## 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 <u>Material</u> numbers.

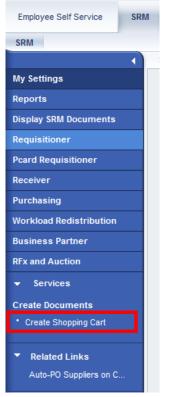
**Tip #2:** Be aware that a *search* on the SRM "Product Description" can be tricky if you don't know how it is worded. In SAP, the product description is referenced as <u>Short text</u>. A familiarity with the contract's short text(s) can enhance your SRM searches.

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Close Release	Copy	Check 1	Renew	nt Preview Related Links A												24
Contract Numbe	er 4400013638	Smart Nu	imber xped	x LLC Contract Type S	W Regular Contra	act Status Rel	leased Supp	olier <u>424300 XP</u>	PEDX LL	<u>C</u> Contra	act Own	er <u>774369</u>	Pamela Ga	abriel		
Overview	Header	Items	Notes and At	tachments Conditions	Approval	Tracking										
General Header	Data															
Contrac	t Number: 44000	13638				Contract Owner	774369	Pame	ela Gabr	iel						
Smart	t Number: xpedx	LLC			Tar	rget Value/ Currency	6.000.00	0.00 USD								
	Smi	art Number is E	External			Release Value:	37.04	1.30 USD								
Contract De	escription: Janito	rial Supplies				Basic Contract										
	upplier; * 42430		DX LLC			busic contract										
Valid Fr	om / To: * 07/01/	2014 - 1	2/31/2014	1												
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			-													
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1 2 3 4	Normal Normal Normal Normal	34 35 36 37	Product ID 318440 318181 318213 318258	Description PWERD,BLCH CLR SF,202 LV BLEACH,LIQUID,GERMICIDAL S Cleaner, 1GAL STRIDE CITRUS CLEANER,144 oz pine	960Z S ALL PURPOSE OWDER	47130000 47130000 47130000 47130000	0.000 0.000 0.000 0.000		CAR CAR CAR CAR	6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00	26.00 U 10.26 U 21.02 U 23.22 U 66.90 U	JSD JSD JSD JSD JSD JSD	1 1 1 1 1	CAR CAR CAR CAR	Reference Item Number 0 0 0 0	Settings
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1 2 3 4 5 6	Normal Normal Normal Normal Normal Normal	34 35 36 37 38 39	Product ID 318440 318181 318213 318258 318261 318235	Description PWERD,BLCH CLR SF,202 LV BLEACH,LIQUD,GERMICDAL S Cleaner, 1GAL STRIDE CITRUS CLEANER,144 oz pine Cleaner, 270Z SPIC & SPAN P Disinfecant,130Z AEROSOL A	960Z S ALL PURPOSE OWDER AMPHYL DDRNT ERMICIDAL	47130000 47130000 47130000 47130000 47130000 47130000	0.000 0.000 0.000 0.000 0.000 0.000		CAR CAR CAR CAR CAR CAR	6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00	26.00 U 10.26 U 21.02 U 23.22 U 66.90 U 31.86 U 56.00 U	JSD JSD JSD JSD JSD JSD JSD JSD	1 1 1 1 1 1 1	CAR CAR CAR CAR CAR CAR CAR	Reference item Number 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Settings
1           2           3           4           5           6           7	Normal Normal Normal Normal Normal Normal Normal Normal	34 35 36 37 38 39 40	Product ID 318440 318181 318213 318258 318258 318261 318235 318268	Description PWERD,BLCH CLR SF,202 LV BLEACH,LIQUD,GERMICIDAL § Cleaner, 1GAL STRDE CTRUS CLEANER,144 oz pine Cleaner, 2702 SPIC & SPAN P Disinfecant, 1302 AEROSOL A Cleaner, 1GAL VIREX II 128 G8	960Z S ALL PURPOSE OWDER AMPHYL DDRNT ERMICIDAL eid bowl	47130000           47130000           47130000           47130000           47130000           47130000           47130000           47130000           47130000           47130000	0.000 0.000 0.000 0.000 0.000 0.000 0.000		CAR CAR CAR CAR CAR CAR CAR CAR	6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00 6,000,000.00	26.00 ( 10.26 ( 21.02 ( 23.22 ( 66.90 ( 31.86 ( 56.00 ( 19.33 (	JSD JSD JSD JSD JSD JSD JSD JSD	1 1 1 1 1 1 1 1 1	CAR CAR CAR CAR CAR CAR CAR CAR	Reference Item Number 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Settings

## **INSTRUCTIONS**

Now that we have learned the SAP contract line item <u>Material</u> numbers and the <u>Short text</u>, 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

Shop in	3 steps: Step 1 (Select G	Goods/Service)	
Previous	Next 🕨 Order Close		
l∳ Se	lect Goods/Service Shopping	2 3 g Cart (empty) Complete and Orde	
Find:		Go	
Browse:	Old Shopping Carts and Templates	CI WEBSITE - VIEW ONLY	COPA INTERNAL ECATALOG DGS - 1500
	Internal Goods/Services	MRO - ARBILL - SAFETY	MRO - Grainger, Gen Electric
		MRO - Schaedler - Electrical and Sylvania	a MRO - Wesco - Phillips
		Material/Service Contract Catalog(MSCC)	Peripherals & Networking Gear - POMEROY
		Peripherals & Networking Gear - ePlus	UniqueSource Products & Services
		VWR LAB SUPPLIES	
Free Text:	Describe what you need If you canno	ot find it above	

- 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

Add Internal	Goods/Servio	es		
Product ID:	318258	Ć	]	
Description:			-	
Internal Note:				
Quantity/Unit: Delivery Date:	08/11/2014	1.000		
			OK Can	cel //

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.

Add Internal	Goods/Services
Product ID: Description:	318258
Internal Note:	
Quantity/Unit:	1.000 EA
Delivery Date:	08/11/2014 🕝
	OK Cancel

- 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

Add Internal	Goods/Services
Product ID: Description:	318258
Internal Note:	Justification: Needed for disinfecting and cleaning of facilities.
Quantity/Unit:	6 EA
Delivery Date:	08/29/2014 🔄

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.

Previous Ne	ext 🕨   Order   Clos	se Save	Check												
/orkflow Prov	cess not defined														
und must be	entered for non-asset acc	count assignm	nent categories												
ine 1: No G/L	account was entered; en	iter a G/L acc	ount												
ine 1: Produc	t 318258 does not exist in	plant 1504 o	r it has been flagged for	deletion											
ine 1: Error in	account assignment for i	item 1													
501001	Goods/Service St	hopping Car		plete and Order											
tems in Sho	pping Cart														
Details Add	d Item Copy Paste D	Duplicate De												Filter Set	
Details Add	d Item Copy Paste C er Item Type	Product ID	Description	Product Category			nit Net Price / Li		у Оргал Туре	Per				Supplie	ie
Details Add Line Number	d Item Copy Paste D er Item Type Material			47130000	CLNG JANITR SUPPLIES	6.000	A (	.00 USD	у Орцоп Туре	Per 1	08/29/2014	1	Q		ie
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7. Refer to the quote for the price per unit and enter it in the **Net Price/Limit** field

1	tems in Shopp	ing Cart										
[	Details Add Ite	em Copy Paste D	uplicate De	elete								
Ē	Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Uni	Net Price / Limit	Currency	Option Type	Per
	• <u>1</u>	Material	318258	CLEANER,144 oz pine	47130000	CLNG JANITR SUPPLIES	6.000	EA	0.00	UFD		1
	•	Undefined Item Type			78121603	FREIGHT FEE	1.000		0.50	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		
	Account Assignment Notes and Attachments Delivery Address	Sources of Supply	Approval Process Overview
Identification		Currency, Values and Pricing	
Item Type:	Material	Order Quantity / Unit:	6.000 EA Each
Product ID:	318258	Ordered Quantity / Unit:	0.000
Description:	CLEANER,144 oz pine	Open Quantity / Unit:	6.000 EA
Product Category:	47130000 CLNG JANITR SUPPLIES	Price / Currency:	0.00 USD 🗇 Price Unit 1
Organization		Service and Delivery	
Purchasing Group:	DGS Central Purchase Purchasing Group   Show Members	Location / Plant:	301375 DGS Bureau of Procurement
Company Code:	COPA	Storage Location:	
Further Properties		Goods Recipient:	703389 Cynthia Anderson
Supplier Product Number:		Delivery Date:	08/29/2014
		Proceed Using P-CARD?:	

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

s for item 1 CLEANER,144 oz pin m Data Account Assignment Notes and Attachments Delivery Address Sources of Supply Approval Process Overview 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 Filter Setti Number Accounting Line Number Percentage Account Assignment Category Assign Number Account Assignment Description General Ledger Description Business Area 100.00 Cost Center

- 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

	rces of Supply sign Supplier	mpare Suppliers												Fi
_	Supplier Number	Supplier Name	Contract	item	Contract Item Description	Supplier Product Number	Net Price	Currency	Per	Unit	In Supplier List	Priority Rank	Priority Description	Interlinkage
	61327	STATE INDUSTRIAL PRODUCTS	4400012521	24	30% Non-core Discount		0.00	USD	1	EA	No	0		No
10	64055	ECOLAB INC	4400012531	21	30% Non-core Discount		0.00	USD	1	EA	No	0		No
16	64157	MCKESSON MEDICAL SURGICAL MINNESOTA	4400010245	14	Medical Supplies		0.00	USD	1	EA	No	0		No
4	24300	XPEDX LLC	4400013638	37	CLEANER,144 oz pine		7.74	USD	1	EA	No	0		No

- 11. After reviewing and/or completing all tabs, select Step 3 Complete and Order shopping cart
  - a. Name the shopping cart with the proper naming convention as shown below.
    - i. First 4 digits of the UNSPSC (product category)
    - ii. Space or dash
    - iii. Noun that describes the product or service
  - b. Write down the shopping cart number
  - c. Select DISPLAY/EDIT Agents to Ad Hoc any additional approvers (if applicable)
  - d. Select the CHECK button to Check the shopping cart
  - e. Select the SAVE button to save or ORDER button to process the shopping cart

Shop in 3 steps: Step 3 (Complete and Order)
Previous Next 🕨 Order Close Save Check
Image: Select Goods/Service     Shopping Cart (1 item)     Complete and Order
Name of shopping cart:       4713 Janitorial Supplies         Number:       11716378         Approval Process:       Display / Edit Agents         Note to Approver

End.