# 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

- a) 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?
- b) 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?
- c) 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

- 1. Click on Vendor Tile
- 2. Click on Punchout

4	Paymentworks Test Other Resources: UTRGV Fund Policies and Oracle Project	GPC: UTSSCA - Shipping Incl	GPO: UTSSCA	GPO: UTSSCA	GPO: BuyBoard	GPO: E&I
<b>чу</b> ПГ	Information E Type Crosswolk Asset E Types List Vendor Saturp Request Software Purchase Pot Procurement Guidelines Decision Matrix	STAPLES GPC: EAV HUB: Summus	GPO: TCPN	GPO: E&I	GPO: ERI	mooremedical Supporting leads for
<b>\$</b>	For assistance email: ishop@utry.edu for Purchasing questions travel@utrgy.edu for Travel questions	SUMMUS INDUSTRIES INC	NAN SORIAN			

3. Verify that you are tied to the Punchout Site

SelectSite PunchOut	Cancel Ponch

4. Search for item(s)

				_		_		_
Gummus Industries	Products $\sim$	8 1/2 x 11 paper	×	٩	***	8	0	¥ <sup>1</sup>
					Nev	v experien	ce - view g	guide
				_				

5. Add item to Cart

8 1/2 x	11 paper (2605 items)			B	est Match
Get It Fa □ <i>≡</i> Next-D	St Core Item	Core Rem To	Core Item E,	Core Item III.	Core Item
Category			1	COPY PAPER	
Brand	✓ TRU RED™ Copy Paper, 8.5' 11*, 20 lbs., White, 500 Sheets/Ream. 10	"x TRU RED™ Copy Paper. 8.5" x 11", 20 lbs., White, 500 Sheets/Ream. 10	Staples Multiuse Copy Paper. 8.5" x 11", 20 lbs., Bright White, 500 Sheets/Beam, 8	Staples Copy Paper. 8.5" x 11". 20 lbs., White, 5000 Sheets/Carton (324791)	Staples 30% Recycled Copy Paper 8.5" x 11", 20 lbs., White, 5000 Sheets/Carton
Show Only	Area delivery		ECO	ECO	ECO
Paper Color	Type 5000/CT	\$415.90	\$49.00	\$38.40	\$44.52
Number Of R	teams	50000/CT	4000/CT	5000/CT	5000/CT

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

Added to d	art			×
	TRU RED™ Co White, 500 Sł (TR56958) Item #:135848   №	py Paper, 8.5" x 1: leets/Ream, 10 Re IR #: 135848/TR56958 1 @ \$41.59 5	L", 20 lbs., ams/Calton CIN 4: 135848 D00/CT \$41.59 \$41.59	Review & Checkout Continue shopping
Customers	Also Boug	ht These Pro	oducts	
Core Item	Core	Item	A STATE	Care Item
Sharpie Permane Marker, Fine Poi Black, 12/Pack ECO	ent Stap nt, Tape 12/P	les® Invisible e, 3/4* x 1,296*, ack (52380P12)	Alcohol Wipes, 80 Wipes (MED1501)	BIC Round Stic Xtra-> Life Ballpoint Pen, Medium Point,
Free delivery	Free	telivery	Free delivery	Free delivery
\$5.70	\$6	.70	\$6.23	\$4.15
12/DZ	12/9		B0/PK (\$0.08/Wipe)	60/BX

7. Review all item(s) and Submit Order

Review & Checko	put	Print to pdf
	Order Summary       Items (1)     \$41.59       Total     \$41.59   Submit Order	
1 item in cart Delivery		
	TRU RED™ Copy Paper, 8.5" x 11", 20 lbs., White, 500 Sheets/Ream, 10 Reams/Carton (TR56958) htm # 135848 I MER # 135848/TR56958 I CN # 135848	/ct \$41.59 \$41.59
	Order Summary       Items (1)     \$41.59       Total     \$41.59       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.

â					All 👻	Search (Alt+Q)	۹	41.59 USD  🗑	♥ ⊨	41	-
	Shop + Shopping + Shopping Home + Shopping Dashboard										
H	Shopping Das	ooard									I
6	🎽 Shop						¢	?			
8	Simple	Advanced	Go to: Favorites   Forms   Sm	nall Purchase Order   Quick Order Brow	se: Suppliers   C	ategories   Contracts	Chemical				
Â	Search for pr	ucts, suppliers, forms, part	number, etc.				٩				I
쟶											I
ш	Organization M	ssage 📿 ?	Showcases				c	2			I
đ	Training Resource Quick Reference G Training Victors	tes (QGRs)	UTRGV Showcased Suppliers					v			1
<b>¢</b>	Former Exclusive Acquisit Small Purchase D Drajkogreet/ridegen Substaniation For Sibos Forms Chan	) Justification (EAJ) 9 Checklist 11 Contractor Checklist 1 Log	C Dell Summs C Dell Pre-Approved Computers	C soderåo Bubstantiation (Regulad)	ී මං Ship	C UTSSCA - aing Incl	POT EN				

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

	Shop      Shopping      Shopping Home      Shopping Dashboard						
	For assistance email: ishop@utrgv.edu for Purchasing questions travel@utrgv.edu for Travel questions	C Abacus	SHENR SOUN				
õ		Procurement Manag	ement Forms Showc	ased Services			🗸
血		PURCHASES OVER \$15,000/ALL	Confirming Order Request	Credit Card Reconciliation Form	Prepayment Purchase Request	Return to Work Supplies	Travel Authorization Request
		PROCU					DOMESTIC
ш		Travel to Foreign Countries Request					
<b>P</b>		FOREIGN					
8		Accounts Payable Fo	orms Showcased Ser	vices			~
		AP Memorandum	Employee Business Expense Reimbu	Non-PO Payment Request	Stipend Request		
		Other Forms Showca	ased Services				🗸
		Work Order Request	Purchase Of Live Animals	Alcohol Beverage Authorization Form			
q							

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

8	Procurement Manage	ment Forms Showc	ased Services			🗸
血 地 ————————————————————————————————————	PURCHASES OVER \$15,000/ALL PROCU	Confirming Order Request	Credit Card Reconciliation Form	Prepayment Purchase Request	Return to Work Supplies	Travel Authorization Request DOMESTIC
սև Թ	Travel to Foreign Countries Request FOREIGN					

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

PURCHASES OVER \$15,000/ALL PROCU CONTRACTS FORM	REMENT 🚄	Available Actions: Add and go to Cart 🗸 Go Close
The University of Texas	Enter	or
Rio Grande Valley	Supplier	Supplier Search

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 PROCUP CONTRACTS FORM	REMENT	Available Actions: Add and go to Cart 🔹 Go Close 🖨
The University of Texas Rio Grande Valley	Enter Supplier	Petes e PETES ELECTRIC
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM		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 PROCUR CONTRACTS FORM	EMENT	Available Actions: Add and go to Cart 🗸 Go Close
The University of Texas Rio Grande Valley	Supplier	PETES ELECTRIC more info select different supplier
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM	Fulfillment Address	RTX-SANBEN-01: (preferred) 28115 BEAN RD SAN BENITO, TX 78586 US select different fulfillment center
	Distribution	
	The system will distril method(s) indicated b	bute purchase orders using the below:
	Check this box to c information.	ustomize order distribution
	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.



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.								
Product Description								
	254 characters remaining expand   clear							
Quantity								
Unit Price								

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

i) Select applicable Procurement Method:

PROCUREMENT METHOD										
Select Procurement Method:										
•	<ul> <li>Proprietary - Attach Quote/Contract &amp; EAJ Form</li> <li>Bid (IFB, RFP, RFQ, RFI) - Purchasing will solicit request</li> <li>Other - Attach Quote (May require additional documents upon review)</li> </ul>									

*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 <u>https://www.utsystem.edu/offices/business-affairs/group-purchasing-organization-gpo-accreditation-program</u>. 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.

PURCHASES OVER \$15,000/ALL PROCUREMENT										
CONTRACTS FORM	Add and go to Cart 🗸 Go									
The University of Texas Rio Grande Valley	Supplier	PETES ELECTRIC mo info select different supplie	Add and go to Cart Add to Cart and Return Add to Cart Add to Draft Cart or Pending PR/PO							
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM	Fulfillment Address	RTX-SANBEN-01: (preferred) 28115 BEAN RD SAN BENITO, TX 785 US select different fulfillme center	Add to PO Revision Add to Favorites Save Add to new Cart							
	Distribution									
	The system will distr method(s) indicated	ibute purchase orders usin below:	ng the							
	Check this box to information.	customize order distribu	ution							
	Email (HTML	peteselectricco@aol.	.com							

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.

Form added to cart successfully Each Add to cart action adds the item to the cart. Use the Save option to update the item in the cart.							
PURCHASES OVER \$15,000/ALL PROCUREMENT							
CONTRACTS FORM	Available Actions: Add to Cart	✓ Go Close 🚍					

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.

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

Form added to cart successfully Each Add to cart action adds the item to the cart. Use the Save option to update the item in the cart.								
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM	Available Actions: Add to Cart 🗸 🔽 Go Close							
Form History								

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



#### n. Click View My Cart.

	All 👻	Search (Alt+Q)		15,280.00 USD	
My Cart (	2020-10-20 mre	yes 02)			
	Test Boiler Quantity: 1		<b>_</b>	View My Cart	
	11100. 10,200			Checkout	ec
				15,280.00 U	JSD <sub>or</sub>

## o. You will be returned to iShopUTRGV Cart.

â					All *	Search (Alt+Q	۹	15,280.00 USD 📜	♥ ►	* 1
'n	Shopping Cart   2020-10-20 mreyes 02								۵	0
	Simple Advanced Search for products, suppliers, forms, part number, etc.	Correct these issues.     You are unable to proceed until addressed.     The form 'Test Boller' is incomplete or has erro     Open the form and correct the errors.								
ж Ш	1 Item PETES ELECTRIC · 1 Item · 15,280.00 USD		Be aware You may Empty: 1		*					
հր	SUPPLIER DETAILS RTX-SANBEN-01 : 28115 BEAN RD, SAN BENIT	D, TX 7*					Estimate (15		~	
<u>a</u> ?	Item	Catalog No.	Unit Price	Quantity	Ext. Price		Total:		15,28	0.00
•	The form is incomplete or has errors. Open the form and correct the errors.           1							Proceed To Checkout Assign Cart		
	ITEM DETAILS     Part Number Test     Commodity Code	٩								

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

â									All 👻	Search (Alt+Q)	٩	0.00 USD	۳	• •	<b>A 1</b>
E	Shop > Shopping > Shopping Home > Shopp	Shopping Dashboard	shboard												
6		🐂 Shop										3 2			
ö		Simple	Advanced		Go to: Favorites	Small Purchase O	der   Quick Order	Browse: S	uppliers   C	ategories   Contra	cts   Chemic	als			
血		Search for pr	roducts, suppliers, forms	s, part number, etc.							C				
봚															

b) Small Purchase Order Item will display.

Add Non-Catalog Item				x
Supplier: Existing Supplier Select Supplier	▼ * <b>←</b>			~
Item				~
Description *	Catalog No.	Size	Quantity \star <table-cell-rows> Price</table-cell-rows>	Packaging \star <del>年</del>
254 characters remaining	4		•	EA - Each 🔻
Additional Details				*
Taxable		Capital Expense		Product Flags G Controlled substance Recycled
Commodity Code	Q	Manufacturer Name		← Hazardous material
Manufacturer Part No		UNSPSC		CON .
★ Required fields				Save And Add Another Close

Note: The  $\star$  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 <u>vendorrequest@utrgv.edu</u> 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

Distribution Methods 🗸								
The system will distribute purchase orders using the method(s) indicated below:								
Check this box to customize order distribution     information.								
Email (HTML Attachment)	nsilva@promouniversal.com							

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.

Item 1 item has been found containing '54	46223' in their Catalog No. V	/iew 🔻			*
Description ★	Catalog No.	Size	Quantity \star Price	Packaging ★	
Por Authority, Ladies 3/4 sleeve Shirts , color Grey, Large	546223		2 36.75	1 EA - Each 🔻	

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.

ŝ			Al -	Search (Alt+Q)	٩	81.50.USD		- +	3
	Shopping Cart * 2020-10-20 mreyes 03	My Cart (2020-10	0-20 mreyes (	(3)					
10	Simple Advanced	Shipp Quart Price:	ping Charge tity: 1 : 8.00 USD	Ŧ	v	lew My Cart	-		
8	Search for products, suppliers, forms, part sumber, etc.	Por Authority, Ledies 3/4 sleeve S Quantity: 2 Price: 73.50 USD			Checkout				
血	3 Items								
소	PROMO UNIVERSAL - 3 Items - 81.50 USD	🗆	Т	otal:				81.50	

9. You will be returned to iShopUTRGV Cart.

10. Ishop will provide assistance on Pending Issues

Sei	rch (Alt+Q)	۹	81.50 USD 📜	♥ №	4			
					۵			
A Be aware of these issues. You may review and proceed.					~			
Em	pty: Commodil							
Em	pty: Commodif	y Code (Line	e 2)					
Estimate	(81.50 USD)				~			
Total:				8	81.50			
		Proceed	To Checkout					
Assign Cart								

11. Click on Search Empty

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.

Commodity Code Search	
Starts with Shirt Clear All Filters	
1-18 of 18 Results	
Code 🖸	Description 🔺
42131505	Patient infant shirts or vests
46181526	Protective shirts
\$3101600	Shirts and blouses

# 13. Verify Items on Order

ĉ						All *	Search (Afr+Q) Q	81.50 USD 👿 🤇		<b>1</b>	
1	Shopping Cart * 2020-10-20 mreyes 03								•	0	
6	Simple Advanced						Estimate (81.50 USD)		~		
8	Search for products, suppliers, forms, part number, etc.					٩	Total:		81.50		
血	3 Items							Proceed To Checkout Assign Cart			
46	PROMO UNIVERSAL · 3 Items · 81.50 USD					🗆					
հե	SUPPLIER DETAILS RTX-CORPUS-01 : 1728 SANTA FE, CORPUS CHRISTI, *										
đ٢	item	Catalog No.	Unit Price	Quantity	Ext. Price		Note	e: Once			
۵	Por Authority, Ladies 3/4 sleeve Shirts , color Grey, Large	546223	36.75	2 1/EA	73.50	- 🗆	issues are				
	TEM DETAILS Commostly Code S3101600 Bits and blower	۹					addre is	ssed the ssue	÷		
	2 Shipping Charge	Freight	8.00	1 1/EA	8.00	- 🗆	notif will o	ications change.			
	n TEM DETALS D Commodity Code 79321603 Parijis Ree	٩									