**CLARK COUNTY SCHOOL DISTRICT**
BUSINESS AND FINANCE DIVISION
TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION
USER SUPPORT SERVICES
EMPLOYEE BUSINESS TRAINING DEPARTMENT

# SAP Shopping Carts:
## Quick Reference Guide

*Revised:* February 2025

**CCSD**
CLARK COUNTY
SCHOOL DISTRICT

# Contents

# SAP Shopping Carts: Quick Reference Guide

This guide provides detailed instructions for shoppers on how to order supplies through the SAP Portal.

## Active Queries

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

ALL - Displays all of the shopping carts created by the user.

SAVED - Displays the user's saved shopping carts.

AWAITING APPROVAL - Displays the user's shopping carts waiting to be approved.

These queries will display only shopping carts created by the user.

## Running Active Queries

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

   The work window displays the Active Queries.

   **Active Queries**

   Shopping Carts  All (1)  Saved (0)  Awaiting Approval (0)

3. Select the query type (All, Saved, or Awaiting Approval). The query results will be displayed.
4. Select the SHOPPING CART NUMBER to see details of the shopping cart.
5. Select REFRESH to ensure the most current results are displayed.
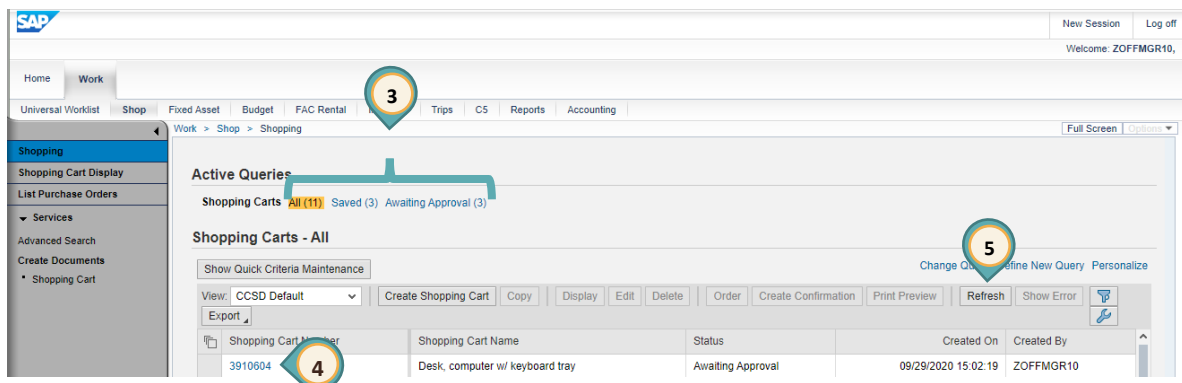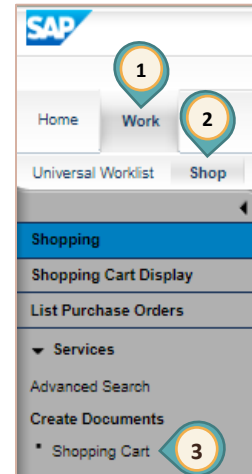
**IMPORTANT!**
The most current shopping cart query results will **NOT** be displayed unless the REFRESH link is selected.
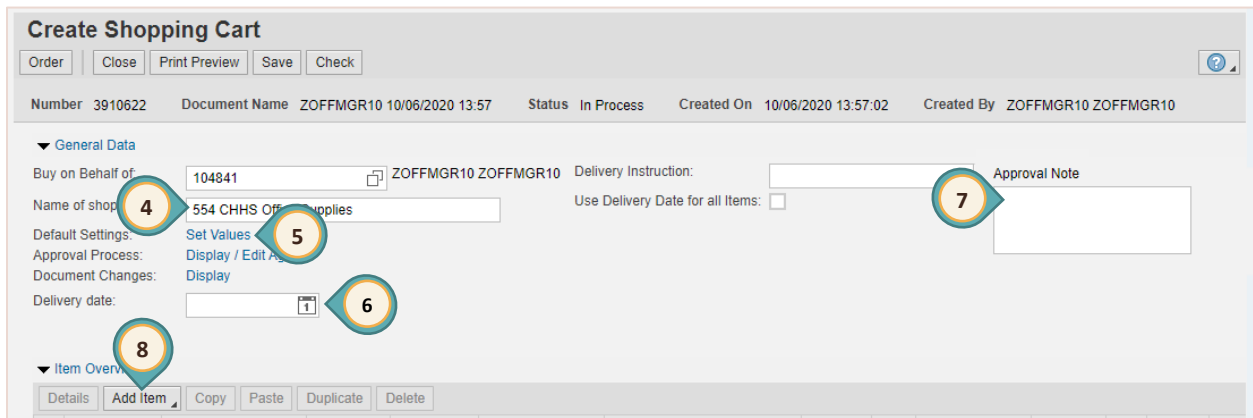
# Create Shopping Cart

1. Select the *Work* tab.
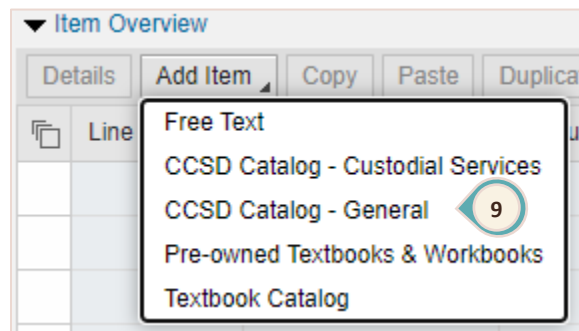2. Select *Shop*.
3. Select SHOPPING CART from the menu on the left.

    The **Create Shopping Cart** window opens in a new window.
4. Edit NAME OF SHOPPING CART.
5. Change DEFAULT SETTINGS if necessary.
6. Enter DELIVERY DATE if necessary.
7. Enter APPROVAL NOTE if necessary.
8. Click ADD ITEM.





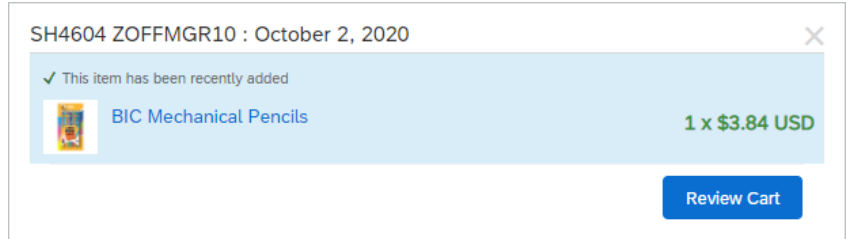9. Select the desired catalog (for this example, the CCSD Catalog - General was selected).

The window refreshes to display **Ariba Product Catalog**.

10. Enter KEYWORD search criteria (i.e., item name or number).
11. Click SEARCH or press the **Enter** key.
12. Click the SELECT box for desired item.
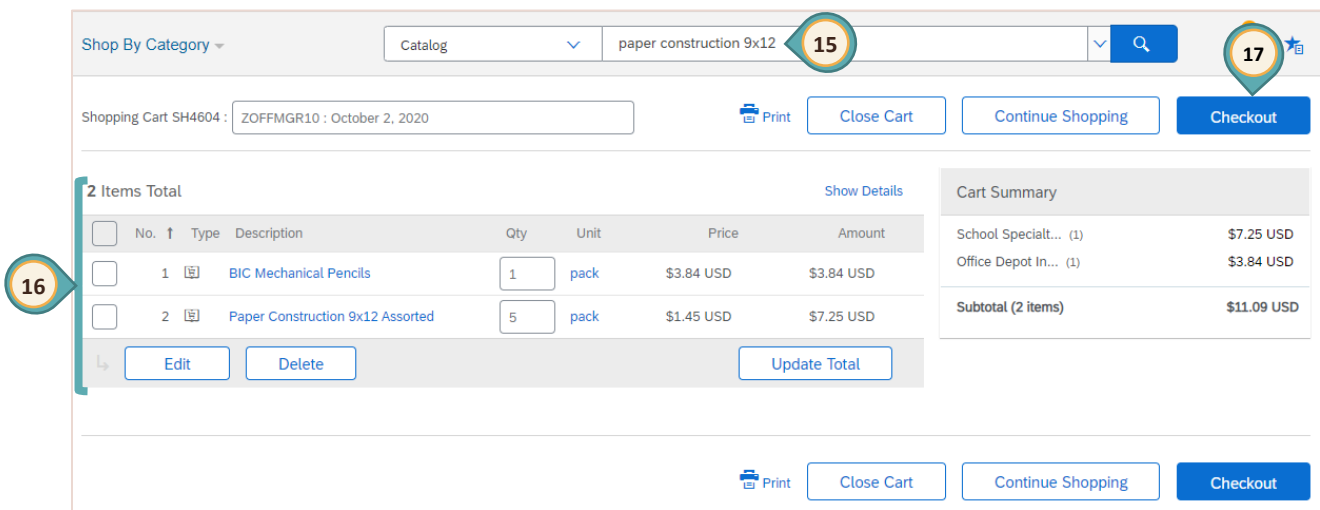13. Change QUANTITY as desired.
14. Click ADD TO CART.

A window appears to confirm the item was added to the Cart. Click outside this window to continue shopping **or** select Review Cart if finished.

> SH4604 ZOFFMGR10 : October 2, 2020 ✕
> ✓ This item has been recently added
> BIC Mechanical Pencils 1 x $3.84 USD
> Review Cart

15. Enter a new **Keyword** search criteria or click the **Continue Shopping** button to continue to add additional items to the Cart.
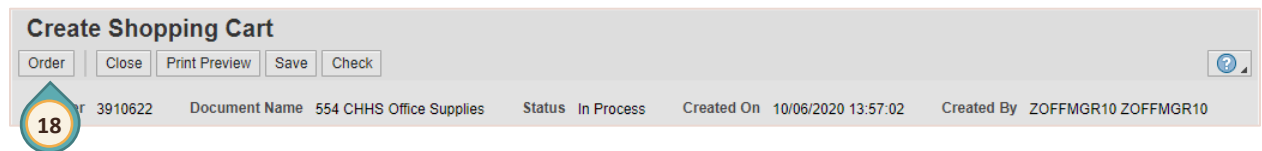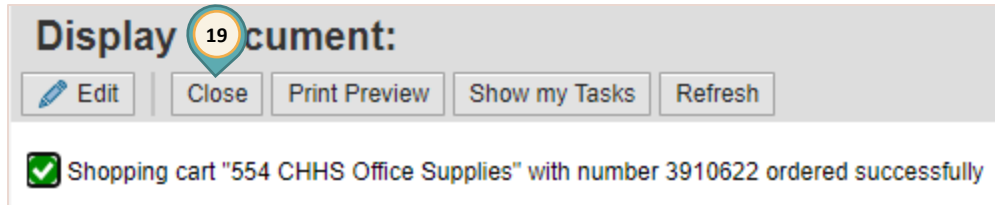16. Review all items and quantities. Make changes if necessary.
17. Click **CHECKOUT**.

| No. ↑ | Type | Description | Qty | Unit | Price | Amount |
|---|---|---|---|---|---|---|
| 1 | | BIC Mechanical Pencils | 1 | pack | $3.84 USD | $3.84 USD |
| 2 | | Paper Construction 9x12 Assorted | 5 | pack | $1.45 USD | $7.25 USD |

Shopping Cart SH4604 : ZOFFMGR10 : October 2, 2020

2 Items Total — Show Details

Cart Summary
School Specialt... (1) $7.25 USD
Office Depot In... (1) $3.84 USD
Subtotal (2 items) $11.09 USD

Edit | Delete | Update Total

Print | Close Cart | Continue Shopping | Checkout

**IMPORTANT!**
When shopping and adding items to this holding area, the user is **NOT** communicating directly with the **SAP** system, so the user must take care to transfer items (**CHECKOUT**) to the SAP shopping cart every 5 minutes. (This ensures that the user is not logged out of SAP for inactivity in the system.

18. After the checkout process is complete, the window will close and the **Create Shopping Cart** window will be displayed. Click **ORDER**.

**Create Shopping Cart**
Order | Close | Print Preview | Save | Check

...r 3910622   Document Name 554 CHHS Office Supplies   Status In Process   Created On 10/06/2020 13:57:02   Created By ZOFFMGR10 ZOFFMGR10

A message will appear stating that the Shopping Cart was ordered successfully.
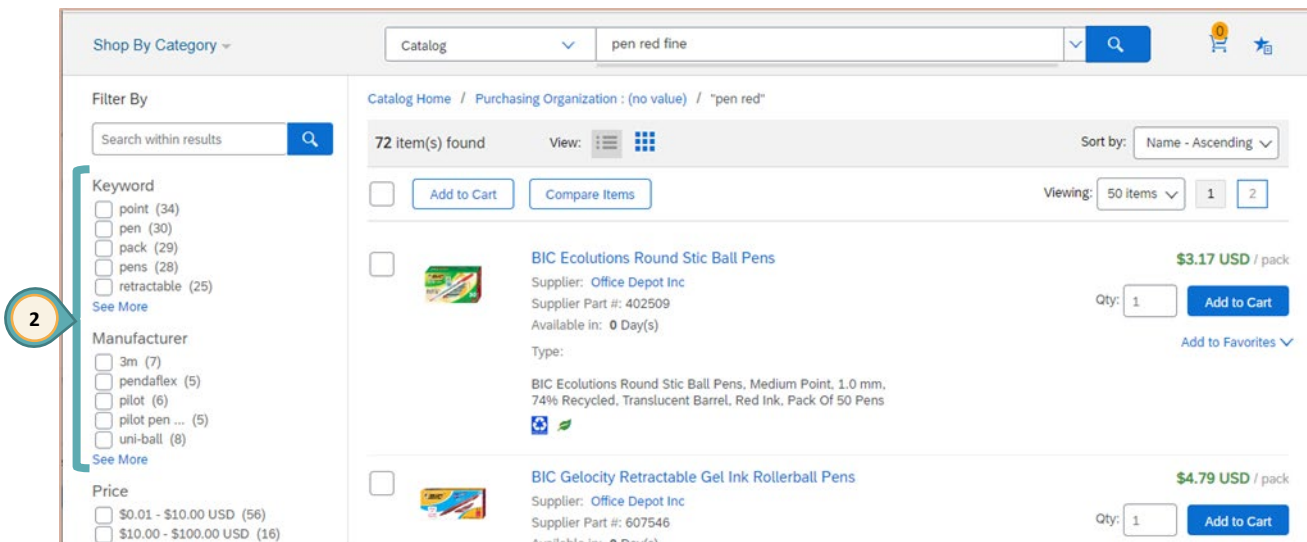
19. Click the **CLOSE** button. (Do **NOT** use the **X** in the upper right corner of the browser window.)

## Search Hints

1. Narrow search results by adding more descriptive words to the keyword search.
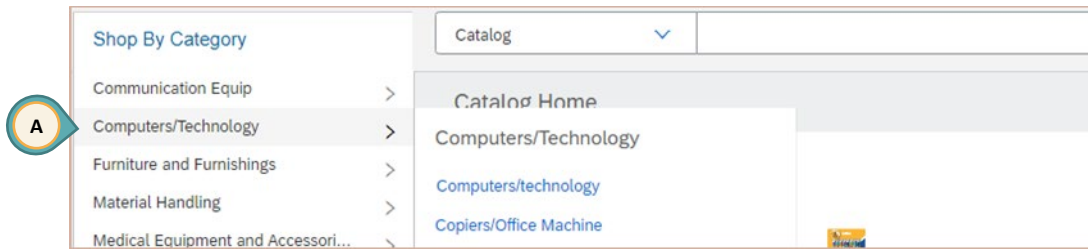


2. Use the **FILTER BY** checkboxes on the left to narrow the search by selecting additional keywords, manufacturers, suppliers, price, etc.
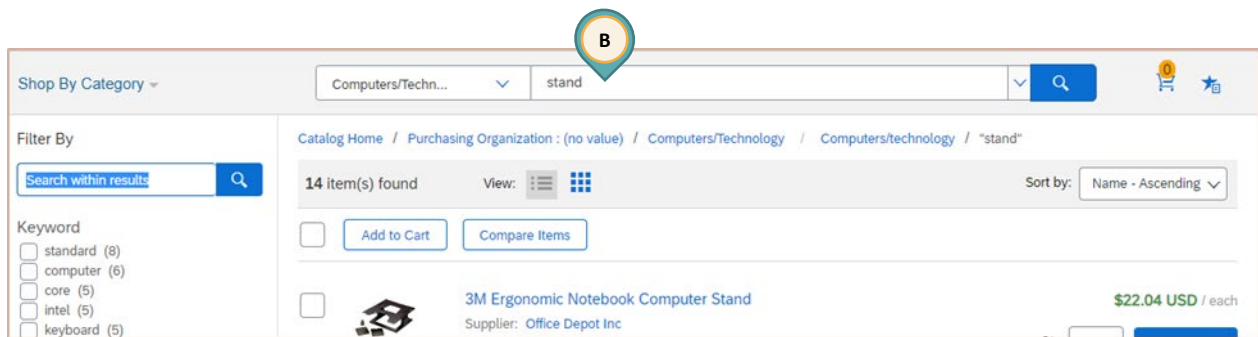
3. To use the SHOP BY CATEGORY feature:

A) Hover over a main category and select a category from the menu.



B) Enter a **keyword** to search for an item within the selected category.



## 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:** Opens the **Details for item** area at the bottom of the window, which includes Item Data, Account Assignment, Notes and Attachments, and Sources of Supply.
- **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.

## Adjusting Default Settings: Coding or Storage Location

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 the ACCOUNT ASSIGNMENT tab. | 2. Select the ITEM DATA tab. |
| 3. Select the ACCOUNT ASSIGNMENT Category. | 3. Click the STORAGE LOCATION search button. |
| 4. Select ASSIGN NUMBER. | 4. Select the new location. |
| 5. Click OK. | 5. Click OK. |

| If charging to a . . . | Then change . . . |
|---|---|
| Grant<br><br>* _Must have grant information - (702) 799-5224_ | Cost Center drop-down to Order, enter the internal order number. |
| Special Revenue | Cost Center drop-down to Order, enter the internal order number. |
| Different Cost Center Group | Use the drop-down to choose a different Cost Center. This Cost Center must be attributed to a different Cost Center Group. |

**IMPORTANT!**
If you have not completed your shopping cart and you Save it for completion later, you **MUST** change the default coding **AGAIN** when you come back to complete the shopping cart! Changes to default coding will only be transferred to new items. Items already in the shopping cart will be unchanged.

## 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 the line.
2. Click **Details**.

3. Select the ACCOUNT ASSIGNMENT tab.
4. Click the ASSIGN NUMBER search button.

5. Select the desired account number.
6. Click OK.

# *Free Text Order*

A Free Text Order is used when the needed item is not found in any CCSD catalog. Before creating a Free Text Order, it is recommended to:

1. Verify with the Purchasing and Warehousing Department that the item is not on bid with CCSD.
2. If the item is under $1,000 and can be purchased with the Pcard, proceed with that process. Call Accounting if the limit needs to be temporarily increased.
3. If the item isn't on bid, obtain a quote. Quotes should be obtained from approved CCSD vendors. Contact Purchasing and Warehousing for an approved vendor.

To create a Free Text Order:

1. Select the *Work* tab.
2. Select *Shop*.
3. Select SHOPPING CART from the menu on the left.

   The **Create Shopping Cart** window opens in a new window.

4. Edit NAME OF SHOPPING CART.
5. Change DEFAULT SETTINGS if necessary.
6. Enter DELIVERY DATE if necessary.
7. Enter APPROVAL NOTE if necessary.
8. Click ADD ITEM.
9. Select FREE TEXT.

The **Add Item with Free Description** window is displayed. Complete all of the following fields.

| Field | Description of Field |
|---|---|
| Description | Description of goods/services |
| Internal Note | Additional information provided to the buyer that will assist in obtaining the items requested. For example:<br><br>○ More detailed information of the goods/services<br>○ Dollar amount not to exceed<br>○ Timeframe/duration (if for service)<br> * *Example:* Once per month for one year, 07/01/2020 – 06/30/2021<br>○ Required on date<br>○ Suggested supplier's name, address, phone number (if available, but not necessary)<br>○ Quantity, if needed to further explain request<br>○ Complete description of goods/services<br>○ Dimensions, color, size, specifications, manufacturer name and number, etc.<br>○ Direct information (for the buyer eyes only)<br> * *Example:* "Do not order from XYZ Company; they were defective last time" |
| Product Category [1] | Identifies the buyer and the assigned G/L Account (cannot be "DEFAULT") |
| Quantity | How many items are required |
| Unit | Unit of Measure: Each, Dozen, Pack, Set, Case, Lot, etc. |
| Net Price | Cost of individual item |
| Delivery Date | Suggested delivery date |

10. Click **ADD TO ITEM OVERVIEW**.

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[1] Please contact the Purchasing Department at **(702) 799-5225** for assistance with determining Product Category.

11. Attach the quote to the order.

    a. Select the item **DESCRIPTION**.

    b. Select the **NOTES AND ATTACHMENTS** tab.

    c. Click **ADD ATTACHMENT**.
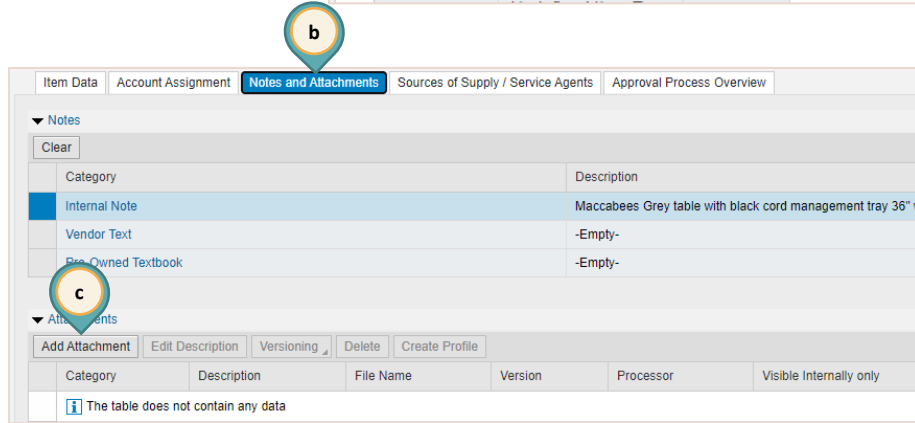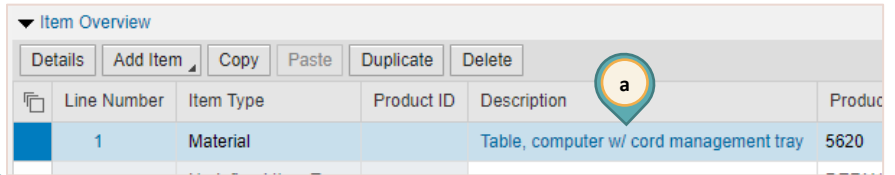
    d. **CHOOSE FILE** for the quote.

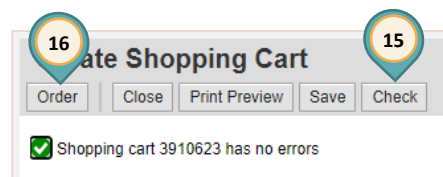    e. Enter the **DESCRIPTION**.

    f. Click **OK**.
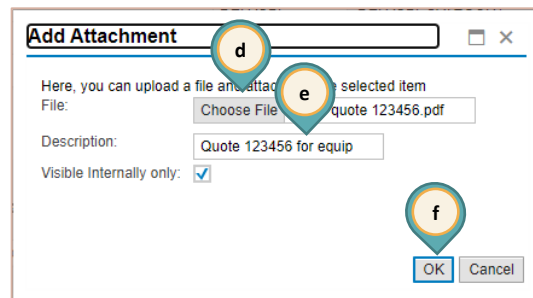
13. Continue adding line items to the order.
14. Add the **Shipping & Handling** fee.
15. Click **CHECK**.
16. Click **ORDER**.
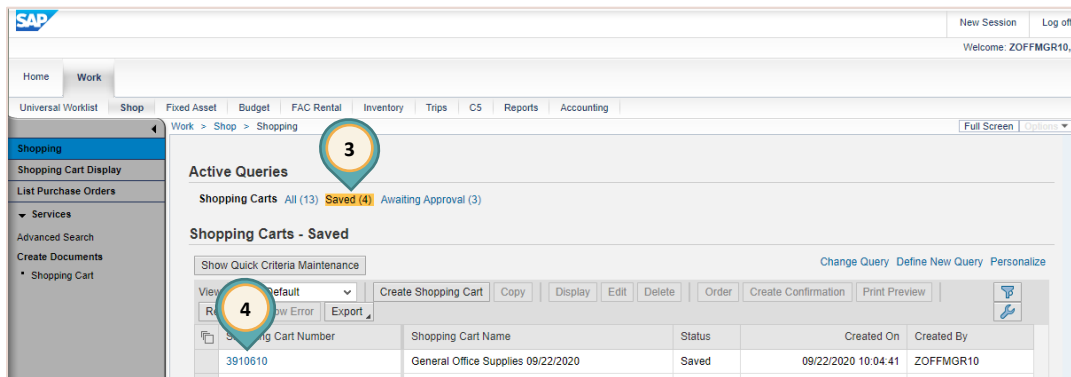
## Saved Shopping Cart
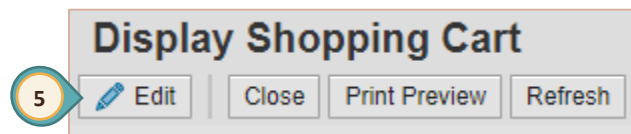
To complete or edit a shopping cart:



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

The work window displays the Active Queries.

3. Select SAVED to display the Saved Active Query results. (Select the REFRESH button to ensure that the most current results are displayed.)
4. Click the SHOPPING CART NUMBER to display the Shopping Cart in a new window.



5. Click EDIT.



6. Edit the shopping cart as needed (adjust quantity, add additional items, etc.).
7. Click ORDER.
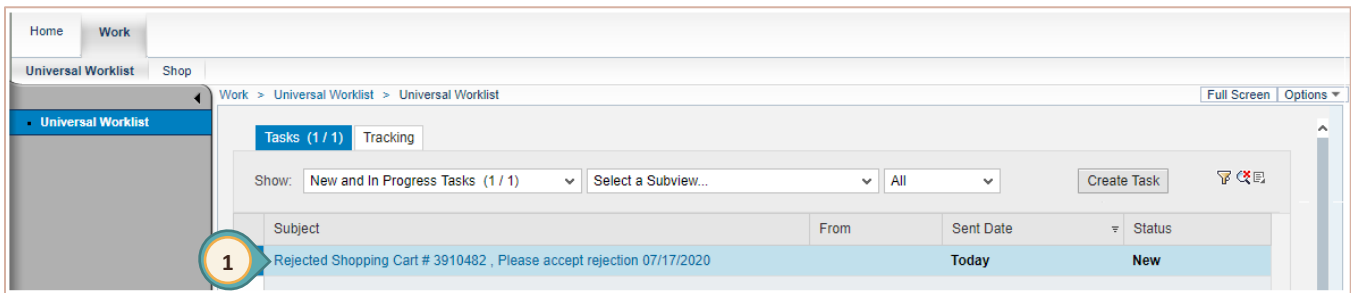8. Click CLOSE.



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🚦 **IMPORTANT!**
If the shopping cart Default Settings were changed (change in budget coding or delivery location), the Default Setting **MUST** be changed **AGAIN** before adding more items to the shopping cart.
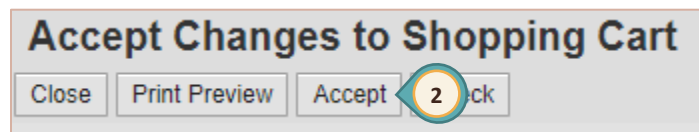
## Accept Rejected Shopping Cart

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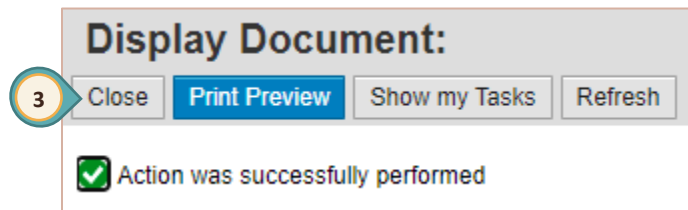
From the Universal Worklist (UWL):

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



2. The **Accept Changes to Shopping Cart** window opens in a new browser window. Click ACCEPT.



3. The Display Document window is displayed. Click CLOSE.



| | |
|---|---|
| | **IMPORTANT!**<br>Rejected shopping carts should **ALWAYS** be processed using the ACCEPT button.<br><br>If the Rejected Shopping Cart is not accepted within five business days, the SAP system will automatically accept it. If this occurs, user acceptance is no longer needed. |