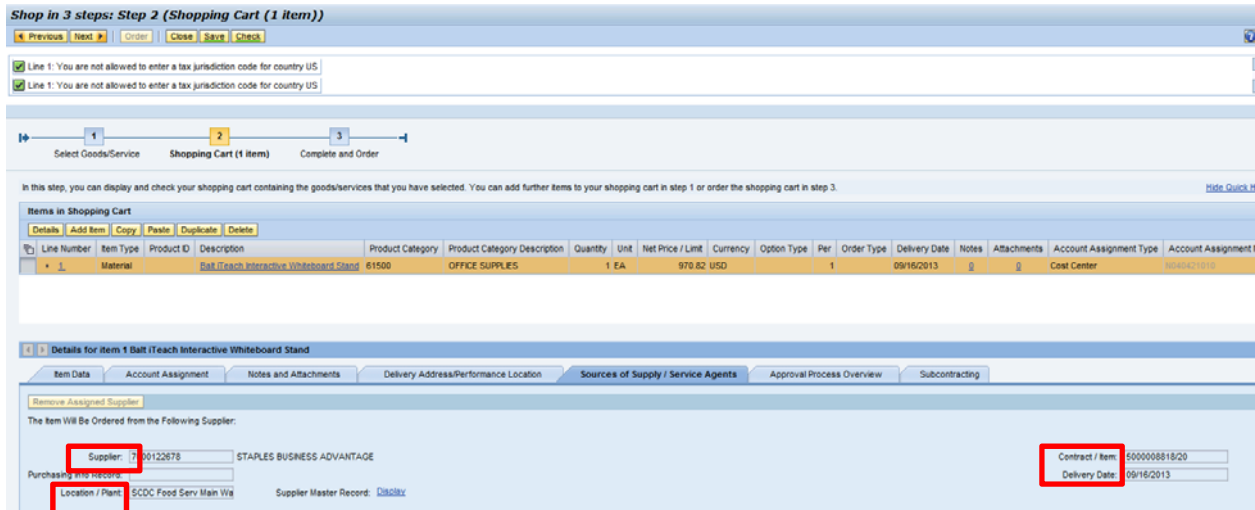
Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per	Order Type	Delivery Date	Notes	Attachments	Account Assignment Type	Account Assignme
1	Material	Ball Teach Interactive Whiteboard Stand	61500	OFFICE SUPPLIES		1	EA	979.82	USD		1		09/16/2013			Cost Center	W00421010

Details for item 1 Ball Teach Interactive Whiteboard Stand

Name: SCEIS Root
 CIO: SCDC - Facilities Management
 Fax Number/Extension: (803) 896-1703
 Building:
 Street / House Number: Broad River Rd 4322
 District:
 Country: US USA

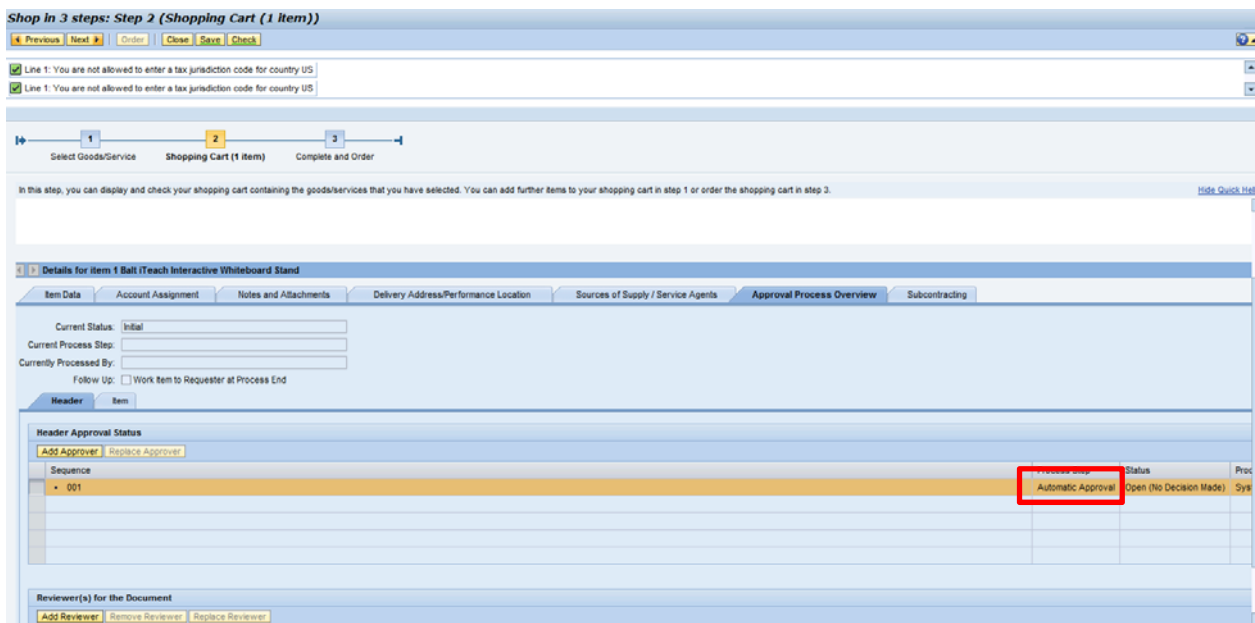
Additional Name: The State of South Carolina
 Phone Number / Extension: (803) 896-8541
 E-Mail: Scot.Sharon@doc.state.sc.us
 Floor / Room:
 Postal Code / City: 29210-4012 Columbia
 Postal Code / P.O. Box:
 Region: SC South Carolina

18. On the **Sources of Supply / Service Agents** tab, the supplier will default from the Staples Punch Out Catalog. Note the Supplier, Location/Plant, Contract Number and Delivery Date defaulted.



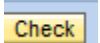
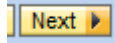
The screenshot shows the 'Sources of Supply / Service Agents' tab for item 1. The 'Supplier' field is populated with 'STAPLES BUSINESS ADVANTAGE' and the 'Location / Plant' is 'SCDC Food Serv Main Wa'. The 'Contract / Item' is '600000818/20' and the 'Delivery Date' is '09/16/2013'. The 'Remove Assigned Supplier' button is visible at the top left of the details section.

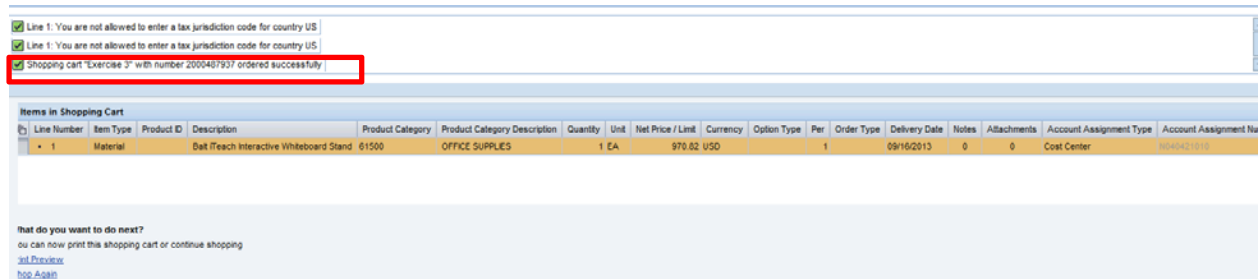
19. Click the **Approval Process Overview** tab. Note the "Process Step." This Shopping Cart Creator has approval authority under \$2500. The example in this scenario is under \$2500, thus is automatically approved.



The screenshot shows the 'Approval Process Overview' tab. The 'Current Status' is 'Initial'. The 'Header Approval Status' table shows a sequence of 001 with an 'Automatic Approval' status and 'Open (No Decision Made)'. The 'Reviewer(s) for the Document' section is empty.

Sequence	Approval Status	Status	Proc
001	Automatic Approval	Open (No Decision Made)	Sys

20. Click  at the top of the screen to verify all information is correct. Once all is “green,” click the  button also located at the top of the screen. This takes you to “Shop in 3 steps: Step 3 (Complete and Order).”
21. Name your Shopping Cart.
22. 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.



You have successfully created a Shopping Cart from a Punch Out Catalog!

Note: The Shopping Cart Number created (highlighted).

Enter Shopping Cart Number: _____