iShopUTRGV Quick Reference Guide

How to - Add Multiple Lines to a Requisition (Non-Catalogs and Showcased Forms)

iShopUTRGV allows to add multiple lines to a requisition. Multiple lines can be added on a **Small Purchase Order Request** or on any of the **Showcased Forms.** *Questions can be emailed to: <u>ishop@utrgv.edu</u>

Small Purchase Order (Non Catalogs)

1. Once you have created a new shopping cart click on the iShop home page and open the "Non Catalog item"

Shop • Shopping Dashboard	Logout
Shop	
Simple Advanced	Go to: Fevorites Forms Small Purchase Order (Non-Catalog item) Quick Order Browse: Suppliers Categories Contracts Chemicals
Search for products, suppliers, forms, part number, etc.	Q Q

2. Complete all requested information on the Small Purchase Order Item for your first expense (line) and click "Save And Add Another"

Add Non-Catalog It	em					×
Supplier: Existing S	Supplier 🔻	*				*
Select Supplier	Q					
Item						*
Description \star		Catalog No	. Size	Quantity ★ I	Price Packagin	g ★
		h		•		EA - Each 🔻
254 characters remaining						
Additional Details						*
Taxable			Capital Expense		Product Flags	e
			Ν		Recycled	
Commodity Code		Q	Manufacturer Name		🗌 🔶 Hazardous material	
					🗌 😵 Radioactive	
Manufacturer Part No			UNSPSC		CCN 🧑 ECCN	4
					🗌 💩 ITAR	
★ Required fields					Save Save A	And Add Another Close

3. You will see an overview at the top of the Small Purchase Order displaying the lines that have been added. The system will keep the supplier information but will clear the product description and all other fields. Complete the fields for the next product.

Add Non-Catalog Item				×	
Recently Added				~	*
Supplier Name	Product Description	Catalog No	Size – Packaging	Unit Price Quantity	
PROMO UNIVERSAL	Port Authority Ladies Performance Polos	L5655	1UNIT - 25/EA	20.00 USD 1	
Supplier: Existing Supplier	▼ ★			~	
PROMO UNIVERSAL Q	Fulfillment Addre	ess	>	Distribution Methods 🗸	Ľ
				The system will distribute purchase orders using the method(s) indicated below:	l
				Check this box to customize order distribution information.	1
	1			Email (HTML Attachment)	
Item				~	
Description ★	Catalog No. Size	Quant	ity ★ Price	Packaging ★	ł
		•		EA - Each 🔻	i.
254 characters remaining					

4. If more expenses (lines) are needed keep clicking "Save and Add Another". On your last item click on "Save" to go to your cart and submit requisition for approval

Add Non-Cat	alog Item					×
Recently Adde	ed					~
Supplier Name		Product Description		Catalog No	Size – Packaging	Unit Price Quantity
PROMO UNIVE	RSAL	Port Authority Ladies Per	formance Polos	L5655	1UNIT - 25/EA	20.00 USD 1
Supplier: D	xisting Supplier	• *				*
PROMO UNIV	ersal Q		Fulfillment Addr	ess	>	Distribution Methods 🗸
						The system will distribute purchase orders using the method(s) indicated below:
						Check this box to customize order distribution information.
						Email (HTML nsilva@promouniversal.com Attachment)
Item 2 items has Description ★	we been found contain	ing 'M56555' in their Catalog N Catalog No.	o. View *	Quantit	y * Price	♥ Packaging ★
Port Authorit Polos 217 characters ref	ty <u>Mens</u> Performan	M56555	1	v 1	25	1 EA - Each 🔻
★ Required fie	elds				-	Save And Add Another Close

5. You will received a notice indicating that all lines were successully added.

thop Shopping Shopping Home Shopping Dashboard	Success Item successfully added to cart	All -	S
Shopping Dashboard			

Showcased Forms

1. Once you have created a new shopping cart click on the iShop home page and open the applicable form

â				All 👻	Search (Alt+Q)	Q 0.00 US	id 📜 🛇 🔽
	hop Shopping Shopping Home Shopping Dashboard Quick Reference Guides (QGRs) Training Videos	UTRGV Showcased S	uppliers				🗸
ie O	Forms: Exclusive Acquisition Justification (EAJ) Small Purchase Order Checklist Employee/Independent Contractor Checklist Substantiation Form Ishop Forms Change Log *Ploase use the latest version of the forms	G Summus	Pre-Approved Computers	ď	Substantiation Doc (Required)	GPO: UTSSCA- Shipping Incl	GPO: EM
血 恐	Supplier Registration: PaymentWorks Test Other Resources: UTRGV Fund Policies and Oracle Project Information	GRAINGER GPO: UTSSCA- Shipping Incl	C WER Source GPO: UTSSCA	GPO: UTSSCA	CARQLINA GPO: BuyBoard	Airgas. GPO: E&I	GPO: UTSSCA / HUB: TBS
<mark>е</mark> р ПГ	E Type Crosswalk Asset F-Types List Vendor Setup Request Software Purchase Procedures Procurement Guidelines Decision Matrix For assistance email:	GPO: E8I/ HUB: Summus	Connection washer GPO: TCPN	GPO: E&I	GPO: E8	mooremedical Separaty weets 4 Care	A&W Office Supply
\$	ishop@utrgv.edu for Purchasing questions travel@utrgv.edu for Travel questions	C Abacus	GHENRYSCHEN*	C feber scientific			
		Procurement Me lage	ment Forms Showc	ased Services			🗸
		PURCHASES OVER \$15,000/ALL PROCU	Confirming Order Request	Credit Card Reconciliation Form	Prepayment Purchase Request	Return to Work Supplies	Travel Authorization Request DOMESTIC
		Travel to Foreign					

2. Complete all requested information for your first expense (line) and click "Add to Cart" and "Go" on the top right hand side

PURCHASES OVER \$15,000/ALL PROCUREME	NT CONTRACTS F	ORM Available Actions:	Add and go to Cart ✓	Go Close 🖨
The University of Texas Rio Grande Valley	Supplier	HEWLETT PACKARD ENTERPRISE CO_more select Concerne supplier	Add to Cart and Return Add to Cart Add to Cart Add to Draft Cart or Pending PR/PO	13
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM	Fulfillment Address	RCA- PALOAL-01: (preferred) 8000 FOOTHILLS BLVD ROSEVILLE, CA 95747 US	Add to PO Revision Add to Favorites Save Add to new Cart	
		select different fulfillment center		
	Distribution			
	The system will distribut method(s) indicated belo	e purchase orders using the ow:		
	Check this box to cust information.	comize order distribution		
	Email (HTML Attachment)			

3. The system will notify you that the Form was successfully added to your cart. All other lines on the form will reset to blank.

	Each Add to cart actior	Form added t adds the item to the c	o cart successfully art. Use the Save option to upo	late the item in the cart.	t	
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM Available Actions: Add to Cart						
The University Rio Granc	of Texas le Valley	Supplier	HEWLETT PACKARD ENTERPRISE CO more info select different supplier			
PURCHASES OVER \$15,000/ALL PROCUREMENT CONTRACTS FORM		Fulfillment Address	RCA- PALOAL-01: (preferred) 8000 FOOTHILLS BLVD ROSEVILLE, CA 95747 US select different fulfillment center			

4. Complete the required fields for your second expense (line) overwriting your previous entry and repeat Step 3 until all lines have been added.

Ayour request is over \$15,000 and is available	through a punch-out vendor, please process through the punchout Site	
Please contact Purchasing for questions at pur	ch@utrgv.edu OR 956-665-2161.	
	TYPE OF PURCHASE	?
Select Anticipated Purchase Type:		
	 Business Contract Purchase Order over \$15,000 	
	PRODUCT DESCRIPTION	?
Enter contract type, part/catalog number on th	e Expense Type Field and the item description in the Product Description Field below.	
Catalog No.	483568	
Product Description	HP Support and Maintenance	
	228 characters remaining expand clear	
Quantity		
Unit Price		
	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) 	
	ATTACHMENTS	?
Attach Signed Forms		
Please attach the required forms/documents as	s noted in the PROCUREMENT METHOD section.	

5. On your last expense click on "Add and go to Cart" and "Go" to return to your requisition and submit it for approval

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	Available Actions:	Add to Cart	♥ Go	Close					
The University of Texas Rio Grande Valley	Supplier	HEWLETT PACKARD ENTERPRISE CO more info select different supplier		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	RCA- PALOAL-01: (preferred) 8000 FOOTHILLS BLVD ROSEVILLE, CA 95747 US select different fulfillment center		Add to PO Revision Add to Favorites Save Add to new Cart					