

iShopUTRGV Quick Reference Guide

How to - Add Items to a Cart

iShopUTRGV allows users to create multiple carts to separate orders. *Questions can be emailed to: ishop@utrgv.edu

1) Determine Cart Processing Method

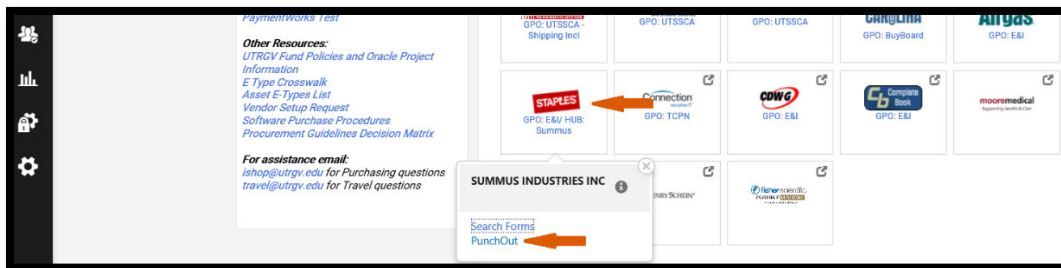
- Showcased Supplier – A showcased supplier or Punchout are vendors who have been awarded a contract by UTRGV or a Group Purchasing Organization (GPO). Are goods available from a Showcased Supplier?
- Showcased Form – Some items require special review and must be processed through a corresponding form. Ex: Orders over \$15,000, Business Contracts, Travel, Reimbursements, etc. Do goods or services need to be processed through a Showcased Form?
- Small Purchase Order – To be used if goods or services less than \$15,000 that are not available from a Showcased Supplier and do not require a Showcased Form.

2) Add items to Cart

Showcased Suppliers

PunchOut

- Click on Vendor Tile
- Click on Punchout



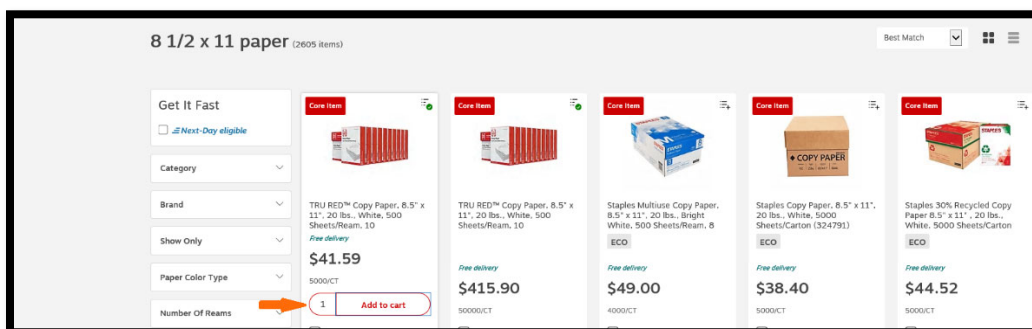
- Verify that you are tied to the Punchout Site



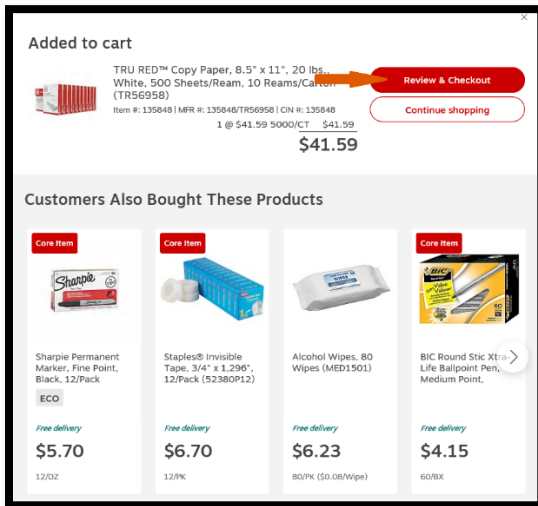
- Search for item(s)



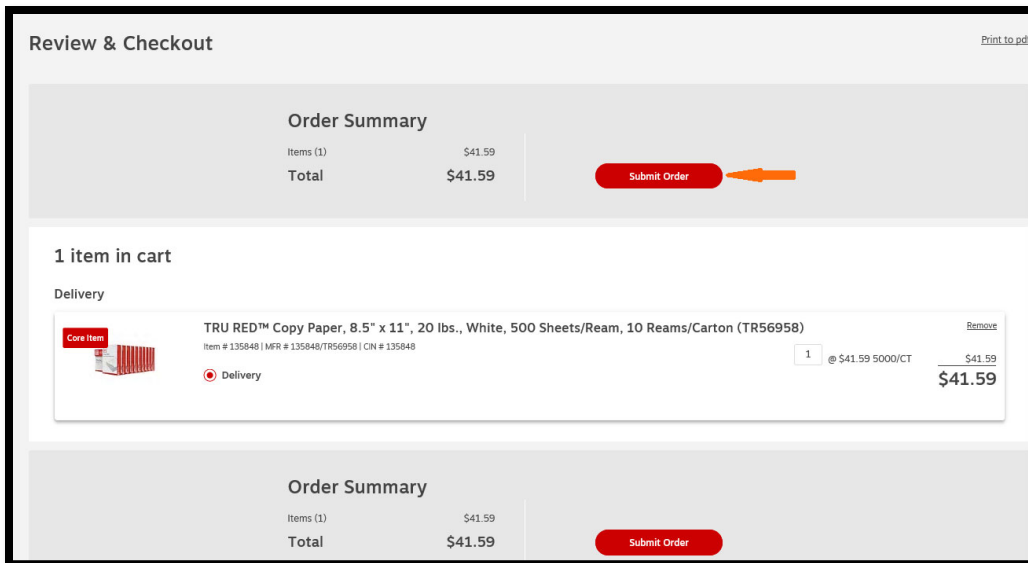
- Add item to Cart



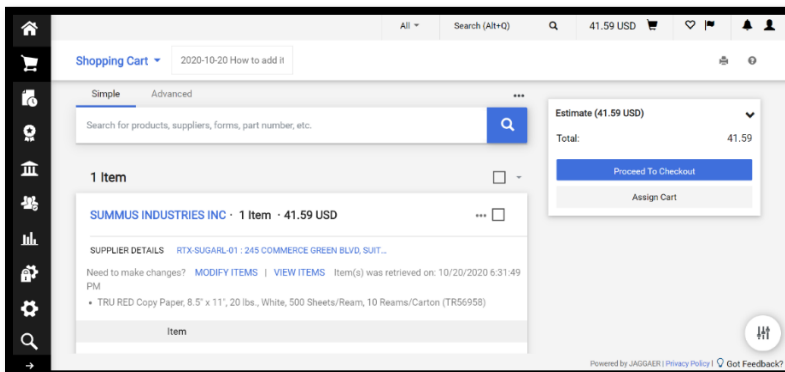
6. Add to Cart Pop-up screen (Review & Checkout or Continue Shopping Option) Click Review & Checkout



7. Review all item(s) and Submit Order



8. You will be returned to iShopUTRGV Cart.

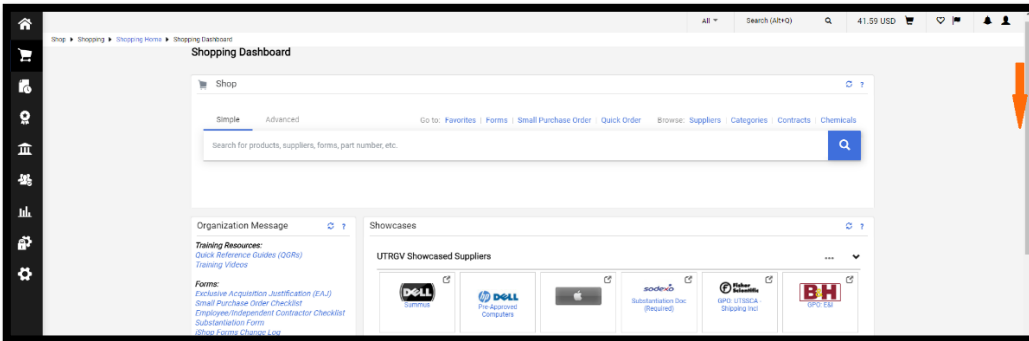


3) Showcased Forms

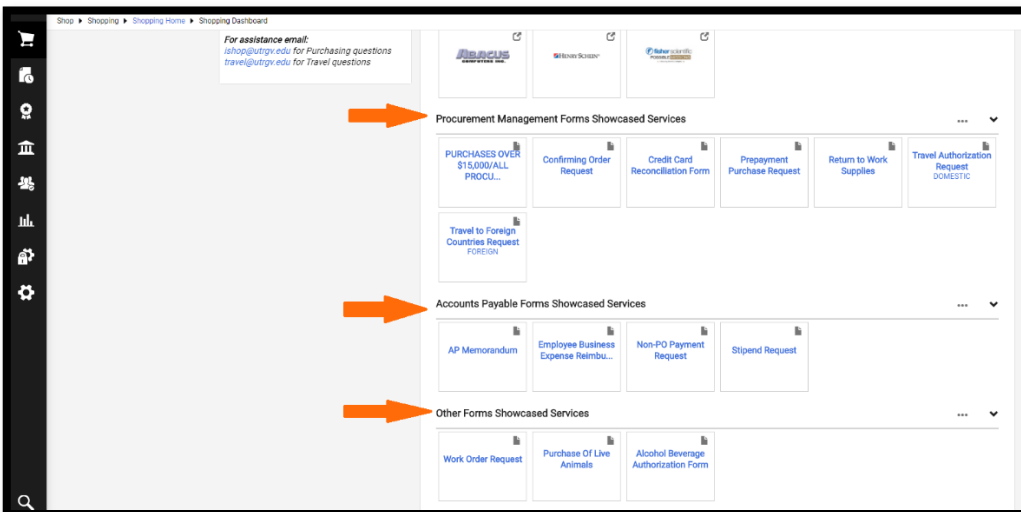
There are three types of showcased forms, Procurement Management, Accounts Payable, and Other. All forms are designed to gather the required information for the type of purchase being requested. The most common form used is the PO over \$15K/Procurement Contract Form. This Form is required for the following procurements:

- ALL orders over \$15,000
- ALL Procurement Contracts, regardless of dollar amount

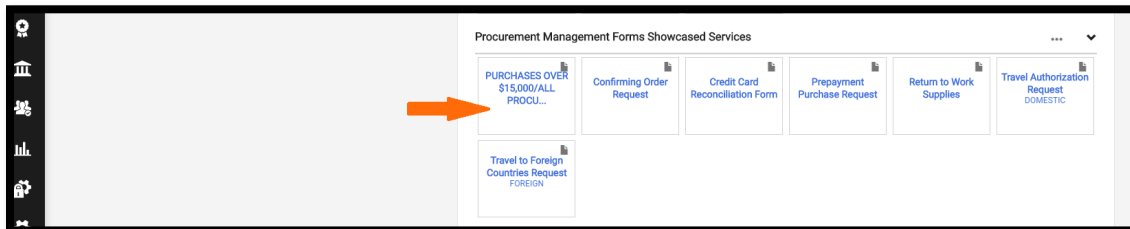
a) Scroll down on the iShop landing page.



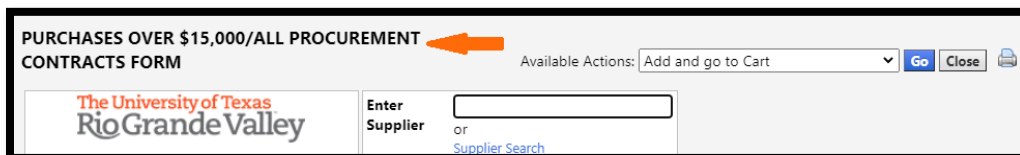
b) All showcased forms are separated into different sections, depending on the department responsible for the corresponding forms. Locate the **Procurement Management Forms Showcased Services** section



c) Click on the tile labeled **Purchases Over \$15,000/All Procurement Contracts Form**.



d) In the new Form window, Review the name of the form (**Purchases Over \$15,000/All Procurement Contracts Form**) in order to verify the correct form has been selected.



- e) Locate the **Enter Supplier** section and type in the supplier name or click on the Supplier Search link to find a specific supplier.

PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM

Available Actions: Add and go to Cart Go Close

The University of Texas Rio Grande Valley

PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM

Enter Supplier: Petes e

PETES ELECTRIC
Doing Business As: PEDRO A SILGUERO

NOTE: Clicking on the **Supplier Search** link will open a new window. If unsure of supplier name, type in a keyword into the search bar and click go. This will return a search for all of the suppliers that contain that keyword.

- f) Verify that the supplier name, address and distribution method are correct.

PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM

Available Actions: Add and go to Cart Go Close

The University of Texas Rio Grande Valley

PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM

Supplier: PETES ELECTRIC [more info...](#)
[select different supplier](#)

Fulfillment Address: RTX-SANBEN-01: (preferred)
28115 BEAN RD
SAN BENITO, TX 78586
US
[select different fulfillment center](#)

Distribution: The system will distribute purchase orders using the method(s) indicated below:
Check this box to customize order distribution information.

Email (HTML Attachment) Manual
peteselectricco@aol.com

- g) After selecting the supplier, Scroll down to locate the **Type of Purchase** section and select **Purchase Order over \$15,000**.

TYPE OF PURCHASE ?

Select Anticipated Purchase Type:

Business Contract

Purchase Order over \$15,000

- h) Below the Type of Purchase section, type in the **Catalog Number**, **Product Description**, **Quantity**, and **Unit Price** in the **Product Description** section.

PRODUCT DESCRIPTION ?

Enter contract type, part/catalog number on the Expense Type Field and the item description in the Product Description Field below.

Catalog No. [input field]

Product Description [input field]
254 characters remaining expand | clear

Quantity [input field]

Unit Price [input field]

Verify the Product Description information is correct then scroll down to **Procurement Method**.

- i) Select applicable Procurement Method:

PROCUREMENT METHOD ?

Select Procurement Method:

Proprietary - Attach Quote/Contract & EAJ Form

Bid (IFB, RFP, RFQ, RFI) - Purchasing will solicit request

Other - Attach Quote (May require additional documents upon review)

Note: Procurement Method will vary per requisition. When determining appropriate Procurement Method please refer to the following:

Proprietary – Goods/services are proprietary or only one supplier is capable of meeting the requirement. Attach quote and Exclusive Acquisition Justification (EAJ) Form

Bid – Procurement Office has/will bid this project. If this is a renewal - Reference Bid Number if previously awarded. If this is a new request, attach a quote or description to help develop Scope of Work

Other – Items are being purchased through a Group Purchasing Organization (GPO). List of Approved GPOs can be found at <https://www.utsystem.edu/offices/business-affairs/group-purchasing-organization-gpo-accreditation-program>. Attach quote referencing GPO. If items are not available through a GPO, you may also submit a minimum of three (3) quotes. Attach all quotes for review.

- j) Click on the **Available Actions** drop-down menu located at the top right-hand corner of the form. If you need to add more lines, select **Add to Cart** from the drop-down menu. If you are done adding lines, select **Add and go to Cart** Click on the **Go** button.

The screenshot shows a web form for 'PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM'. The form includes a logo for 'The University of Texas Rio Grande Valley' and a header with the same text. The main content area is divided into sections: 'Supplier' (PETES ELECTRIC), 'Fulfillment Address' (RTX-SANBEN-01), and 'Distribution'. An 'Available Actions' dropdown menu is open, showing options like 'Add and go to Cart', 'Add to Cart and Return', 'Add to Cart', 'Add to Draft Cart or Pending PR/PO', 'Add to PO Revision', 'Add to Favorites', 'Save', and 'Add to new Cart'. An orange arrow points to the 'Go' button in the top right corner of the form.

- k) You will receive a confirmation message stating (**Form added to cart Successfully**) at the top of the current Form. This indicates the line item has been added to your cart.

The screenshot shows a confirmation message at the top of the form: 'Form added to cart successfully'. Below the message, it says: 'Each Add to cart action adds the item to the cart. Use the Save option to update the item in the cart.' The form header and 'Available Actions' dropdown menu are visible below the message. The dropdown menu is now set to 'Add to Cart'. An orange arrow points to the 'Form added to cart successfully' message.

NOTE: When adding multiple line items, repeat steps (g-k) within the same form. Just remember to update the Product Description for each item added to your Cart.

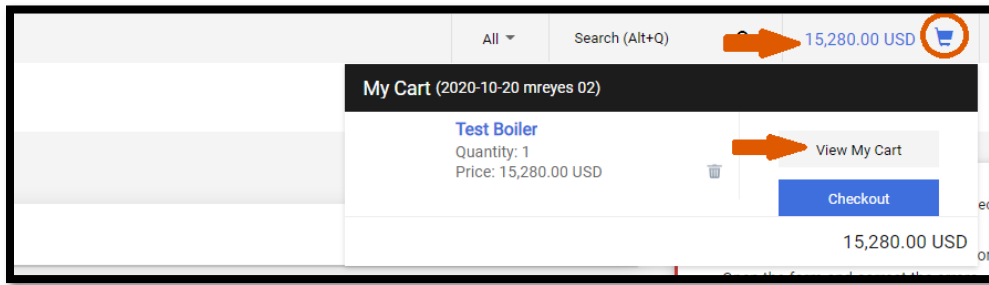
- l. When you have finished adding line items, click the **Close** button, located at the top right-hand corner of the form.

The screenshot shows the same confirmation message as in the previous screenshot. The 'Close' button in the top right corner of the form is highlighted with an orange arrow. The 'Available Actions' dropdown menu is set to 'Add to Cart'. The 'Form' and 'History' buttons are visible at the bottom left of the form.

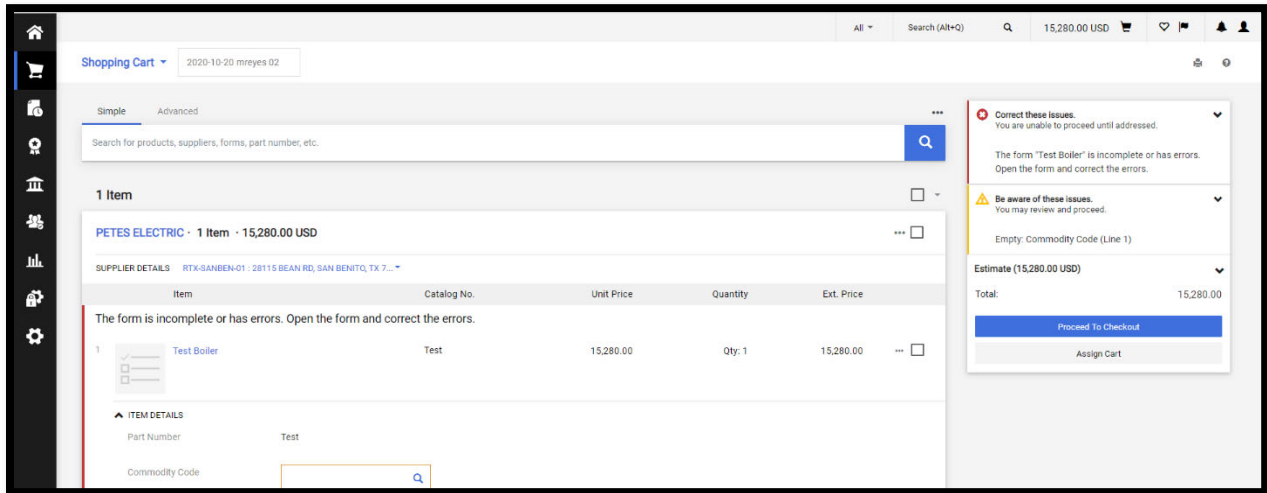
- m. Click on the **Shopping Cart** link located at the top of the screen next to the search bar.

The screenshot shows the top navigation bar of the system. It includes a home icon, a search bar with the text 'Search (Alt+Q)', a currency display showing '15,280.00 USD', and a shopping cart icon. The shopping cart icon is highlighted with an orange circle and an orange arrow.

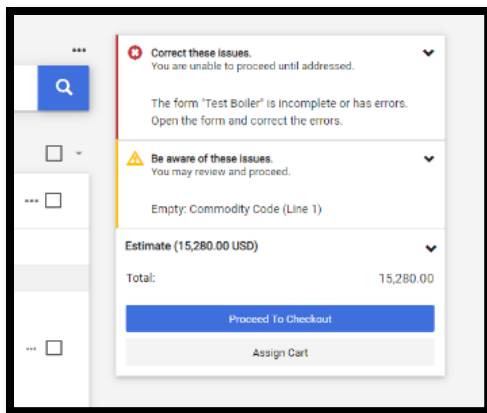
n. Click View My Cart.



o. You will be returned to iShopUTRGV Cart.



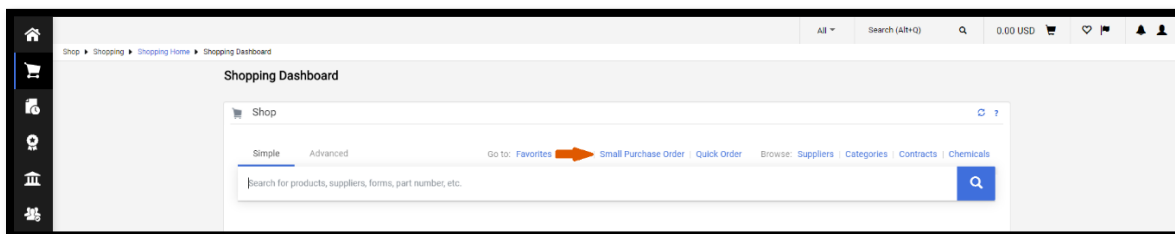
p. New Feature will assist you of any issues you might have with the cart



4) Small Purchase Order

Small Purchase Order Item Requests are processed when goods/services are not available from a Showcased Supplier and a Showcased Form is not required. All fields must be completed manually in order to process a request.

a) On the home page of iShopUTRGV, under the Search Bar, Click on **Small Purchase Order**



b) Small Purchase Order Item will display.

Note: The ★ Required fields are needed in order to complete the item .

c) Search for the Supplier and Select Supplier Name. If Supplier Name does not display, Supplier may not be set up. Please contact 956-665-2161 or email vendorrequest@utrgv.edu for assistance.

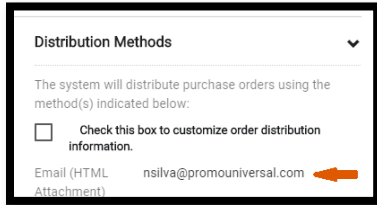
1. Select Existing Supplier

2. Search for vendor and Select

3. Confirm Supplier Selected is correct.

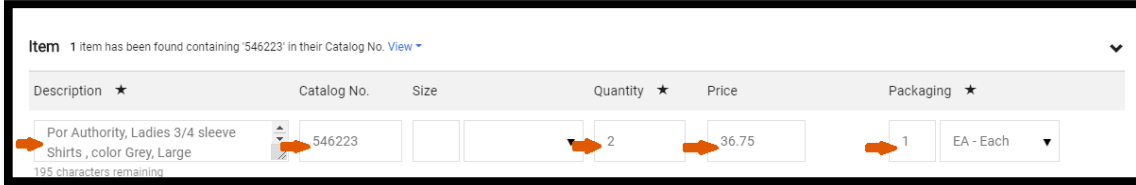
4. Select Correct vendor Address

5. Verify Distribution Email



*Note Distribution Method is indicate if PO will be sent to the supplier via fax or email. If method indicated is **Manual**, a fax or email is not on file for the supplier and you will need to send a copy to the vendor manually.*

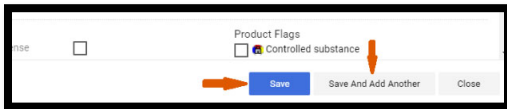
6. Complete **Product Description**, ensuring there is full detail, Catalog No, Quantity, Unit Price, and Packaging.



If a quote is provided, type all information exactly as listed on the quote. This will ensure that supplier fulfills the order with the correct items.

NOTE: Quote should provide shipping charges or indicate that shipping is included on all orders.

7. If additional lines need to be added, click "Save and Add Another." Once all lines have been added to the cart, "Save and Close."

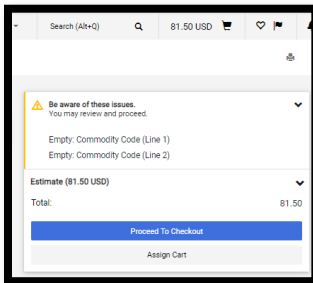


8. Click on the dollar value located at the top of the screen next to the search bar, followed by View My Cart.



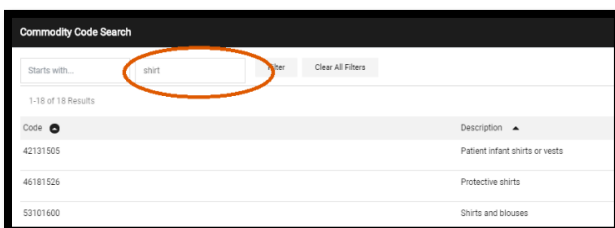
9. You will be returned to iShopUTRGV Cart.

10. Ishop will provide assistance on Pending Issues



11. Click on Search for Commodity Code

12. Utilize the Contains Search area for Commodity Code and Select the code that best fits the goods/services being purchased. Do not use 00000000 Missing Commodity.



13. Verify Items on Order

The screenshot shows a shopping cart interface with the following elements:

- Header: Shopping Cart, 2020-10-20 11:55:03, All, Search (2/4/2), \$1.50 USD, and user profile icons.
- Search bar: Search for products, suppliers, forms, part number, etc.
- Item list: 3 Items, PROMO UNIVERSAL - 3 Items - 81.50 USD.
- Supplier details: RTK-CORPUS-01 - 1728 SANTA FE, CORPUS CHRISTI, TX.
- Table with columns: Item, Catalog No., Unit Price, Quantity, Est. Price.
- Item 1: Por Authority, Ladies 3/4-sleeve Shirts, color Gray, Large. Catalog No. 546223, Unit Price 35.75, Quantity 2 1/EA, Est. Price 79.50. Commodity Code: 53101600 (Shirts and blouses).
- Item 2: Shipping Charge. Freight, 8.00, Quantity 1 1/EA, Est. Price 8.00. Commodity Code: 79121003 (Freight fee).
- Summary: Estimate (\$1.50 USD), Total: 81.50. Buttons: Proceed To Checkout, Assign Cart.
- Note box: Note: Once issues are addressed the issue notifications will change.