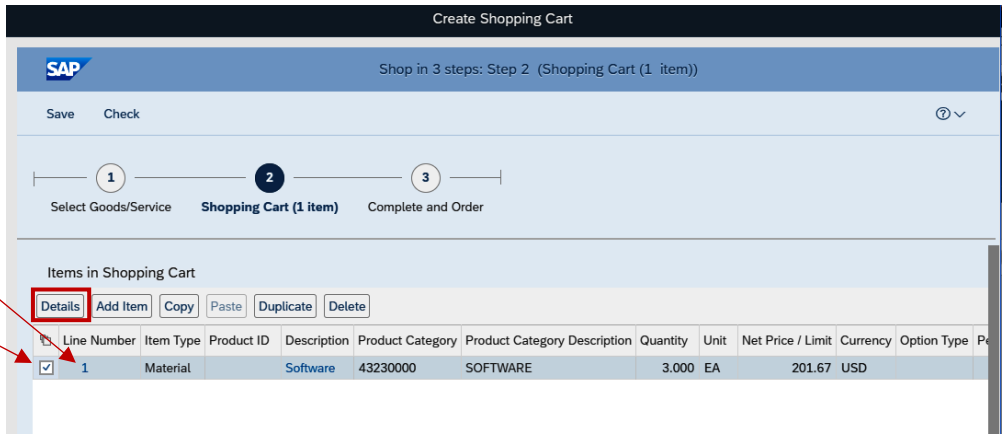
Using the Filter Option to Add a Source of Supply

Use this procedure when there is a need to **add** a Source of Supply (supplier referenced in Agency or Statewide contract) for each line item in the shopping cart.

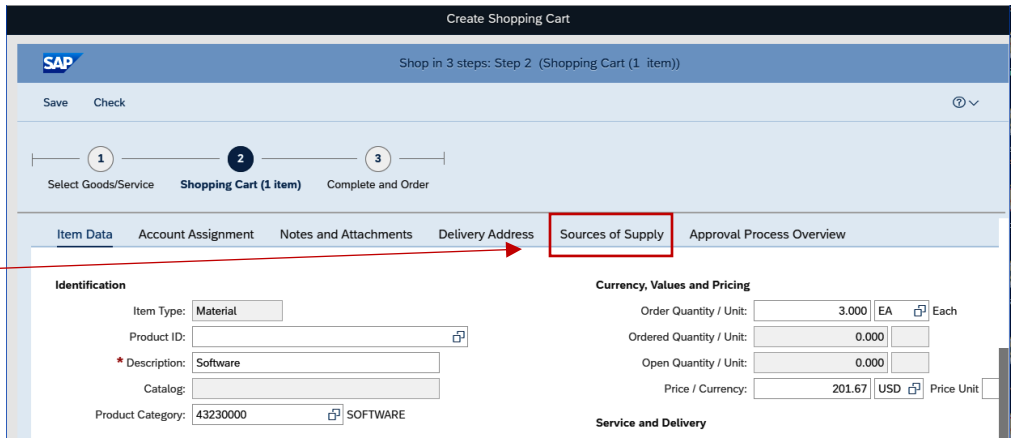
Upon entering the material or service item(s) into the cart, you can either:

1. Select the **hyper-linked Line-Item** number, **or**
   a. Select the **checkbox** next to the line-item number and select the **DETAILS** button.



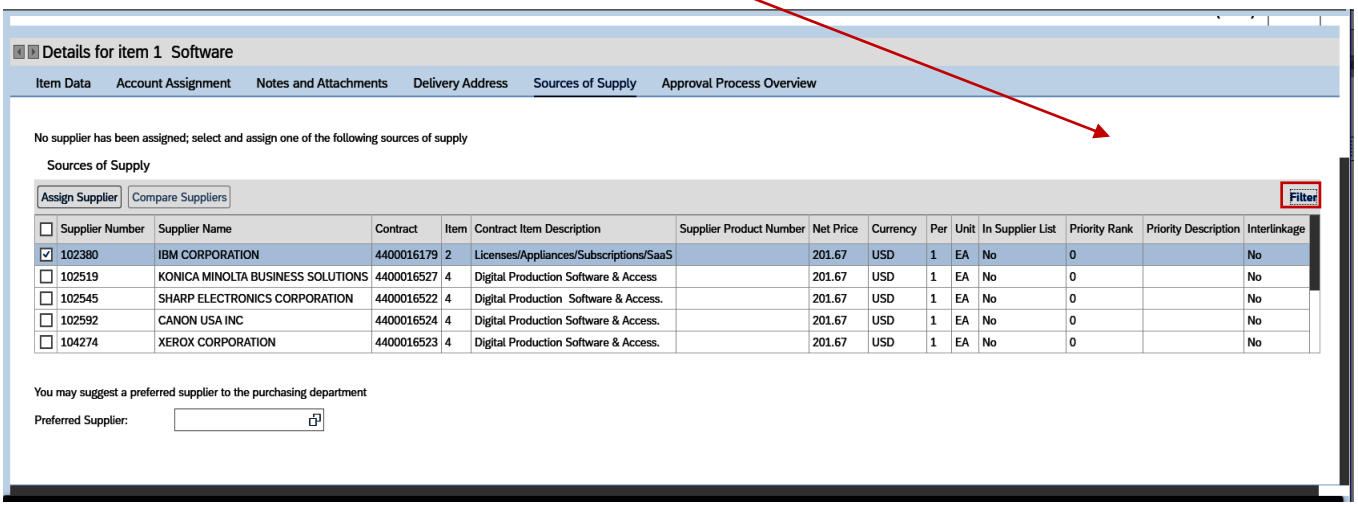
Notice, the Line-item details open to **Item Data** tab.

2. Select the **Source of Supply** tab



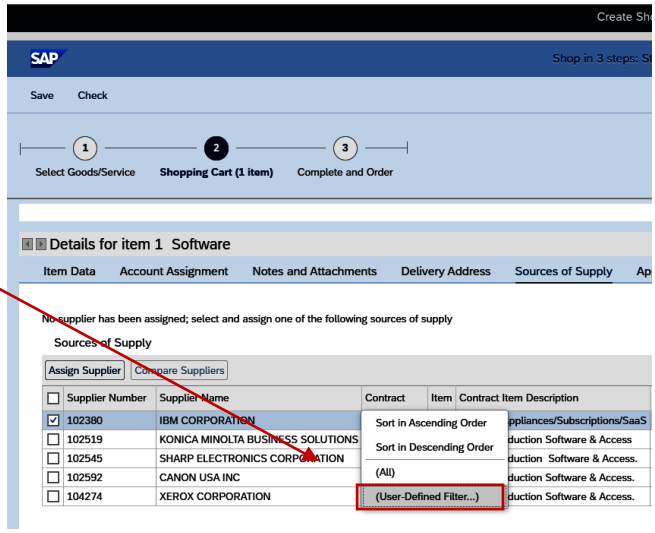
3. Shown here is a full screenshot of the **Source of Supply** tab.

a. Scroll to the far right of the screen and select the **Filter** option. Upon selection of the filter icon, it may appear as nothing has happened. Follow steps **4.** and **a.** to have the option for the ***'User-Defined Filter'*** available.

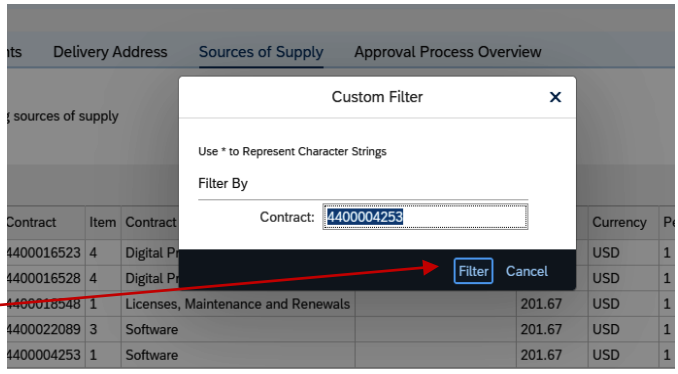


4. Select the column you want to filter by (**example:** ***Contract*** column)

a. Select the (User-Defined Filter…)

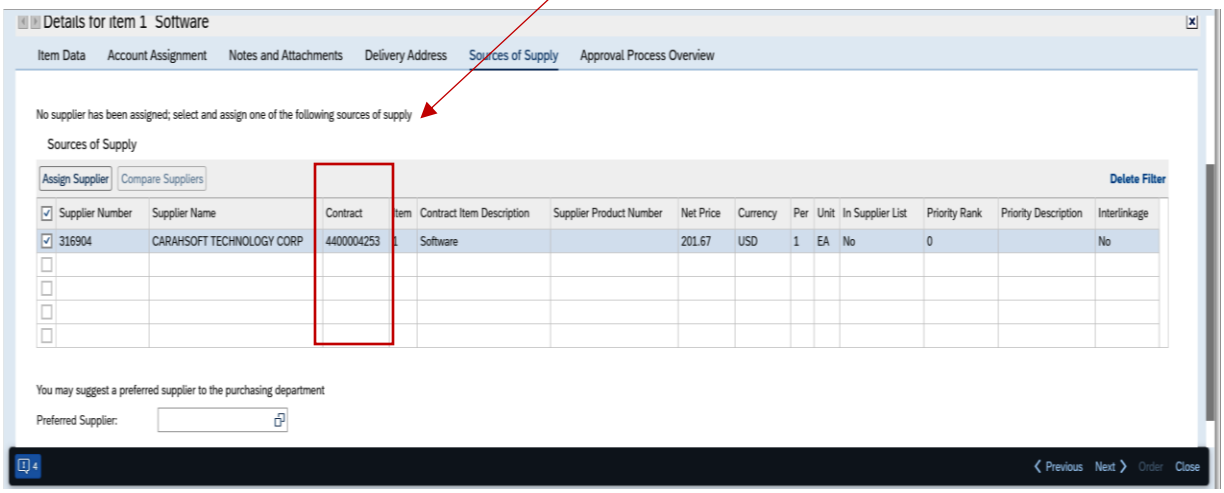


5. Enter the criteria (example: contract no.) in the space provided and select the **FILTER** button.

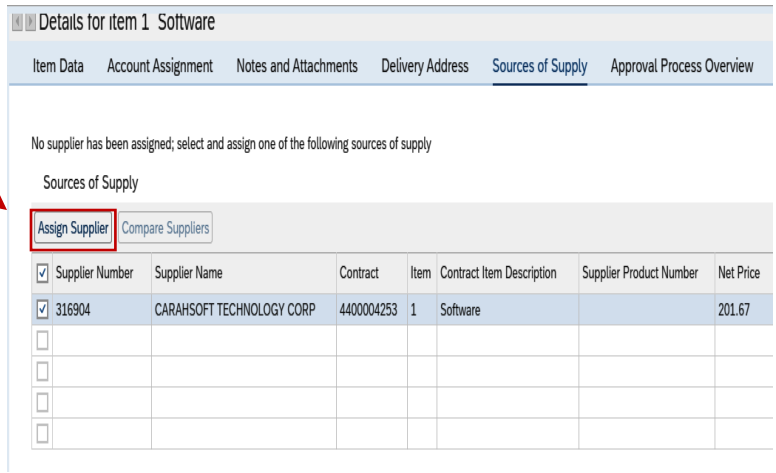


6. The information will display.

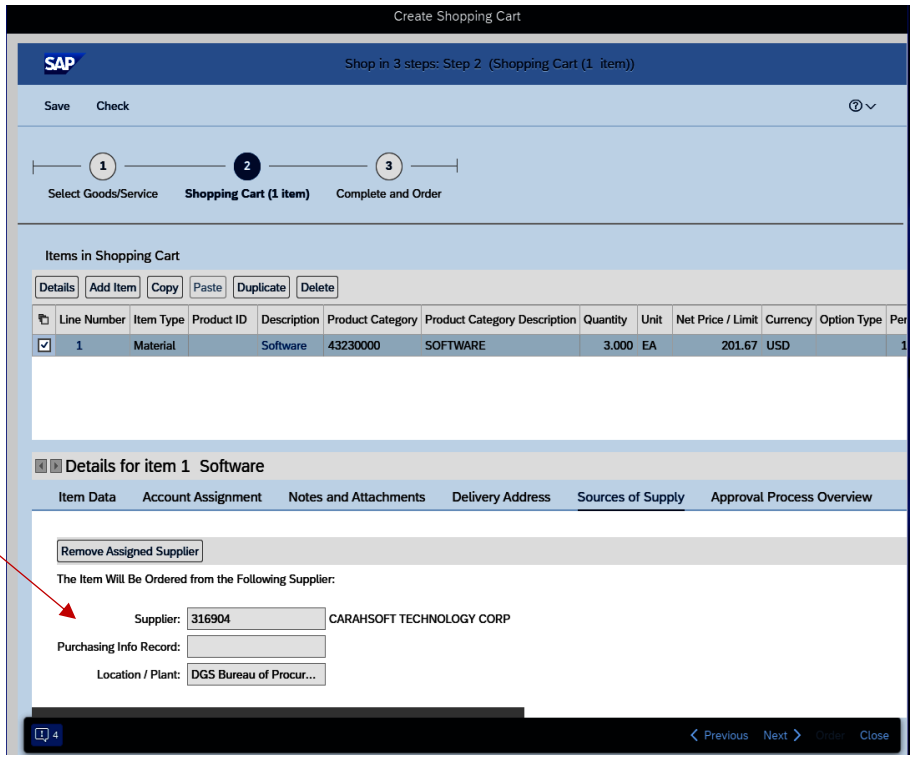
In the example, the Contract column was selected, and the contract number was entered into the filter by field. Once the filter button was selected, only that contract is displayed.



7. Select the line item of the contract and select the **ASSIGN SUPPLIER** button.



8. The Source of Supply (Assigned Supplier against the contract) displays.



NOTE: Repeat the steps to add the same Source of Supply (Supplier) for each line item in a Shopping Cart.