

CREATING A SHOPPING CART REQUISITION AGAINST AN EXISTING SRM CONTRACT USING THE INTERNAL GOODS/SERVICES CATALOG

The SRM end user needs to create a shopping cart order for items that are covered under an existing SRM Contract, but the contract has not been loaded into the SRM Material/Services Contract Catalog.

Note: Not all contracts that are loaded into SRM (not SAP) are made into the MSCC catalog contracts. Also, you can create shopping carts using this method for items found on SRM contracts, not just SAP contracts.

For this example, we will be ordering items from an Xpedx quotation for contract #4600013638.

BACKGROUND

The Internal Goods/Services catalog contains all existing SAP contract line items. When the Product ID is known, use of this catalog can expedite the creation of the cart. After the cart is approved, it workflows to the Purchasing Agent for manual creation of the Purchase Order.

Tip #1: Know the SRM "Product ID". In SAP, they are referenced as Material numbers.

Tip #2: Be aware that a *search* on the SRM "Product Description" can be tricky if you don't know how it is worded. In SAP, the product description is referenced as Short text. A familiarity with the contract's short text(s) can enhance your SRM searches.

Display SW Regular Contract 4400013638

Close Release Edit Copy Check Renew Print Preview Related Links

Contract Number: 4400013638 Smart Number: xpedx LLC Contract Type: SW Regular Contract Status: Released Supplier: 424300 XPEDX LLC Contract Owner: 774369 Pamela Gabriel

Overview Header Items Notes and Attachments Conditions Approval Tracking

General Header Data

Contract Number: 4400013638 Contract Owner: 774369 Pamela Gabriel
 Smart Number: xpedx LLC Target Value/ Currency: 6,000,000.00 USD
☒ Smart Number is External Release Value: 37,041.30 USD
 Contract Description: Janitorial Supplies Basic Contract: ☐
 Supplier: 424300 XPEDX LLC
 Valid From / To: 07/01/2014 - 12/31/2014
 Purchasing Organization: COPA Purchasing Organization
 Purchasing Group: YNZ-1504-DGS BOP MAT Show Members

Items

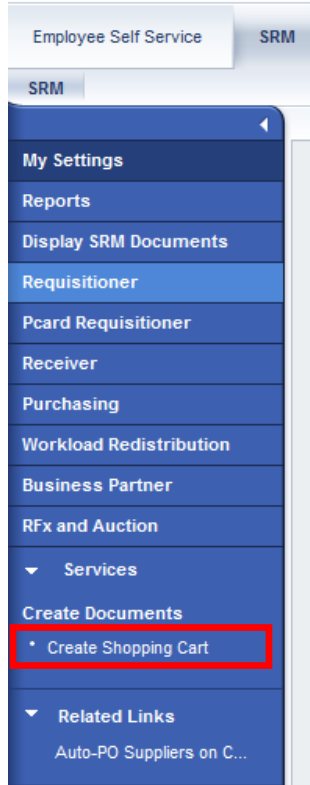
Details Select Add Item Exercise Option Copy Paste Duplicate Delete Filter Settings

Line Number	Item Category	Item Number	Product ID	Description	Product Category	Target Quantity	Option Status	Unit	Target Value	Price	Currency	Price Per	Price Unit	Reference Item Number
1.	Normal	34	318440	PWERD,BLCH CLR SF,2OZ LVR BXD COIN VNC	47130000	0.000		CAR	6,000,000.00	26.00	USD	1	CAR	0
2.	Normal	35	318181	BLEACH,LIQUID,GERMICIDAL 96OZ	47130000	0.000		CAR	6,000,000.00	10.26	USD	1	CAR	0
3.	Normal	36	318213	Cleaner, 1GAL STRIDE CITRUS ALL PURPOSE	47130000	0.000		CAR	6,000,000.00	21.02	USD	1	CAR	0
4.	Normal	37	318258	CLEANER,144 oz pine	47130000	0.000		CAR	6,000,000.00	23.22	USD	1	CAR	0
5.	Normal	38	318261	Cleaner, 27OZ SPIC & SPAN POWDER	47130000	0.000		CAR	6,000,000.00	66.90	USD	1	CAR	0
6.	Normal	39	318235	Disinfectant,13OZ AEROSOL AMPHYL DORINT	47130000	0.000		CAR	6,000,000.00	31.86	USD	1	CAR	0
7.	Normal	40	318268	Cleaner, 1GAL VIREX II 128 GERMICIDAL	47130000	0.000		CAR	6,000,000.00	56.00	USD	1	CAR	0
8.	Normal	41	318221	Cleaner, 32 oz, vanish, non acid bowl	47130000	0.000		CAR	6,000,000.00	19.33	USD	1	CAR	0
9.	Normal	42	318222	Cleaner, Carpet, 32OZ RESOLVE	47130000	0.000		CAR	6,000,000.00	57.05	USD	1	CAR	0
10.	Normal	43	318225	Cleaner, 1QT VIREX TB RTU DISINFECTANT	47130000	0.000		CS	6,000,000.00	30.78	USD	1	CS	0

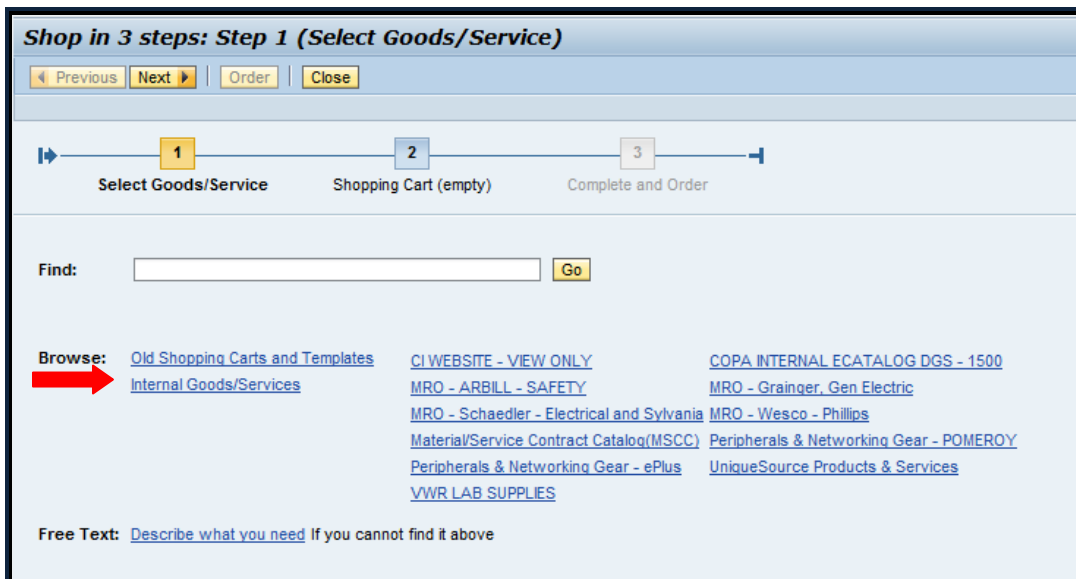
INSTRUCTIONS

Now that we have learned the SAP contract line item Material numbers and the Short text, we will log into SRM and create a cart against line item 20, for Liquid Bleach, Germicidal: Material 318181.

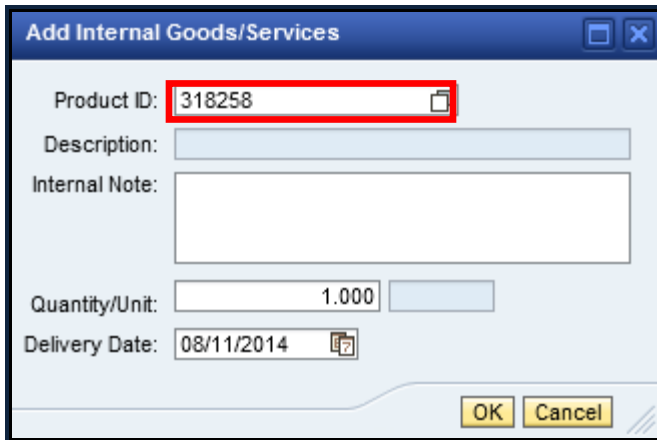
1. After logging into SRM, select the Requisitioner role
2. Select Create Shopping Carts



3. Select the **Internal Goods/Services** Catalog

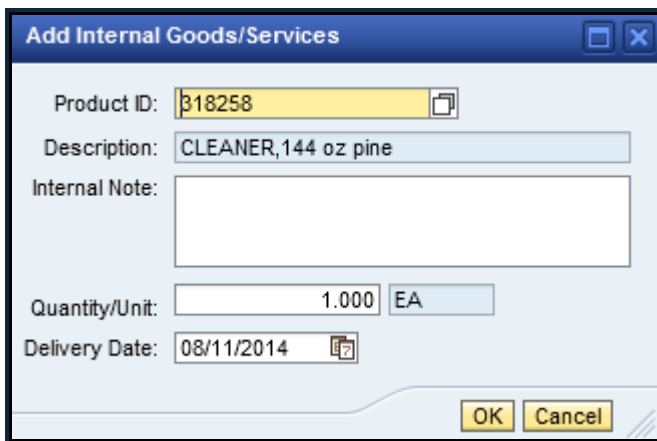


4. Enter the Product ID in the appropriate space
 - a. If the Product ID is not known, select the match code to search for the Product ID



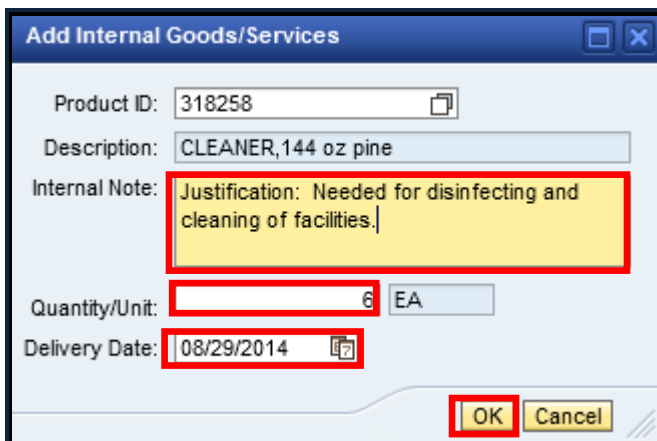
The screenshot shows the 'Add Internal Goods/Services' dialog box. The 'Product ID' field is highlighted with a red rectangle and contains the value '318258'. The 'Description' field is empty. The 'Internal Note' field is empty. The 'Quantity/Unit' field contains '1.000'. The 'Delivery Date' field contains '08/11/2014'. The 'OK' and 'Cancel' buttons are at the bottom right.

Note: The **Internal Goods/Services** area opens up below the catalog links. Also note that the information contained in the search results has auto-populated into the **Description** and **Product** fields.



The screenshot shows the 'Add Internal Goods/Services' dialog box. The 'Product ID' field is highlighted with a yellow rectangle and contains the value '318258'. The 'Description' field contains 'CLEANER,144 oz pine'. The 'Internal Note' field is empty. The 'Quantity/Unit' field contains '1.000' and 'EA'. The 'Delivery Date' field contains '08/11/2014'. The 'OK' and 'Cancel' buttons are at the bottom right.

5. Enter the **Quantity** needed and adjust the **Required on** (delivery) date. If required, add an **Internal Note** to the Purchasing Agent containing additional information regarding the order.
6. Select the **OK** button



The screenshot shows the 'Add Internal Goods/Services' dialog box. The 'Product ID' field is highlighted with a yellow rectangle and contains the value '318258'. The 'Description' field contains 'CLEANER,144 oz pine'. The 'Internal Note' field contains 'Justification: Needed for disinfecting and cleaning of facilities.' and is highlighted with a red rectangle. The 'Quantity/Unit' field contains '6' and 'EA'. The 'Delivery Date' field contains '08/29/2014' and is highlighted with a red rectangle. The 'OK' button is highlighted with a red rectangle.

Note: The item, as well as all corresponding information, has been added to the shopping cart. However, the **Net Price / Limit** field has not yet been completed.

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

Previous Next Order Close Save Check

Workflow Process not defined

Fund must be entered for non-asset account assignment categories

Line 1: No G/L account was entered; enter a G/L account

Line 1: Product 318258 does not exist in plant 1504 or it has been flagged for deletion

Line 1: Error in account assignment for item 1

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

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

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	Item Status	Supplier
1	Material	318258	CLEANER,144 oz pine	47130000	CLNG JANITR SUPPLIES	6.000	EA	0.00 USD			1	1	08/29/2014				None
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1	1	08/11/2014				
Total Value 0.00 USD																	
Tax amount 0.00 USD																	
Total Val. (Gross) 0.00 USD																	

7. Refer to the quote for the price per unit and enter it in the **Net Price/Limit** field

Items in Shopping Cart

Details Add Item Copy Paste Duplicate Delete Filter Settings

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Option Type	Per
1	Material	318258	CLEANER,144 oz pine	47130000	CLNG JANITR SUPPLIES	6.000	EA	0.00 USD			1
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1
*	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.00 USD			1

8. Select the DISPLAY button to open the details for the line item

Note: The fields which are 'grayed' – the system has auto-filled these based on the Product ID.

Details for item 1 CLEANER,144 oz pine

Item Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview

Identification

Item Type: Material

Product ID: 318258

Description: CLEANER,144 oz pine

Product Category: 47130000 CLNG JANITR SUPPLIES

Organization

Purchasing Group: DGS Central Purchase Purchasing Group Show Members

Company Code: COPA COMMONWEALTH OF PA

Further Properties

Supplier Product Number:

Currency, Values and Pricing

Order Quantity / Unit: 6.000 EA Each

Ordered Quantity / Unit: 0.000

Open Quantity / Unit: 6.000 EA

Price / Currency: 0.00 USD Price Unit: 1

Service and Delivery

Location / Plant: 301375 DGS Bureau of Procurement

Storage Location:

Goods Recipient: 703389 Cynthia Anderson

Delivery Date: 08/29/2014

Proceed Using P-CARD?:

9. Expand each of the tabs, as necessary, and enter required data.

10. Under the Sources of Supply tab, note that the SAP Contract number and Line Item are referenced, as well as the Vendor.

a. Select the correct Source of Supply, select the ASSIGN SUPPLIER button

11. After reviewing and/or completing all tabs, select Step 3 – Complete and Order shopping cart

- Name the shopping cart with the proper naming convention as shown below.
 - First 4 digits of the UNSPSC (product category)
 - Space or dash
 - Noun that describes the product or service
- Write down the shopping cart number
- Select DISPLAY/EDIT Agents to Ad Hoc any additional approvers (if applicable)
- Select the CHECK button to Check the shopping cart
- Select the SAVE button to save or ORDER button to process the shopping cart

End.