



CLARK COUNTY SCHOOL DISTRICT

Innovative Teaching and Learning Unit

Technology & Information Systems Services Division

Employee Business Training Department

SAP Shopping Cart Quick Reference Guide

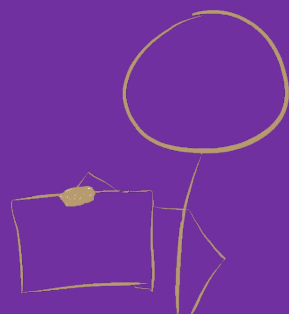


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Active Queries

Three active queries have been created for shoppers in the SAP system. They are:

- ALL** - Displays all of your shopping carts.
- SAVED** - Displays your saved shopping carts.
- AWAITING APPROVAL** - Displays your shopping carts waiting to be approved.

These queries will display only shopping carts that you have created.

Running Active Queries

1. Select the *Work* tab
2. Select *Shop*

The work window displays the Active Queries.

3. Select **"QUERY NAME"**

The query results are displayed below

4. Select **REFRESH**

The most current results are displayed.

The screenshot shows the SAP 'Active Queries' window. At the top, there are tabs for 'SHS Query (1)', 'All (82)', 'Saved (41)', and 'Awaiting Approval (32)'. Below this is a table of shopping carts. The table has the following columns: Shopping Cart Number, Shopping Cart Name, Status, Created On, and Created By. The data rows include various cart numbers and names, such as 'ZMITTOLL 06/06/2015 13:19' with a status of 'Release Rejected'. At the bottom right of the table, there is a 'REFRESH' button with a circular arrow icon, which is highlighted with a red circle and the number 4. The 'Last Refresh' timestamp is shown as 07/06/2015.

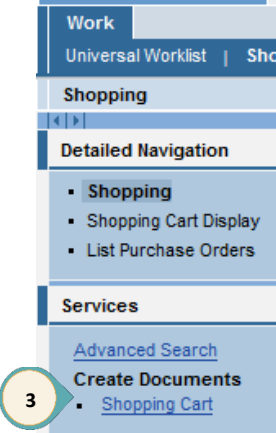
Shopping Cart Number	Shopping Cart Name	Status	Created On	Created By
2730326	ZMITTOLL 06/06/2015 13:19	Release Rejected	06/06/2015 13:30:59	ZMITTOLL
2730327	ZMITTOLL 06/06/2015 14:55	Approved	06/06/2015 15:00:24	
2730338	ZMITTOLL 06/08/2015 16:17	Awaiting Approval	06/08/2015 16:26:46	
2730339	ZMITTOLL 06/08/2015 19:14	Approved	06/08/2015 19:15:52	
2730357	STO used furn qty ck 06/09/2015 10:53	Saved	06/09/2015 10:58:08	
2730692	print preview test	Awaiting Approval	06/10/2015 10:55:00	
2730714	TR-69 4810 06/12/2015 10:21	Approved	06/12/2015 10:26:16	
2730730	TR-60 7228 06/11/2015 10:36		06/11/2015 10:39:07	
2730731	TR-61 4900 06/11/2015 10:55	Awaiting Approval	06/11/2015 11:06:16	
2730982	TR-62 3200 06/11/2015 12:39		06/11/2015 12:44:14	



IMPORTANT: The most current shopping cart query results will NOT be displayed unless you select the Refresh link.

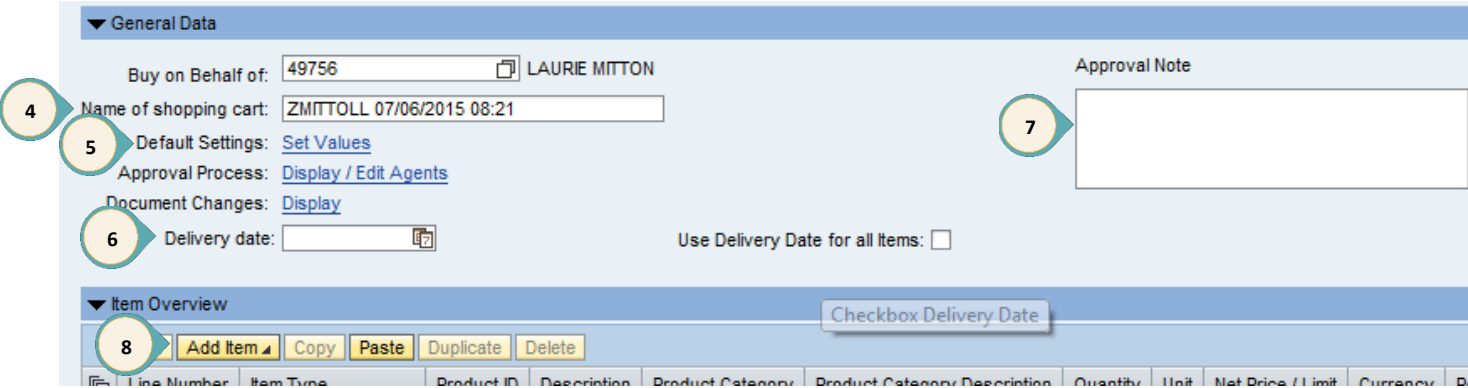
Create Shopping Cart

- 1. Select the *Work* tab
- 2. Select *Shop*
- 3. Select **SHOPPING CART** from *Detailed Navigation* > *Services*



The Create Shopping Cart window opens in a new tab.

- 4. Edit **NAME OF SHOPPING CART**
- 5. Change **DEFAULT SETTINGS** if necessary
(see Default Settings reference for details)
- 6. Enter **DELIVERY DATE** if necessary
- 7. Enter **APPROVAL NOTE** if necessary
- 8. Click **ADD ITEM**
- 9. Select desired catalog



Window refreshes to display SRM-MDM Product Catalog

10. Enter **KEYWORD** search criteria
11. Click **SEARCH**
12. Click **SELECT** box for desired item
13. Change **QUANTITY**
14. Click **ADD TO CART**
15. Click **RESET SEARCH**

Continue adding all items.

SRM-MDM Product Catalog

Search Search Criteria

Keyword: battery Search Reset Search

Type: Supplier Name: Supplier Part Number:
Item Type: Manufacturer Name: Manufacturer Part Number:

Found 133 item(s) of 19173 and showing 1 to 10

Products

List View

Add to Cart Cart Preview Image On Image Off Number of Items Per Page 10

Select	Quantity	Type	Image	Short Description	Manufactur
<input type="checkbox"/>	1			Apparatus Electrolysis w/o Battery Jar	Flinn Scient
<input type="checkbox"/>	1			Battery 1-1/2v Photo/Electronic A76	Energizer E
<input type="checkbox"/>	1			Battery 1.5 V Calculator-Type #357	Flinn Scient
<input checked="" type="checkbox"/>	1			Battery 3v Lithium Coin 2/pk	Energizer E
<input type="checkbox"/>	1			Battery 3V Lithium for Glucometers	Proctor & G

16. Click **CART PREVIEW**
- Review all item and quantities.
17. Click **TRANSFER ITEMS**

SRM-MDM Catalog

Cart Preview

Transfer Item(s) Delete Delete All Back to Search Result Recalculate

Select	Quantity	Item Type	Short Description	Type	Supplier Name	Price Information	Order UOM	Total Price
<input type="checkbox"/>	1		Battery 3v Lithium Coin 2/pk		Office Depot Inc	2.71 USD	PK	2.71 USD

Grand Total: 2.71 USD

18. Click **ORDER**

Create Shopping Cart

Order Print Preview Close Save Check

Number 2732801 Document Name ZMITTOLL 07/
Created By LAURIE MITTON

General Data

Advanced Search

The use of Advanced Search options allows you to narrow search results. To complete an Advanced search from the selected CCSD Catalog, By default numerous advanced search fields (as seen below) are included in the catalog search.

Keyword: [Advanced Search](#) [Classification / Product Group Description](#)

Type: Supplier Name: Supplier Part Number:

Item Type: Manufacturer Name: Manufacturer Part Number:

Field	Examples	Type of Data
Type	All, Null, or Standard	Easily locates Standard items, especially combined with another search.
Supplier Name	Office Depot, Brady	Vendor that we receive the product from.
Manufacturer Name	Avery, Califone, Dell	The company that makes the product.
Supplier Part Number	Catalog Number from Office Depot	The number assigned by the vendor
Manufacturer Part Number	5160 (Avery Labels)	The number assigned by the manufacturer

A “wildcard” may be used to find additional items if a search does not initially return enough items. It may also be used if you are unsure of the spelling of an item.

Type in Search Section	Result
disp*	display, disposable, dispenser, dispensing, etc.
b*ll	bell, ball, bull, bill, barbell, etc.
CCF*	Pulls up all CCF documents (searching in general catalog)
foam	“Soap Hand Foam 1.25l 3/cs”

Additional Shopping Cart Tools

After items in the holding area have been transferred to the SAP shopping cart, additional action buttons are available. They are:

- ⦿ Details: Detailed information about the specific item in question, such as Supplier, Part Number, etc.
- ⦿ Add Item: Add more items to the shopping cart
- ⦿ Copy: Copy items that exist in the shopping cart into a clipboard. Used most often during a free text order.
- ⦿ Paste: Paste the copied item from the clipboard, adding them to the list.
- ⦿ Duplicate: Make duplicates of selected items that exist in the shopping cart. (This is the same as doing a copy followed by a paste.)
- ⦿ Delete: Delete items in the shopping cart – items can only be deleted before the shopping cart has been approved.

Default Settings

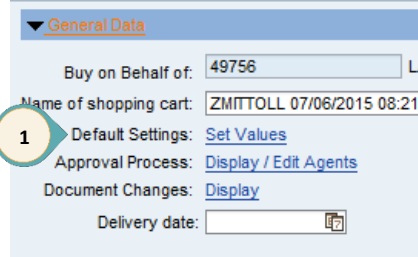
Default Settings are changed to:

- 📍 Code entire shopping carts to a different funding source
- 📍 Change the Storage Location (delivery location) for a particular shopping cart

From the General Data section of the Create Shopping Cart window:

1. Select **SET VALUES**

The Change Default Settings window is displayed.



Change Budget coding for entire shopping cart	Change Storage Location for entire shopping cart
2. Select <i>Account Assignment</i> Tab	2. Click <i>Storage Location</i> search button
3. Select <i>Account Assignment Category</i>	3. Select new location
4. Select <i>Assign Number</i>	4. Click OK
5. Click OK	

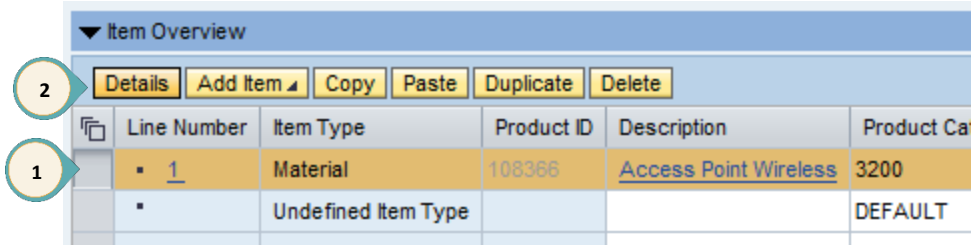
When changing the default budget coding, the following information may be helpful:

If charging to a	Then Change
Grant (must have grant information (702) 799-5224)	Cost Center dropdown to Order, enter the internal order number.
Special Revenue	Cost Center dropdown to Order, enter the internal order number.
Different Cost Center Group	Use the dropdown to choose a different Cost Center. This Cost Center must be attributed to a different Cost Center Group.

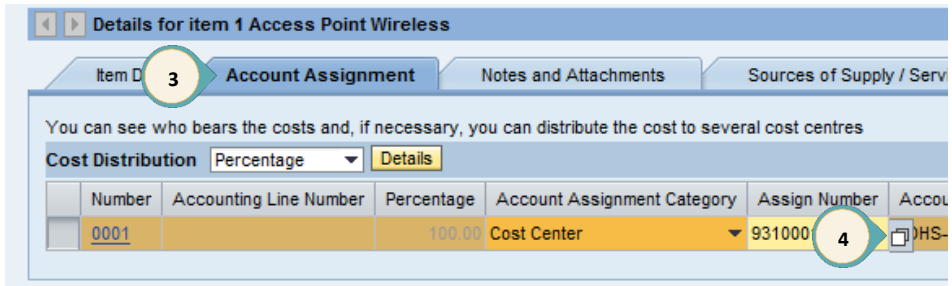
Change Single Line Item

It is also possible to change the budget coding or storage location for a single item in the shopping cart. After transferring items to the shopping cart, from the Item Overview section of the Create Shopping Cart window:

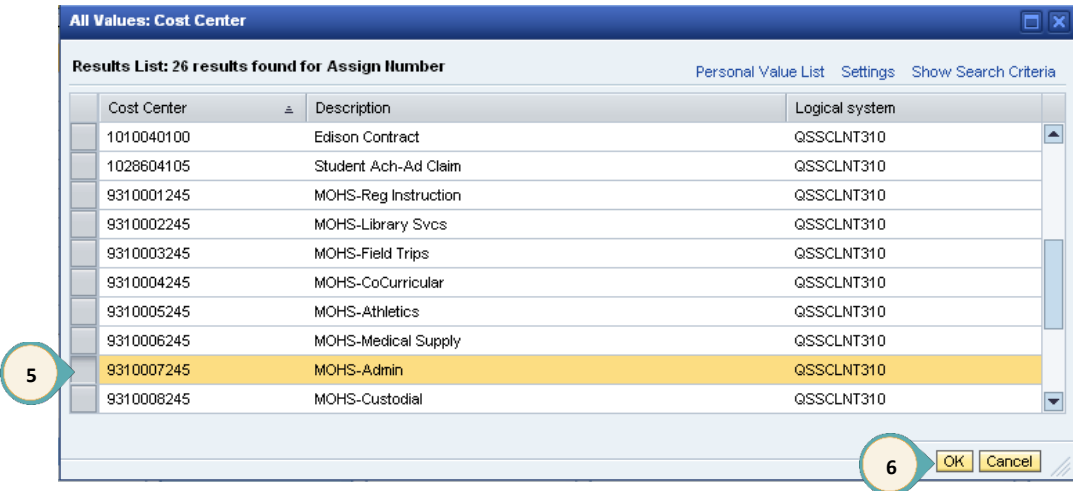
- 1. Select line
- 2. Click **DETAILS**



- 3. Select *Account Assignment* tab
- 4. Click **ASSIGN NUMBER** search button



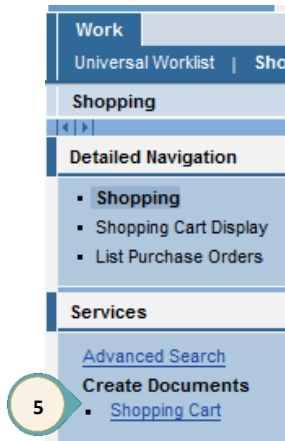
- 5. Select account
- 6. Click **OK**



Free Text Order

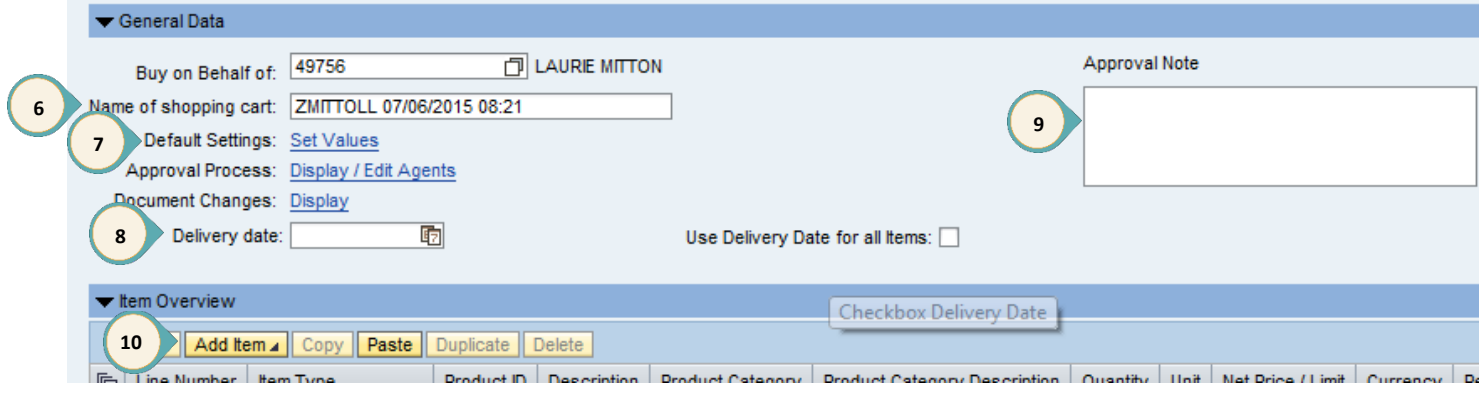
To create a free text order:

1. Contact the Purchasing Department to verify the desired items are not available in the catalog
2. Obtain quote for purchase of item
3. Select the *Work* tab
4. Select *Shop*
5. Select **SHOPPING CART** from *Detailed Navigation* > *Services*



The Create Shopping Cart window opens in a new tab.

6. Edit **NAME OF SHOPPING CART**
7. Change **DEFAULT SETTINGS** if necessary (see Default Settings reference for details)
8. Enter **DELIVERY DATE** if necessary
9. Enter **APPROVAL NOTE** if necessary
10. Click **ADD** Item
11. Select *Free Text*



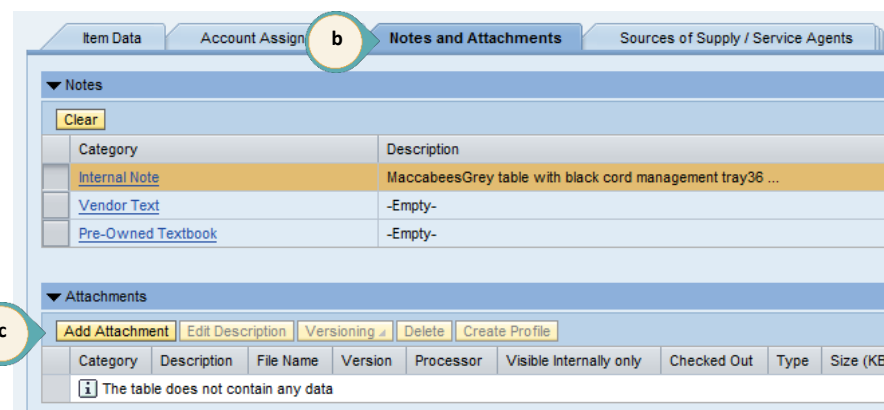
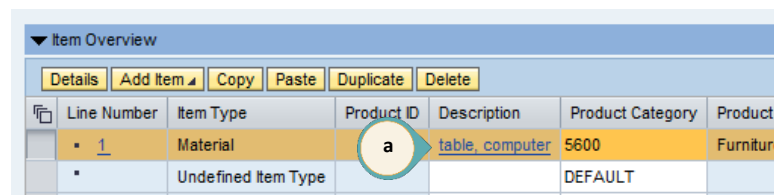
The Add Item with Free Description window is displayed. Complete the following fields:

Field	Description of Field
Description	Description of goods/services
Internal Note	<ul style="list-style-type: none"> ○ More detailed information of the goods/services Dollar amount not to exceed Timeframe/Duration (if for service) Example: Once per month for one year 07/01/2014 – 06/30/2015 ○ Required on date ○ Suggested supplier’s name, address, phone number (if available, but not necessary) ○ Quantity, if needed to further explain request ○ Complete description of goods/services ○ Dimensions, color, size, specifications, manufacturer name and number, etc. ○ Direct information for the buyer eyes only <ul style="list-style-type: none"> ○ Example: Do not order from XYZ Company, they were defective last time ○ G/L Account requesting if item is over \$5,000.000
Product Category	Identifies the buyer and the assigned G/L Account
Quantity	How many items are required
Unit of Measure	Each, Dozen, Pack, Set, Case, Lot, etc. (see Unit of Measure)
Net Price	Cost of individual item
Delivery Date	Suggested delivery date (see Delivery Date)

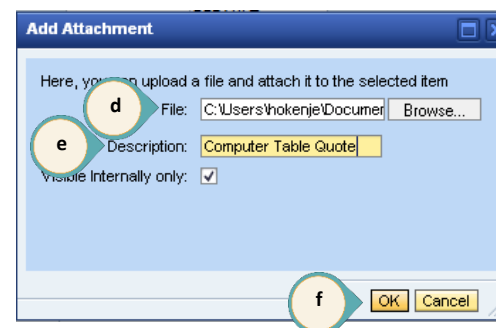
12. Click **ADD TO ITEM OVERVIEW**

13. Click **OK**

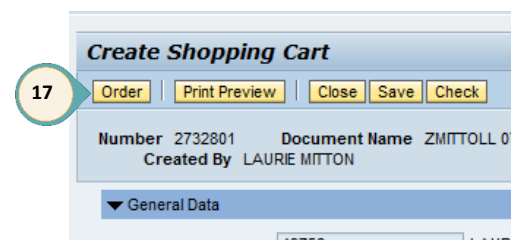
14. Attach Quote to order
 - a. Select item *Description*
 - b. Select *Notes and Attachments* tab
 - c. Click **ADD ATTACHMENT**



- d. Browse for Quote
- e. Enter **DESCRIPTION**
- f. Click **OK**



15. Continue adding line items to order
16. Add Shipping & Handling fee
17. Click **ORDER**



Saved Shopping Cart

To complete or edit a shopping cart:

1. Select **Work** tab
2. Select **Shop**

From the **Saved** Active Query results

3. Click **SHOPPING CART NUMBER**

The Display Shopping Cart window is displayed

4. Click **EDIT**
5. Complete the shopping cart

Active Queries

Shopping Carts [SHS Query \(1\)](#) [All \(83\)](#) [Saved \(45\)](#) [Awaiting Approval \(32\)](#)
 More Queries [Ad Hoc \(2\)](#) [Last 7 days \(64\)](#) [Today \(17\)](#) [SHS SC's \(263\)](#)

Shopping Carts - Saved

Show Quick Criteria Maintenance [Change Query](#) [Define](#)

View: * CCSD Standard View | Create Shopping Cart Copy | Display Edit Delete | Create Confirmation Print Preview Refresh Export

Shopping Cart Number	Shopping Cart Name	Status	Created
2732803	ZMITTOLL 07/06/2015 09:13	Saved	07/06/2015 09:13
3 2732802	ZMITTOLL 07/06/2015 08:47	Saved	07/06/2015 08:47
2732477	notes on other items 07/06/2015 08:23	Saved	07/06/2015 08:23
2732472	ZMITTOLL 07/02/2015 14:51	Saved	07/02/2015 14:51

4 **Display Shopping Cart**

[Edit](#) [Print Preview](#) [Close](#) [Refresh](#)

Number 2732802 Document Name ZMITTOLL
 Created By LAURIE MITTON

6. Click **ORDER**

6 **Create Shopping Cart**

[Order](#) [Print Preview](#) [Close](#) [Save](#) [Check](#)

Number 2732801 Document Name ZMITTOLL 07/06/2015 08:47
 Created By LAURIE MITTON

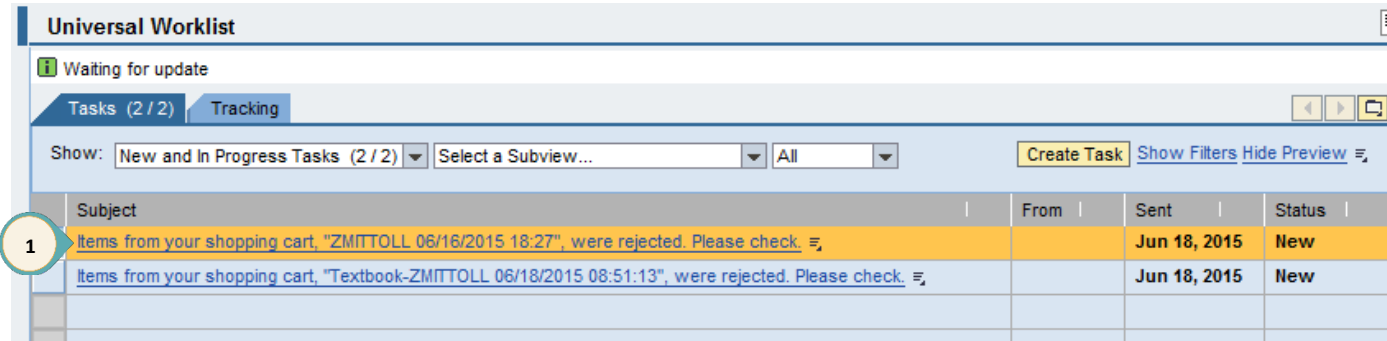
General Data

IMPORTANT: If the shopping cart Default Settings were changed (change in budget coding or delivery location) you MUST change the Default Setting AGAIN before adding more items to the shopping cart.

Accept Rejected Shopping Cart

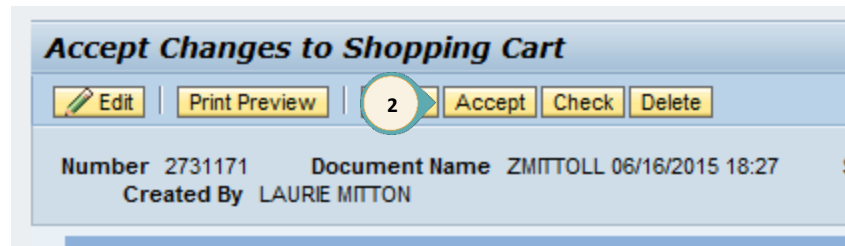
Any shopping cart that has been rejected must be “accepted” in order for budget funds to be released for further use. From the Universal Worklist:

1. Click the rejected shopping cart link in the Subject area



The Accept Changes to Shopping Cart window opens in a new browser tab.

2. Click **ACCEPT**



The Display Document window is displayed.

3. Click **CLOSE**

