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.
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

   ![Add Internal Goods/Services](image1)

   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](image2)

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](image3)
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.

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

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.
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
   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

End.