Free Text Shopping … Formerly known as *Describe Requirments*

Click on Shop Tab, click on Shopping Cart under Create Documents

A new Window will appear, click box to view in full screen
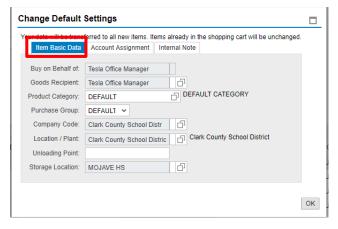
Each line in the quote must have a matching line in the shopping cart. If your quote has 10 lines, the shopping cart must have 10 lines. **Free items** listed on the quote must also be in the shopping cart, with a price of one cent ($0.01). Total value of shopping cart should equal the quote value plus the value of the free items.
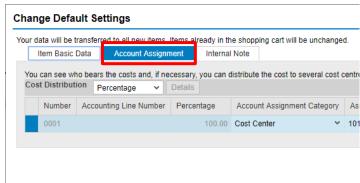
Before you add any items to the shopping cart, change the Default Settings*. Every item added after the change will use the settings. Product Category must be changed from DEFAULT or the shopping cart will get errors. For example, replace DEFAULT with 4300 for Computers/Technology.

If you do not know which product category to use, contact the Purchasing Department and ask for the buyer for the products you are ordering. Setting the correct product category in Default Settings before adding items to your shopping cart will speed up processing for your order.

Change Default Settings*, e.g. Product Category, Storage Location, and/or Account Assignment, before adding items to shopping cart

* Default Settings are not saved when the shopping cart is closed. If you are editing a saved shopping cart, you will need to set the Default Settings again. Default Settings only affect new items, they do not change existing items.

Click Add Item, choose **Free Text** from the pull down menu. Please note, the **Describe Requirements** option has been replaced with the **Free Text** option.
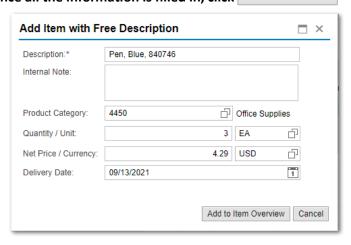
A pop-up window will appear.

Here are notes on free text items for general items, Office Supplies, Library Books, and Textbooks.

General Items or Office Supplies (4450)
Fill in all required areas (see example below)
- **Description:** Noun, Adjectives, Supplier Part #
- **Internal Note:** Leave blank. Item information should be in the quote.
- **Product Category:** Contact the Purchasing Department if you don't know which one to use. Using DEFAULT will cause an error message.
- **Quantity/Unit** (Unit of Measure is often EA for each)
- **Net Price** (Currency is always USD - U.S. Dollars)

Once all the information is filled in, click Add to Item Overview

Hints:

Use upper/lower case for maximum readability. (DON'T SHOUT.)

Description can be up to 40 characters long. Use the Internal Note for more details.

Use a meaningful Description:
Pen, Blue, 840746 is useful
Office Supplies is too general, causes extra work and will delay your cart.

Providing the Supplier Part # will speed up processing.

Information about a grant, not to exceed amount, delivering to, and/or contact person should be put in the Approval Note in the General Data (header) section of the shopping cart.

Library Books (5400) and Books Ref & Non-text (5405)
Fill in all required areas (see example below)
- **Description: ISBN** (Do not put dashes or spaces in the ISBN.)
- **Internal Note:** Leave blank if the ISBN is in the Description.
- **Product Category: 5400 or 5405**
- **Quantity/Unit** (Unit of Measure is often EA for each or SET)

Note: The International Standard Book Number (ISBN) is important for identifying exactly which book you want. The same title will have different ISBNs for different editions, hardback, paperback, audio books, e-books, etc.

Ingram Catalog only: Description should be ISBN only.

- **Net Price** (Currency is always USD - U.S. Dollars)

Once all the information is filled in, click `Add to Item Overview`

If you are not sure what product category or unit of measure to use, you can search for them or call the Purchasing Department for assistance.

If you did not change the Product Category in Default Settings before adding items to the shopping cart, you will have to change it on every single item.

Click the Product Category search icon to find a category

Click the Unit search icon to find a Unit (each, set, case, etc.)

Be sure to use the * at the beginning and/or end of the Description

Hint:
If you leave the boxes blank and just click `Start Search`, you will see a list of all Product Categories.

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID: [   ]
Description: [computer*]
Logical System: [   ]
☑ Restrict Number of Value List Entries   500

[Start Search] [Reset]

Search Result

Description	Category ID	Logical System
Computers/Technology	4300	QSSCLNT310
Computers/Servers	4310	QSSCLNT310

[OK] [Cancel]

Highlight the line, then click the [OK] button

DON'T FORGET to add a line for shipping. Use the shipping charge from the quote. If it is not on the quote, contact the Purchasing Department buyer to see if shipping should be added. **The Product Category for shipping is the same as for the ordered items**, and Quantity/Unit is 1/EA. For example, if you are ordering Science supplies, product category 6300, use the same product category, 6300, for shipping. Note that using a different product category will slow down processing.

Some suppliers on contract with CCSD have specific shipping rates.

Supplier	Rate
Ingram	Included in book price, does not need to be listed.
Mountain States Book Repository	3%

Add Attachment to the First Line of the Shopping Cart

Highlight the first line and click on [Details] to go to Details for item area at the bottom of the window.

▼ Item Overview

[Details] [Add Item ▾] [Copy] [Paste] [Duplicate] [Delete]

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	
1	Material		Robot to teach science	4300	Computers/Technology	
	Undefined Item Type			DEFAULT	DEFAULT CATEGORY	

Click Notes and Attachments tab and click on Add Attachment. Attachments are usually quotes and other information that will be helpful to ensure that the correct item can be ordered.

Do not add Vendor Text. This field is for use by the Purchasing Department. If you add Vendor Text, it will end up being deleted, wasting your time and ours. Put the information in the Approval Note. Item specific information should already be in the attached quote.

Click the Check button. If you have forgotten to add all pertinent information, a reminder will appear on the top area of the screen:

(These errors mean the Unit of measure is missing.)

When you are ready to order, click the Order button

New Shopping Cart # has been ordered successfully

Display Document:

Always use the [Close] button to close the shopping cart.

Edit | Close | Print Preview | Show my Tasks | Refresh

✅ Shopping cart "ZOFFICEMGR 05/27/2020 11:20" with number 3910363 ordered successfully

Number 3910363   Document Name ZOFFICEMGR 05/27/2020 11:20   Status Awaiting Approval   Created On 05/27/2020 11:20:01
Created By Tester Office Manager

▼ General Data

Buy on Behalf of:	104743	Tester Office Manager	Delivery Instruction:		Approval No
Name of shopping cart:	ZOFFICEMGR 05/27/2020 11:20		Use Delivery Date for all Items: ☐	
Approval Process:	Display / Edit Agents			
Document Changes:	Display			
Delivery date:				

Note:

You can make changes to a shopping cart if it is **Saved** or if it has been **Ordered**, but **not yet approved**.

Click the [✏ Edit] button to edit the shopping cart.

Display Document:

[✏ Edit] | Close | Print Preview | Show my Tasks | Refresh

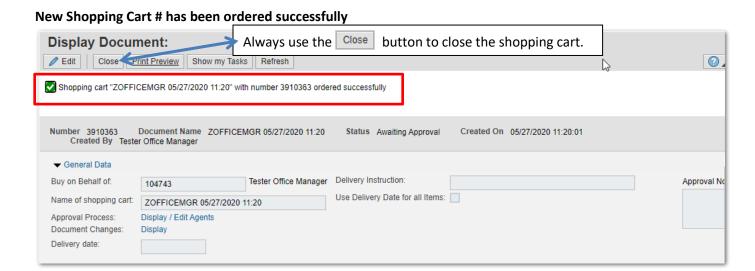Default Settings that were used before will have changed again before adding new items.

Reminder: If you need to make any changes, such as Account Assignment, click on the tab in the Details for item area at the bottom of the shopping cart window.

Please note that you must be in the Edit mode to make any changes

Edit Shopping Cart

Close | Print Preview | Save | Check | Delete

Number 3910363   Document Name ZOFFICEMGR 05/27/2020 11:20   Status Awaiting Approval   Created On 05/27/2020 11:20:01   Created By Tester Office Manager

◀ ▶ **Details for item 1 Robot to teach science**

Item Data | Account Assignment | Notes and Attachments | Sources of Supply / Service Agents | Approval Process Overview | Related Documents

Identification

Product ID:			**Currency, Values and Pricing**		
Description:*	Robot to teach science		Order Quantity / Unit:	1	EA	Each
Catalog:			Price / Currency:	13.00	USD	Price Unit	1
Product Category:	4300	Computers/Technology	Tax / Amount:	I0:Tax-exempt	0.00 USD	

Organization

			Incoterm Key/ Location:		
Purchasing Group:	Haley Ficklin1	Show Members	Plant / Location:	1000	12	Clark County School District
Company Code:	CCSD	Clark County School Distr	Unloading Point:		

Further Properties

Supplier Product Number:			Storage Location:	0038	TROPICAL PARKWAY
Delivery date:			Goods Recipient:	104743	Tester Office Manager
Use Delivery Date for all Items: ☐			Delivery Date:	05/27/2020	

| | | Special Program: | |
| | | Fiscal Year: | 2020 |