

**xchangewales eTrading for
Schools User Manual
Release 4.6**

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About this Guide

1 About this Guide

1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the xchangewales eTrading for Schools system effectively.

Who is ProcServe?

ProcServe is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. ProcServe particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

What does ProcServe offer?

- ProcServe offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

What do our solutions consist of?

The ProcServe solutions are a blend of world-class application Commerce Modules, all hosted and managed by ProcServe, combined with professional service packages that ensure a swift implementation and maximum return on investment.

The ProcServe Commerce Network

ProcServe offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, ProcServe implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. ProcServe also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

2

xchangelwales eTrading for Schools Buyer Portal

2 xchangelwales eTrading for Schools Buyer Portal

2.1 Getting Started

2.1.1 Logging in to the ProcServe Trading Network

Overview

This describes how you access and login to the ProcServe Commerce Network.

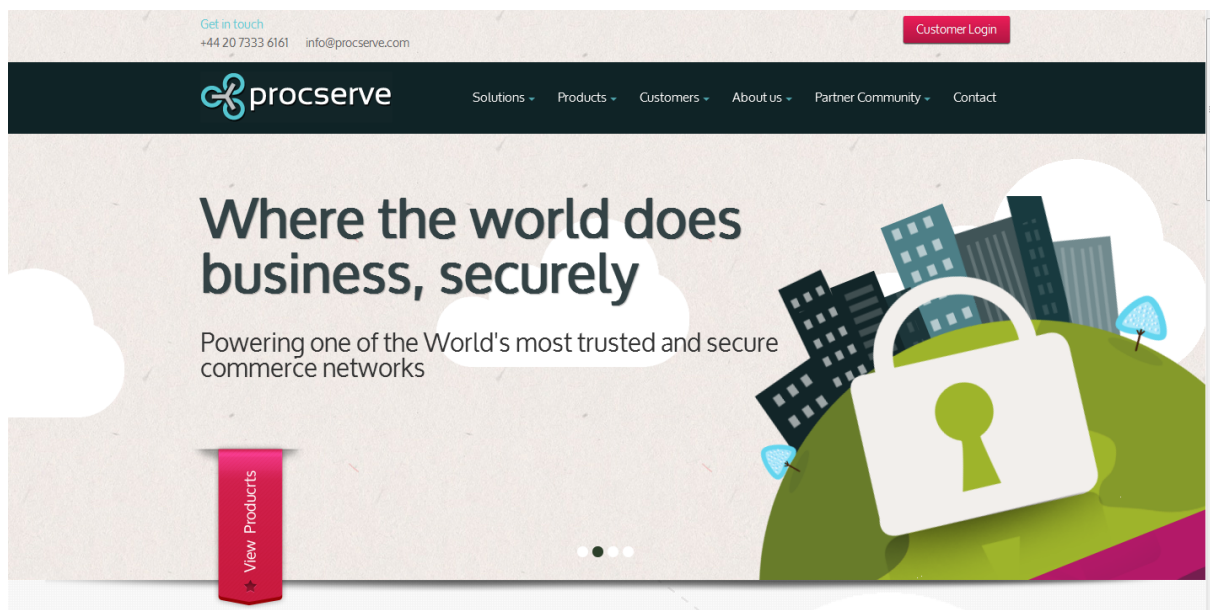
Pre-Requisites

In order to access the ProcServe Commerce Network you will need a username and password. Your username and password will be emailed to you. If you do not have this information please contact your local administrators.

Locating the ProcServe home page

The following list describes how you access and login to the ProcServe Commerce Network:

1. Browse to <http://www.procservice.com/>.
2. The ProcServe home page is displayed:
3. Click the customer login button (top right) in the main navigation bar:



4. The customer login page is displayed:
5. Click the xchangelwales eTrading for Schools logo:

Get in touch
+44 20 7333 6161 info@procserve.com

Customer Login

procserve Solutions Products Customers About us Partner Community Contact

Home > Login

Customer Login

Procserve P2P login

Customer Support Numbers

Buying Organisations Procserve
+44(0)845 603 6727 or [email](#)

Zanzibar
+44(0)845 603 2885 or [email](#)

OPEN
+44(0)845 600 6736 or [email](#)

xchangelwales eTrading
+44(0)845 602 9802 or [email](#)

xchangelwales eTrading for

2.1.2 My Profile

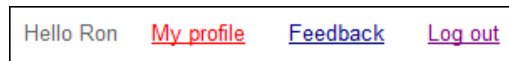
Overview

You can view or edit your user profile details or change your password using the My Profile page.

Locating My Profile

The following steps describe how to locate and use the My Profile page:

1. In the top menu bar click the My Profile link:



2. The My Profile page is displayed:



3. The My Profile page allows you to view and change your details:

Click the Edit my Profile button to display the User Profile page in edit mode:

 A form titled 'Edit My Profile' with a light gray border. It contains several input fields and checkboxes. The fields are: Title (dropdown menu with 'Mr' selected), First name* (text box with 'Monty'), Last name* (text box with 'Pylon'), Status (text 'Active'), Username (text 'ronsmail@agbuyer'), Email address* (text box with 'monty@tiscali.co.uk'), Confirm Email address* (text box with 'monty@tiscali.co.uk'), Organisation (text 'ADAM BUYER ORG'), Default address* (dropdown menu with 'LANTERN HOUSE, GU14TX, GUILDFORD' selected), Telephone number (text box with '01483 222222'), Fax number (text box with '01483 222244'), and Preferred language (dropdown menu with 'English (UK)' selected). Below these fields are three checkboxes: 'Message Of The day' (checked), 'News' (checked), and 'Welcome message' (checked). At the bottom of the form is a button labeled 'Save Changes'.

4. The following is displayed and can be edited:

FIELD NAME	FIELD CONTENT
Title, First Name, Last Name	Mandatory

Username	Cannot be changed
Email Address	Mandatory
Confirm Email Address	Mandatory
Organisation	Cannot be changed
Default Address	Mandatory
Telephone Number	Optional
Fax Number(Optional).	Optional
Preferred Language	
Data Feeds	Admin Users Only
Catalogue / Classification Views*	Admin Users Only

*Not used by organisations who access the system from their P2P system.

Warning! Email addresses are unique within ProcServe, they can only be used once.

5. Save Changes Button:

When you have finished making changes to your profile you click this button to validate, and if valid, save your changes.

Note: Changes to your profile may not be completed until after you log back into the system.

Password change. This area allows you to change your password:

Change your password

Please note that your password (for security reasons) must follow these rules:
Minimum of 6 character(s).

Enter your current password

Enter your new password

Please re-enter your new password

Save new password

6. Enter your existing and new password to change your password:

The entries are validated and, if valid, the system will display a message:

Success! You have changed your password. The next time you log in you will need to use this new password.

Memorable Word Change. This area allows you to change your memorable word:

Change your memorable word

This is a word that is personal to yourself, easy to remember and can be any word that you choose to use but you must ensure that: It is at least 8 characters long. It is kept safe and secure.

The memorable word hint is a reminder of your memorable word in case you forget it.

New memorable word	<input type="text"/>
New word again	<input type="text"/>
Memorable word hint	<input type="text" value="game with ball"/>

Save new memorable word

7. Enter your new memorable word and hint to change your memorable word:

The entries are validated and, if valid, the system will display a message.

2.1.3 Unlocking your Account

Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

Unlocking your account

1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:

Hello Buyer_

Your account has been locked due to too many invalid login attempts. To unlock your account you will need both a User Name and Access Key (included below) and you will need your Memorable Word, which you specified in your account profile.

Your Access Key is: YDRM3DDN

You can unlock your account at:

https://saturn-buyers.procserviceonline.com/otis/auth.html?marketplaceId=2&locale=en_GB

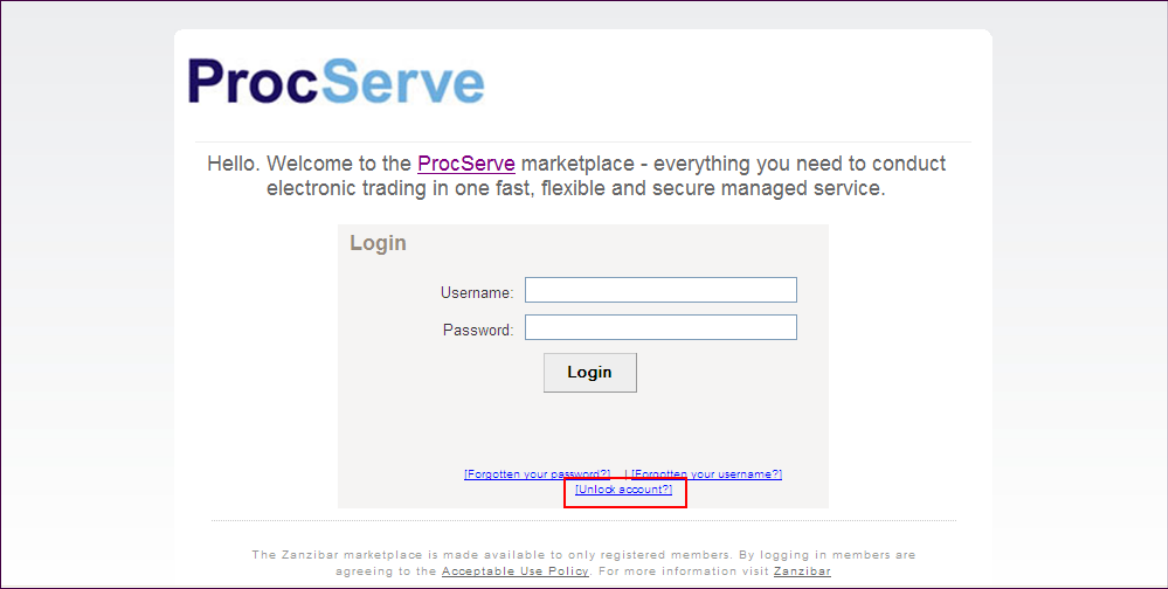
It is recommended that instead of typing the Access Key, try copying and pasting it into the unlock screen using the following steps:

1. Highlight the Access Key making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the Access Key field of the unlock screen right click again and select 'Paste'


If you have any questions please contact the Zanzibar Service Desk via zanzibarhelpdesk@procservice.com

Thank you.

2. Navigate to the url within the email or use the 'Unlock account?' on the login page:



3. Enter your user name and access key that was issued in the email:



Hello. Welcome to the **ProcServe** marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.

Unlocking Your Account 1 of 2
Please enter your username and the randomly generated access key contained in the email you received.


Enter your details

Username:

Access key:

Submit

4. Enter your memorable word using the hint written in the instructions bar:



Hello. Welcome to the **ProcServe** marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.

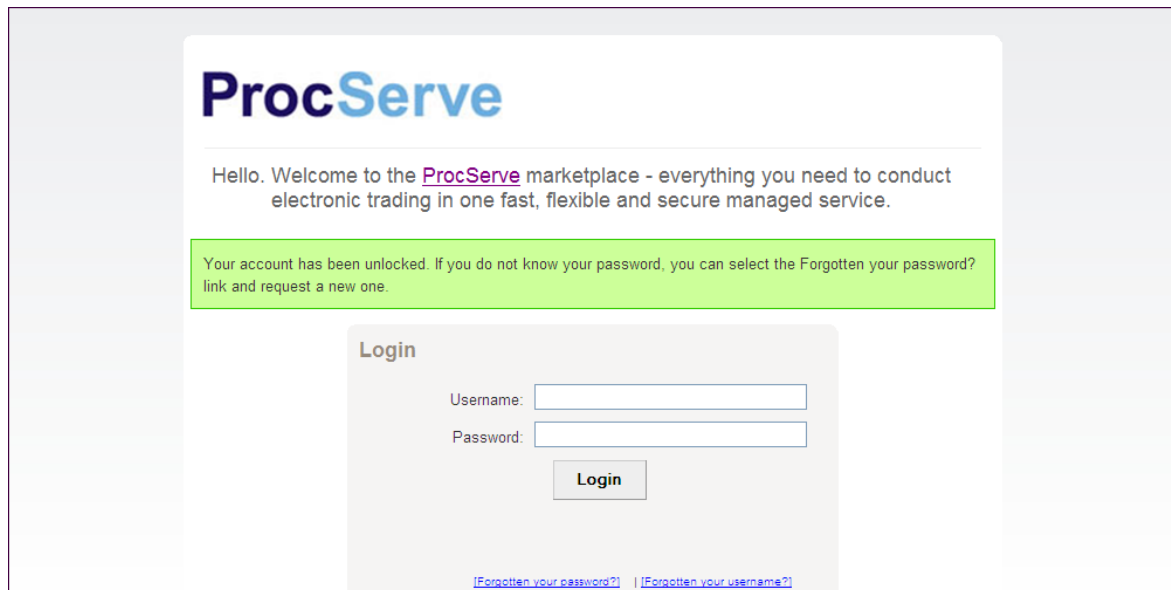
Unlocking Your Account 2 of 2
Please enter your memorable word. Note that the memorable word is case sensitive. You have defined the following hint:
game with ball

Enter your memorable word

Memorable word:

Unlock

5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you:



The image shows a web page for ProcServe. At the top, the ProcServe logo is displayed in blue. Below the logo, a welcome message reads: "Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service." A green box contains a message: "Your account has been unlocked. If you do not know your password, you can select the Forgotten your password? link and request a new one." Below this is a login form with the title "Login". It contains two input fields: "Username:" and "Password:". A "Login" button is positioned below the password field. At the bottom of the form, there are two links: "[Forgotten your password?]" and "[Forgotten your username?]".

ProcServe

Hello. Welcome to the [ProcServe](#) marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.

Your account has been unlocked. If you do not know your password, you can select the [Forgotten your password?](#) link and request a new one.

Login

Username:

Password:

Login

[\[Forgotten your password?\]](#) | [\[Forgotten your username?\]](#)

2.1.4 Feedback

Overview

You provide feedback to us using the Feedback page.

Locating the Feedback Page

The following steps describe how to locate and use the Feedback page:

1. In the top menu bar click the Feedback link:

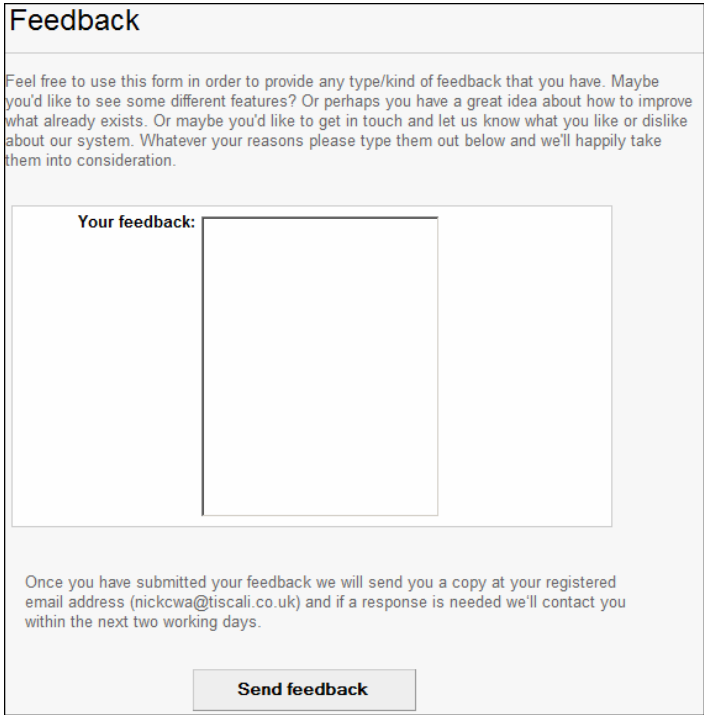


Hello Ron [My profile](#) [Feedback](#) [Log out](#)

The Feedback Page is displayed:

2. Enter your feedback in the text area:

3. Click the send feedback button:



Feedback

Feel free to use this form in order to provide any type/kind of feedback that you have. Maybe you'd like to see some different features? Or perhaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system. Whatever your reasons please type them out below and we'll happily take them into consideration.

Your feedback:

Once you have submitted your feedback we will send you a copy at your registered email address (nickcwa@tiscali.co.uk) and if a response is needed we'll contact you within the next two working days.

Send feedback

Note: Please do not report system errors using this form, please email or call the ProcServe service desk.

2.1.5 Getting Support

The ProcServe Commerce Network provides full support services via a dedicated service desk.

Contact details for the service desk are shown below and can also be found by clicking "Contact Helpdesk" at the bottom of each page on the buyer portal:

How to reach us	Comments
Email: xchangewalesschools@procserve.com	Please provide full contact details, organisation name and a description of the support issue / query.
Telephone : 0845 6029803	For general queries, questions and support issues.

2.2 Buyer Menu

2.2.1 Supplier Directory

2.2.1.1 Supplier Directory Overview

Overview

This section shows how you can use Supplier Directory.

The Supplier Directory allows you to see what suppliers you have traded with and what suppliers are available to your Marketplace.

Note: A supplier is shared amongst many buying organisations. A supplier listed under the Supplier Directory may not mean they have provided your buying organisations with a catalogue to buy from.

Supplier Directory

[Suppliers my organisation has traded with](#) [Search all available suppliers](#) [Browse available suppliers](#)

Supplier name	DUNS	Category	Telephone Number
OGCBS Supplier	919191919	N/A	

Basic and Enhanced suppliers

All suppliers are assigned a category based on the highest level of enablement they support. This category is an indication of their ability and does not mean they support this level of enablement for every buying organisation:

There are 4 categories of suppliers: Basic, Bronze, Silver and Gold. These are explained below:

BASIC

Basic suppliers have been invited to join the marketplace but have not yet registered. They can be viewed in the Supplier Directory and can be used for Free Text Orders. They are not able to return eInvoices..

BRONZE

Bronze suppliers are registered on the marketplace and are able to return eInvoices and other eDocuments for all buying organisations.

SILVER

Silver suppliers are registered on the marketplace and provide electronic content (catalogues, etc) to at least one buying organisation.

GOLD

Gold suppliers are registered on the marketplace and have integrated their systems into the marketplace, meaning that they can process your orders more efficiently.

Note: The category (Basic, Bronze, Silver and Gold) is current status of the supplier. For example if a supplier has a catalogue they will be shown as a silver supplier. If they remove their catalogue there status will reflect this by showing the supplier as bronze.

2.2.1.2 The Supplier Directory

Overview

You can view Suppliers you trade with or you can search or browse for available Suppliers using the Supplier Directory feature.

Locating the Supplier Details Page

The following steps describes how you locate and use the Supplier Details page:

1. **Navigate Buyer Menu >> Supplier Directory.**
2. **The Supplier Directory page is displayed.**
3. **The Supplier Directory page contains three tabs.**
These are described in the following steps.

4. **Suppliers my organisation has traded with tab.**

This tab allows you to view suppliers who your organisation has traded with:

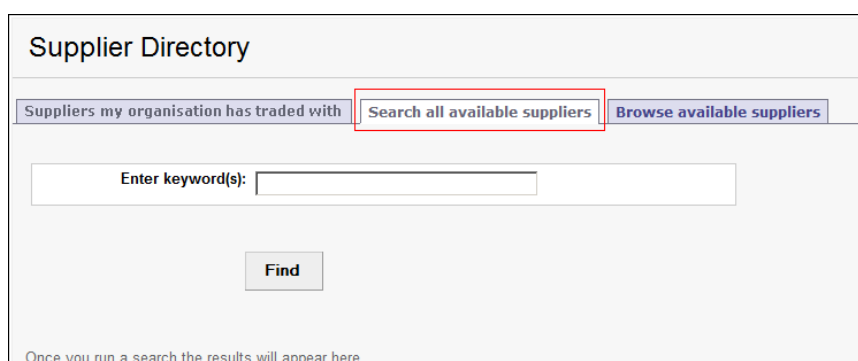
Supplier Directory			
Suppliers my organisation has traded with			
Search all available suppliers Browse available suppliers			
Don't see your supplier here? Request a new supplier >			
First/Prev] 1, 2 [Next/Last]			
Supplier name	DUNS	Category	Telephone Number
Oxford Computer Consultants Ltd	235221780	N/A	-
3M Healthcare	212340298	N/A	-
A and C Black	210028353	N/A	-
AJS Test3	101010105	N/A	0123
DCSF Test Supplier	339911771	N/A	02073336176
DePuy International Limited	896498813	N/A	-
DHL Global Mail Ltd	965317441	N/A	-
ESPI Supplier Account	800000008	N/A	01706747328
Gailarde Ltd	211612478	N/A	-
Keane Ltd	227657251	N/A	-

The following list describes how you use the above tab:

4.1 Request a New Supplier Link. If you cannot locate a Supplier you can send a Service Request to the ProcServe service desk.

4.2 Supplier List. You can view the details listed or click a Supplier Name to load the Supplier Profile page.

5. Search all available suppliers tab. This tab allows you to search for a Supplier within the Marketplace using key words:



Supplier Directory

Suppliers my organisation has traded with **Search all available suppliers** Browse available suppliers

Enter keyword(s):

Find

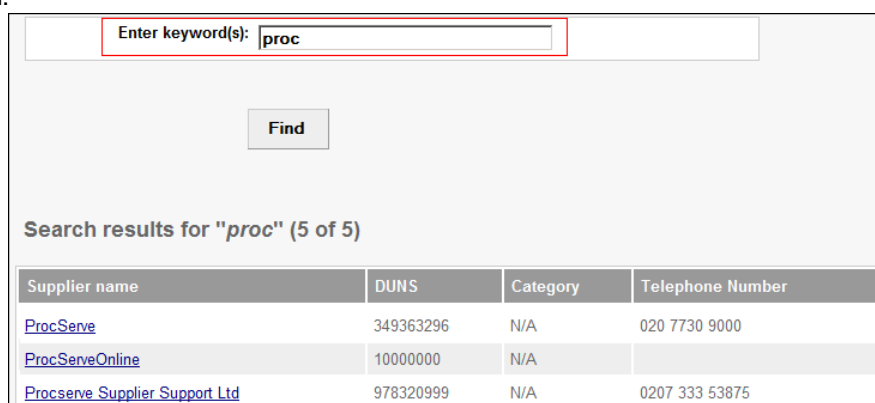
Once you run a search the results will appear here.

The following list describes how you use the above tab:

5.1 Enter Keywords. Enter the key words you wish to search on.

5.2 Find Button. Click the Find button.

5.3 Results. If one or more Suppliers matched your key words then a list of Supplier is displayed:



Enter keyword(s): **proc**

Find

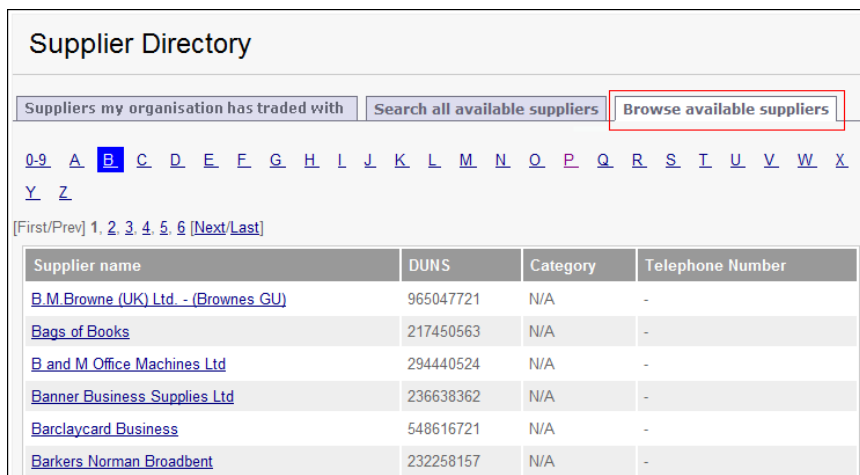
Search results for "proc" (5 of 5)

Supplier name	DUNS	Category	Telephone Number
ProcServe	349363296	N/A	020 7730 9000
ProcServeOnline	10000000	N/A	
Procserve Supplier Support Ltd	978320999	N/A	0207 333 53875

You can view the details listed or click a Supplier Name to load the Supplier Profile page.

6. Browse available suppliers tab.

This tab allows you to browse Suppliers within the Marketplace alphabetically or numerically. For example:



The screenshot shows the 'Supplier Directory' interface. At the top, there are three tabs: 'Suppliers my organisation has traded with', 'Search all available suppliers', and 'Browse available suppliers' (which is highlighted with a red box). Below the tabs, there is a navigation bar with links for '0-9', 'A', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'I', 'J', 'K', 'L', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', and 'Z'. The letter 'B' is highlighted with a blue box. Below the navigation bar, there is a pagination link '[First/Prev] 1, 2, 3, 4, 5, 6 [Next/Last]'. The main content area displays a table of suppliers.

Supplier name	DUNS	Category	Telephone Number
B M Browne (UK) Ltd - (Brownes GU)	965047721	N/A	-
Bags of Books	217450563	N/A	-
B and M Office Machines Ltd	294440524	N/A	-
Banner Business Supplies Ltd	236638362	N/A	-
Barclaycard Business	548616721	N/A	-
Barkers Norman Broadbent	232258157	N/A	-

6.1 Select Letter or Number. Click the letter or number (0-9) . In the above image "B" has been clicked.

6.2 Results. As shown in the above image if one or more Suppliers matched your letter or number then a list of Supplier is displayed.

You can view the details listed or click a Supplier Name to load the Supplier Profile page.

2.2.1.3 The Supplier Profile Page

Overview

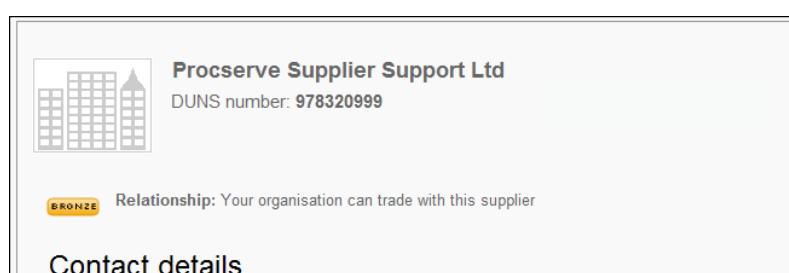
The supplier profile page displays supplier information as the result of a search from the supplier directory.

You can use the supplier profile page to view supplier details or to hide a supplier so it cannot be used in your organisation.

Locating the Supplier Profile Page

The following steps describes how you access and use the supplier profile page:

1. The Supplier Profile page is displayed when you select a supplier in a list in the Supplier Directory.



2. The Supplier Profile Page Details.

The Supplier Profile consists of the following areas:


Supplier Basic Details (shown above):

This area displays:

DUNS Number	A DUNS Number is a nine-digit code assigned by Dun & Bradstreet to identify unique business's separate and distinct operations.
Supplier Relationship	The two types of supplier are Basic and Enhanced. Suppliers can be Bronze (accepts electronic orders and can produce electronic invoices and credit notes etc), Silver (provides one or more catalogues) or Gold (fully integrated). Basic suppliers can only accept orders as email attachments and cannot use the ProcServe electronic forms.

Contact Details:

This area displays Supplier Contact details:

Registered name	Procserve Supplier Support Ltd
Email	dman@mail.com
Telephone number	0875 875 53875
Address	67, Great St London, EC36CC GB
 Download as a vCard What is this?	

Tip: You can contact the suppliers using the details stored:

- You can click the email field to send an email to us if you have a local mail program installed, for example Outlook.
- Click the Download as vCard link to download the Supplier details as a vCard. When you click the link a prompt will appear. You can save the vCard to your computer and import it onto your mail program later.

Financial and other Information:

This area holds finance and other details:

Financial information	
Tax code	235634
Tax Number	7777
Payments accepted	Cheque, Cash
Currencies accepted	Pound Sterling
Other information	
Short name	PSSSup

2.2.2 Schools RFQ Management

2.2.2.1 Schools RFQ Management Overview

This guides you through the process of managing Requests for Quotation (RFQ).

You use this section to find out how to:

- **Use the RFQ Overview Page.**
- **Build and send the RFQ.** These are steps describing how to create, add details and send an RFQ:
 - Add Items to a RFQ.
 - Enter RFQ details.
 - Select the Suppliers that will receive the RFQ.
 - Confirm the RFQ details and send it.

- **The RFQ Details Page.** After you have created an RFQ you can view and work with RFQs in the RFQ Details page.

You can use the RFQ details page to perform the following tasks:

- **Close an RFQ with No Winner.**
- **Re-Issue an RFQ.** You can re-issue an RFQ at any time during it's life.
- **Withdraw a RFQ.** You can withdraw open RFQs.
- **Work with Bids.** When bids have been received you need to know how to deal with them:
 - **Working with Bids in the system.**
 - **Selecting a Winning Bid.**
 - **Notify Unsuccessful Bidders.** When you have awarded a bid you can notify unsuccessful bidders.
 - **Unaward a Successful Bid.** If you change your mind you can revoke a winning bid.

2.2.2.2 The Schools RFQ Overview Page

Overview

You use the RFQ Overview page to view and work with RFQs.

Locating the RFQ Overview Page. The following steps describe how you locate and use the RFQ Overview page:

1. Navigate **Buyer Menu >> RFQ Management**.
2. The system displays the RFQ Management Overview page:

RFQ Management - RFQ overview				
Closed RFQs, waiting for your action (3) ①				
RFQ name / ID	Issue Date	Close Date	Bids	
RFQ00000004 - Taxi contract	03 February 2009	03 February 2009	0	
RFQ00000002 - Taxi contract	03 February 2009	03 February 2009	0	
RFQ00000001 - Chairs for new office	09 January 2009	09 January 2009	0	
Open RFQs (1) ②				
RFQ name / ID	Issue Date	Close Date	Bids	
RFQ00000005 - A4 Paper packs 80gsm	04 March 2009	04 March 2009	0	
The 5 most recently completed RFQs ③				
RFQ name / ID	Issue Date	Close Date	Bids	Status
RFQ00000003 - Taxi contract	03 February 2009	03 February 2009	0	Closed with no winner
View all archived RFQs				

3. **Using the RFQ Management Overview Page.** The following list describe how you use the RFQ Management Overview page:

- **Add New RFQ.** To add a new RFQ you can click the **Buyer Menu >> RFQ Management >> Add a RFQ** link. The Create New RFQ wizard is started.
- **Closed RFQs (1).** This area lists summary details of closed RFQs and are waiting for action from you. The number of closed RFQs is displayed in brackets above the list. Click the link to load an RFQ into the RFQ Details page where you can view or work with the RFQ and associated bids.
- **Open RFQs (2).** This area lists summary details of open RFQs. Click a link to load the RFQ into the RFQ Details page where you can view or work with the RFQ.
- **5 most recently completed RFQs (3).** This area lists summary details of the last 5 completed RFQs. Click a link to load the RFQ into the RFQ Details page. You may be able to re-issue a completed RFQ. You can click the View all Archives link to view a list of archived RFQs.

4. **Using the RFQ Archives Page.** You can view a list of RFQ Archives:

RFQ archive

[« Back to RFQ overview](#)

All your completed RFQs (awarded, closed with no winner and withdrawn) (1)

RFQ name / ID	Issue Date	Close Date	Bids	Status
RFQ00000002 - Taxi contract	03 February 2009	03 February 2009	0	Closed with no winner

Click the RFQ Name/ID link to view the RFQ in the RFQ Details page and re-issue this RFQ.
Click the Back to RFQ Overview link to return to the RFQ Overview Page.

2.2.2.3 Creating a New Schools RFQ

2.2.2.3.1 Step 1 - Adding RFQ Items

Overview

This describes how you add items to an RFQ as part of the Create New RFQ wizard.

In order to do this you need to activate the Adding RFQ Wizard.

Locating the Adding RFQ Items Step 1. The following steps describe how you start and add items to an RFQ:

1. Navigate to **Buyer Menu >> RFQ Management >> Add a RFQ.**
2. The following image is an example of the Step 1 - Add Items area:

3. **Adding RFQ Items.** You need to complete the item details for each item in the RFQ:
4. **Item Details.** The following details are required for each item:
 - 4.1. **Item Name.** You must enter a name for each item.
 - 4.2. **Item Description.** You must add a description for each item.
 - 4.3. **Quantity.** You must enter a quantity you wish to be quoted on for each item.
 - 4.4. **Unit of Measure.** You can select an optional unit of measure from the drop down list.
 - 4.5. **Target Price (GPB).** The price you wish to pay in your organisations's default currency.
 - 4.6. **Add a Document.** You can add a document that will help you communicate your requirement to the Supplier.
5. **Add Item Button.** When you have added the first item you click this button to validate and, if valid, save the first item to the RFQ.

6. The system adds the item to the RFQ:

Step 1 - Add items

Item name	Item description	Quantity	Unit of measure	Target price (GBP)	Total (GBP)	Attachment	Remove from list
Paper Pack	A4 80gsm recycled	100.00	Boxes	4.99	499.00		<input type="checkbox"/>
Total (without tax):					499.00		<button>Remove Selected</button>

Please add the items you would like quotes for using the form below. Once you have added all the items, click the "Next: Step 2" button which will appear above.

Add a new item

7. The item appears in the area above the Add Items fields.

8. Add More Items?

8.1. If you want to add more items to the RFQ enter the next item details and click the Add Item button.

9. **Removing RFQ Items.** To remove one or more items follow these instructions:

9.1. Check the Remove From list box for each item you wish to remove:

Item name	Item description	Quantity	Unit of measure	Target price (GBP)	Total (GBP)	Attachment	Remove from list
Paper Pack	A4 80gsm recycled	100.00	Boxes	4.99	499.00		<input type="checkbox"/>
Envelopes	Pack of 5	100.00	Packs	1.00	100.00		<input checked="" type="checkbox"/>
Total (without tax):					599.00		<button>Remove Selected</button>

9.2. Click the Remove Selected button:

Tip: No prompt is displayed so make sure you really want to delete the items.

Item name	Item description	Quantity	Unit of measure	Target price (GBP)	Total (GBP)	Attachment	Remove from list
Paper Pack	A4 80gsm recycled	100.00	Boxes	4.99	499.00		<input type="checkbox"/>
Total (without tax):					499.00		<button>Remove Selected</button>

9.3. The item is removed.

10. **Finishing Adding Items.** When you have added all the items to the RFQ click the Tell us about this RFQ

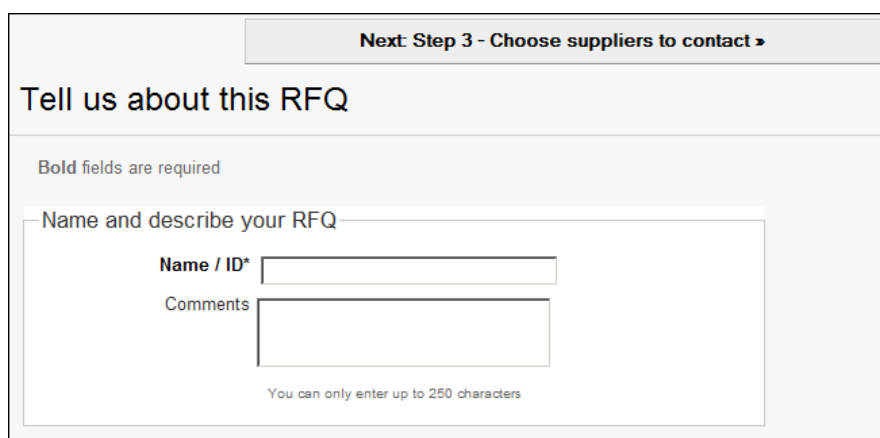
2.2.2.3.2 Step 2 - Tell us About your RFQ

Overview

In step 2 of the Create New RFQ wizard you add details to your RFQ.

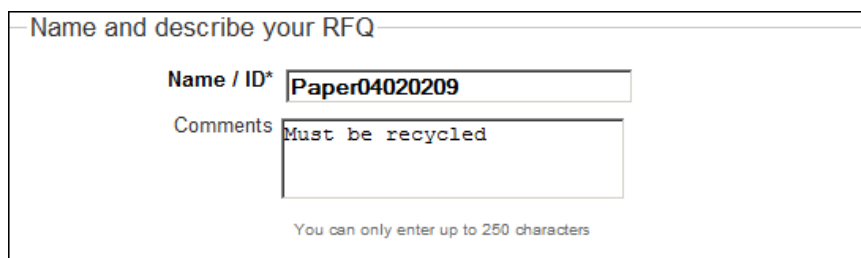
The following steps describe the Tell us About this RFQ wizard page:

1. **The Tell us About this RFQ Wizard Page.** After you have finished Adding RFQ Items the Tell us About this RFQ wizard page is displayed:

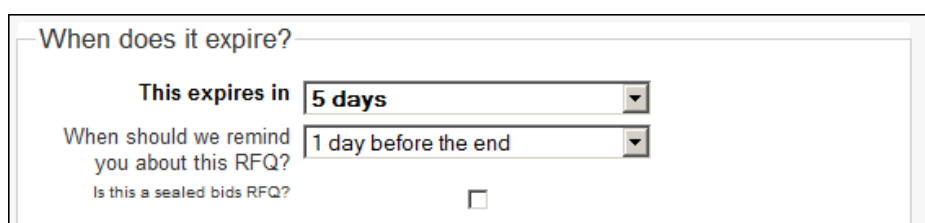


2. The following list describes the Tell us About this RFQ wizard page:

- 2.1. **Basic Details.** You can add a Name/ID (mandatory) and some comments (optional). For example:



- 2.2. **Expiry Details and Reminder:** You can change the default number of the days the RFQ will expire and select if and when you would like a reminder that the RFQ is about to expire. If the RFQ is a sealed bid you can check the relevant box. For example:



- 2.3. **Changing the Delivery Address.** You can view and change the default shipping address. For example:

Where will the items be needed?

Shipping address:

LANERN HOUSE
GUILDFORD
GU14TX
UNITED KINGDOM

Change

2.4. Click the Change button to display a list of shipping addresses that you can choose from, if any.

2.5. **Finishing Adding RFQ Details.** When you have completed the Tell us About this RFQ wizard you click the Next: Step 3 button:

Next: Step 3 - Choose suppliers to contact »

2.6. The details you have entered are validated and, if valid, saved and the Step 3 - RFQ:Choosing Suppliers to Contact page is displayed.

2.2.2.3.3 Step 3 - RFQ: Choosing Suppliers to Contact

Overview

In Step 3 of the Create New RFQ wizard you select the Suppliers you wish to send the RFQ to.

The following steps describe the Choose Suppliers to Contact wizard page:

1. **The RFQ : Choose Suppliers to Contact wizard page.** After you have finished Step 2 - Tell us About your RFQ the RFQ : Choose Suppliers to Contact wizard page is displayed:

Choose Suppliers

Pick the suppliers from whom you would like a quote from the list below by adding them to your list of suppliers to contact

Suppliers available to contact

[Browse by name](#)
[Find by category](#)

[0-9](#)
[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)

Sorry, but there were no supplier names found starting with 0-9 , please try another letter above.

Suppliers to contact

To add a supplier to this list find them on the left and click the "Add" link next to the supplier you are after

This RFQ will be sent to the suppliers you add to your "Suppliers to contact" list directly.

2. **Adding Suppliers to the RFQ.** To add a Supplier that is already on the system:

- 2.1. **Browse for a Supplier.** You can click the letter or number that your Supplier starts with in the Browse by Name tab. A list of Suppliers is displayed. Fore example:

Suppliers available to contact

[Browse by name](#)
[Find by category](#)

[0-9](#)
[A](#)
[B](#)
[C](#)
[D](#)
[E](#)
[F](#)
[G](#)
[H](#)
[I](#)
[J](#)
[K](#)
[L](#)
[M](#)
[N](#)
[O](#)
[P](#)
[Q](#)
[R](#)
[S](#)
[T](#)
[U](#)
[V](#)
[W](#)
[X](#)
[Y](#)
[Z](#)

Supplier Name	Vendor Number	Location	Add them?
Procsolve Supplier Support Ltd	978320999	London	Add »
PS Supplier Solutions	296887490	London	Add »

Click the Add link to add the Supplier. The Supplier is added to the list of Suppliers to Add:

Suppliers to contact

1. Procserve Supplier Support Ltd - [Remove](#)

To add a supplier to this list find them on the left and click the "Add" link next to the supplier you are after

2.2. **Find by Category.** You can also click the Find by Category tab. For example:

Suppliers available to contact

Browse by name Find by category

Show suppliers in: Vehicles (not Buses - se

Search

Supplier Name	Vendor Number	Location	Add them?
Lantern House School 002	999543888	Guildford	Add »

2.3. You locate the Category for your Supplier and click the Search button. Any Suppliers found are displayed below the Search button, as shown.

2.4. Click the Add link to add the Supplier to the list of Suppliers to Add.

2.5. **Manually Adding Suppliers to the RFQ.** If a Supplier has not already been entered on the system follow these steps:

2.6. You click the manually add their details link in the area shown in the following image:

Cannot find a particular supplier here?

If there is a supplier that you would like to send your RFQ to, but is not listed in our system, you can [manually add their details](#) *

* Please note that if you manually add a supplier to your list, you will also have to manually record their bid should they be chosen as the winner.

2.7. The Manually add a Supplier form is displayed:

Manually add a supplier

(Bold fields are required)

Supplier name:

Vendor code:

Supplier email address:

Supplier address:

Town/city:

Postcode:

2.8. Enter the details for the Supplier and click the Add button.

2.9. The details are validated and if valid the Supplier is added to the list of Suppliers to Add:

Suppliers to contact

1. Remove"/>
2. Remove"/>

To add a supplier to this list find them on the left and click the "Add" link next to the supplier you are after

3. **Removing Suppliers from the List of Suppliers to Contact.** To remove a Supplier from this list click the Remove link (see above image).

4. **Finishing Adding Suppliers.** When you have finished adding Suppliers click the Next: Step 4 link:

Next: Step 4 - Confirm details & send »

5. The system saves the Supplier list to you RFQ and the Step 4 - Confirm and Publish RFQ page is displayed.

2.2.2.3.4 Step 4 - Confirm and Publish RFQ

Overview

In Step 4 of the Create New RFQ wizard you will confirm and publish your RFQ. You can also go back the previous step if you wish to edit your RFQ.

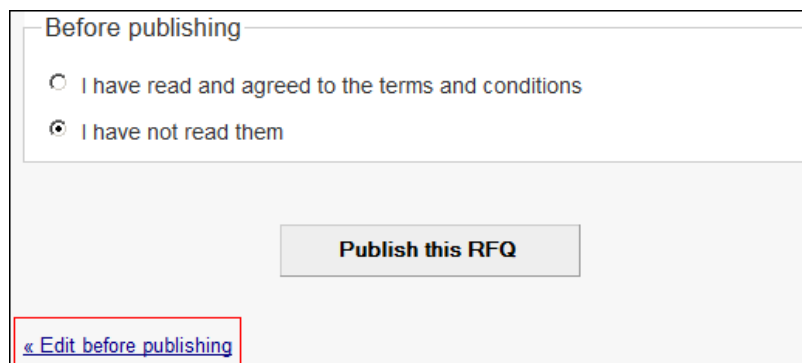
The Confirm and Publish RFQ Wizard Page

The following steps describe the Confirm and Publish wizard page:

1. After you have finished Step 3 - RFQ:Choosing Suppliers to Contact the Confirm and Publish wizard page is displayed:



2. **Checking RFQ Details.** The page shows the details that you entered in the previous steps of the wizard. You should check through the details and make sure they are correct. If you wish to make any changes you should click the Edit before Publishing link:



3. **RFQ Terms and Conditions.** When you are sure the RFQ is correct you should read the Terms and Conditions and if you agree with them "I have read an agreed" check the box:

Is this correct?

If these details are correct please confirm that you have read the [terms and conditions](#) below and click the "Publish this RFQ" button.

Before publishing

☒ I have read and agreed to the terms and conditions

☐ I have not read them

[« Edit before publishing](#)

[Publish this RFQ](#)

4. **Confirming Details and Publishing the RFQ.** Click the Publish the RFQ button to publish the RFQ.

5. The RFQ is displayed in View Details page with a confirm message:

RFQ Management - view RFQ

[«Back to RFQ overview](#)

[Re-issue this RFQ](#)[Withdraw this RFQ](#)

Success! This RFQ has been published, and the suppliers listed below have been sent copies.

RFQ00000001 - Paper04020209 - Open

Description	Must be recycled
Your reference	RFQ00000001
Expiry date	15 February 2009
Sealed bids?	No
Shipping address	LANTERN HOUSE GUILDFORD GU14TX UNITED KINGDOM
Number of items	1 (show all)
Suppliers Summary	2 suppliers contacted directly (show all) . No suppliers contacted manually.

Bids (0)

No bid received yet

6. **What's Next?** You can return to The RFQ Overview Page (click the link shown in the top left of the above image) to check the status of your RFQ in the open RFQ list. You can use The RFQ Details Page to re-assign or withdraw the RFQ.

2.2.2.4 The Schools RFQ Details Page

Overview

You use the RFQ details page to view your RFQs and, where appropriate, perform further actions. For example you may be able to re-issue or withdraw an open RFQ.

The RFQ Details Page. The following image shows a typical RFQ Details page:

RFQ Management - view RFQ

[«Back to RFQ overview](#)

Re-issue this RFQ **Withdraw this RFQ**

RFQ00000006 - Paper04020209 - Open

Description	Must be recycled
Your reference	RFQ00000006
Expiry date	15 February 2009
Sealed bids?	No
Shipping address	123 Buckingham Palace Road London SW1W 9SR UNITED KINGDOM
Number of items	1 (show all)
Suppliers Summary	2 suppliers contacted directly (show all). No suppliers contacted manually.

Bids (0)

No bid received yet

The following list describes the RFQ Details page:

- **Return to RFQ Overview Link.** Click this link to return to the The RFQ Overview Page.

- **Re-Issuing the RFQ.** **Re-issue this RFQ** Click this button to re-issue this RFQ. The system will display the Step 1 - Adding RFQ Items page for this RFQ.

- **Withdrawing the RFQ.** **Withdraw this RFQ** Click this link to withdraw the RFQ.
Note: This option is only available for open RFQs.

A message is displayed:

RFQ Management - withdraw RFQ

Please confirm that you would like to withdraw this RFQ. Doing so will result in all of the suppliers below being contacted to let them know that this RFQ no is longer valid.

Confirm withdrawal

Cancel

- **Show All Items Link.** You can click this link to view item details:

Items (1) Collapse						
Item name	Item description	Quantity	Unit of measure	Target price (GBP)	Total (GBP)	Attachment
Paper Pack	A4 80gsm recycled	100.00	Boxes	4.99	499.00	
Total (without tax):					499.00	

Click the Collapse link to hide the item details.

- **Show Supplier Link.** Click this link to view a list of Suppliers:

Suppliers contacted about this RFQ	
Name	Location
Procserve Supplier Support Ltd	London
PS Supplier Solutions	London

- **Working with Bids.** Where one or more bids have been received they are listed below the details area:

Bids (1)					
Bids in green are the most recent bids from each supplier.					
Supplier	Location	Category	Quote amount (GBP)	Date received	Quote reference number
DCSF Test Supplier	Anytown	N/A	1,222.00	26 June 2008 at 10:37	RFQ00000190

You can view a bid details and notify a successful bidder:

- **Bid Details.** Click the Supplier link to view the Bidder details:

Bidder details									
Supplier		Contact details			Category		Number of quotes submitted		
DCSF Test Supplier		Email: paul@pserve.com Telephone: 02076176333			N/A		1		
Most recent Bid Detail - (received 26 June 2008 at 10:37)									
Item	Bidders description	Manufacturer (part ID)	Comments	Quantity	Item Price Pre Tax (GBP)	Item price (GBP)	Total tax (GBP)	Total Price (GBP)	Attachment
Music System MP3	Stereo music system with MP3 playback and doly 5.1 sound	0		3.00 Each	300.00	300.00	0.00 (0.00%)	900.00	
Turntable	Pro-ject Debut Record Player	0		1.00 Each	130.00	130.00	0.00 (0.00%)	130.00	
2 Way Power Supply		0		1.00 Each	10.00	10.00	0.00 (0.00%)	10.00	
Total excluding tax:								1,222.00	
Total including tax:								1,222.00	

- Read and check the details and perform the following tasks:

- Selecting a Bid as the Winner.** If you choose to select the Supplier as the winning bidder you must add a reason for selecting the bid as shown, for example:

Select this bid as the winner

(Bold fields are required)

Why have you chosen this as the winning bid?*

Best Price, quickest delivery

Award as the winning bid

Click the Award as the winning bid button. The award is accepted and the RFQ Details page displayed with the bid now displayed in Yellow:

Bids (1)						
Supplier	Location	Category	Quote amount (GBP)	Date received	Quote reference number	
DCSF Test Supplier	Anytown	N/A	1,222.00	26 June 2008 at 10:37	RFQ00000190	Chosen as winner on the 15 February 2009 Unaward (Moves this RFQ into your "Closed RFQs, waiting for your action" list) Chosen because: Best Price, quickest delivery

- Notifying Unsuccessful Winners.** [Email suppliers who have not won](#) When a bid has been accepted the email Suppliers who have not won button is displayed.

Click this link to display a form with which you can notify Suppliers with:

To:	com.george@procserve.com
Subject:	
<input type="button" value="Send"/>	

Enter a subject and a message in the relevant text areas. Click the Send button.

The RFQ Details page is displayed and the following message is displayed :

Thank you! Your email has been sent to the suppliers who did not win this RFQ.

- **Revoking a Winning Bid.** You can unaward (revoke) a winning bid. In the RFQ Details page click the Unaward link:

Supplier	Location	Category	Quote amount (GBP)	Date received	Quote reference number	
DCSF Test Supplier	Anytown	N/A	1,222.00	26 June 2008 at 10:37	RFQ00000190	Chosen as winner on the 15 February 2009 Unaward (Moves this RFQ into your "Closed RFQs, waiting for your action" list) Chosen because: Best Price, quickest delivery

The following message appears in the area above the RFQ details:

Please confirm that you would like to unaward this RFQ. Doing so will result in moving this RFQ into your "Closed RFQs, waiting for your action" list.

Unaward? Click the Confirm Unaward button to unaward the bid.
A message is displayed:

This RFQ has been unawarded.

Cancel? Click the Cancel button to cancel the unaward.

- **Closing the RFQ with no Winner.** For closed RFQs only. After bids have been received you can close an RFQ with no winner. For example:

RFQ00000006 - Paper04020209 - Closed and waiting for your action

Please choose a winner from the bids below, or choose to [Close this RFQ with no winner](#)

When you click the link the following prompt is displayed:

Tell us why you are ending this RFQ with no winner

Explanation

New RFQ issued with
new items

You can only enter up to 250 characters

Close with no winner

Cancel

RFQ00000006 - Paper04020209 - Closed and waiting for your action

Click the Close with no winner button to close the RFQ with no winner.

Click the Cancel button to cancel the close RFQ action.

2.2.3 Schools Free Text Requisitions

2.2.3.1 Schools Free Text Requisitions Overview

This guides you through the process of managing Free Text Requisitions (FTR).

The Free Text Requisitions feature within the system allows you to:

- **View Existing FTRs.** You can view a list of submitted FTRs, draft FTRs and FTR templates. You can view further details of FTRs or work with draft FTR and FTR templates from the Free Text Requisitions Overview Page.
- **View FTR Details.** You can view FTR details and submit or delete draft FTRs from the Free Text Requisitions Overview Page.
- **Create FTRs.** You can create FTRs.
- **FTR Templates.** FTR Templates are used to enable easy creation of FTRs. You can view, use or create existing FTR templates in the Free Text Requisitions Overview Page.

2.2.3.2 Schools Free Text Requisitions Overview Page

Overview

You use the Free Text Requisition Management Overview page to view and work with FTRs.

Locating the FTR Management Overview Page. The following steps describes how you locate and use the Free Text Requisition Overview page:

1. Navigate to **Buyer Menu >> Free Text Requisitions**
2. **Creating Free Text Requisitions.** Click Create New Requisition to create a new FTR.
3. **Working with Existing FTRs.** The Free Text Management Overview page is displayed:

Free text requisition management - Overview			
Last (1) requisitions submitted			
Requisition ID	Supplier name	Submitted date	Number of items
#8	ProcServe	16 February 2009	1
Draft requisitions (1) - yet to be submitted			
Draft requisition ID	Supplier name	Creation date	Number of items
I	ProcServe	16 February 2009	2
Free text requisition templates (1 of 1)			
Add new template			
Template name / ID	Creation date	Number of items	
Art Materials	16 February 2009	3	

You use the Free Text Requisition Overview page to view and work with your requisitions.

4. The following list describes the Free Text Requisition Overview page:

- **Last Requisitions Submitted.** You can view a summary list of the FTRs you have submitted. You can click the Requisitions ID for a FTR to view further details.
- **Draft Requisitions.** You can view a summary list of the draft FTRs you have created. You can click the Requisitions ID for a draft FTR to view further details and edit or delete the draft.
- **FTR Templates.** You can create FTR templates that allow you to re-use the same details. For example: if you have a regular requirement. Click the Template Name field to edit, delete or use FTR templates. Click the Add New Template link to create a new template.

2.2.3.3 Creating an Schools FTR

Overview

This guides you through the process of creating Free Text Requisitions (FTR).

There are three steps: adding the items, selecting a Supplier and confirming the details.

Locating the Create FTR Wizard. The following steps describe how you locate the Create FTR page and create a Free Text Requisition:

1. Navigate to **Buyer Menu >> Free Text Requisitions >> Create New Requisitions:**
2. **Step 1 - Adding Items to an FTR.** Step 1 of the Create FTR wizard is displayed:

The screenshot shows a web interface for creating a requisition. At the top, a header bar contains the title 'Free text requisition management - Create a requisition' and three steps: 'STEP 1 - ADD ITEMS' (highlighted), 'STEP 2 - SELECT SUPPLIER', and 'STEP 3 - CONFIRM DETAILS AND SUBMIT'. Below the header, the section is titled 'Step 1 - Add Items'. A message states: 'Please add the items you'd like to order using the form below. Once you have added all the items, click the "Next: Step 2" button which will appear above.' The form is titled 'Add a new item' and includes a note '(Bold fields are required)'. It contains five input fields: 'Item name*' (text), 'Item description*' (text), 'Quantity*' (text with '1' entered), 'Unit of measure*' (dropdown menu with 'Each' selected), and 'Price £' (text with '0.0' entered). An 'Add item' button is located at the bottom of the form.

3. **Item Details.** The following details are required for each item:
 - 3.1. **Item Name.** You must enter a name for each item.
 - 3.2. **Item Description.** You must add a description for each item.
 - 3.3. **Quantity.** You must enter a quantity you wish to be quoted on for each item.
 - 3.4. **Unit of Measure.** You can select an optional unit of measure from the drop down list.
 - 3.5. **Price (GPB).** The price you wish to pay in your organisation's default currency.
4. **Add Item Button.** When you have added the first item you click this button to validate and, if valid, save the first item to the FTR. If you make a mistake you can edit the line by clicking on the edit button or remove it all together by clicking on the remove button.

Item name	Item Description	Quantity	Price	
Oil Paints	FF1 Oil Paints	1 Each	£20.00	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
			Total: £20.00	

Add a new item

(Bold fields are required)

Item name*

Item description*

Quantity*

Unit of measure*

Price £

5. You can continue to add items to the FTR. When you have added all items you click the Next: Step 2 button:

Next: Step 2 - Select supplier »

6. **Step 2 - Selecting a Supplier for the FTR.** The Next: Step 2 - Select Supplier page is displayed:

Free text requisition management - Create a requisition

STEP 1 - ADD ITEMS **STEP 2 - SELECT SUPPLIER** STEP 3 - CONFIRM DETAILS AND SUBMIT

Step 2 - Select supplier

Find a supplier to requisition from

Search For

7. Enter a Search string in the Search For box and click the Search button. If your search was successful then one or more Suppliers is displayed, for example:

Results for PROC (1)

Supplier name	Location	Select company to requisition from
ProcServe	123 Buckingham Palace Road London UNITED KINGDOM SW1W 9SR	<input type="button" value="Select supplier »"/>

Can't find a particular supplier here?

If there is a supplier that you would like to send your FTR to, but is not listed in our system, you can [manually add suppliers](#)

- 7.1. **Located Supplier?** If you have located the Supplier for your FTR then click the Select Supplier

button for that Supplier. The FTR Confirmation page will be displayed.

7.2. **Supplier Not Found?** If you wish to add Supplier details to the system manually click the Manually Add Suppliers link.

8. **Step 2 - Manually Adding Suppliers to your FTR.** When you click the Manually Add Suppliers link, the following form is displayed below the Search box:

Can't find a particular supplier here?

If there is a supplier that you would like to send your FTR to, but is not listed in our system, you can manually add suppliers

Manually add a supplier

Supplier name: Artistic Materials Ltd

Supplier vendor code: 901909109

Supplier email address: Artie@AML.co.uk

Supplier address: 47 Monk Road

Town: Milton Keynes

Post code: MN42 9TY

Add

You enter these details:

8.1. **Supplier Name.** You must enter a name for the Supplier.

8.2. **Supplier Vendor Code.** You must enter a code for the Supplier

8.3. **Supplier email Address.** You must enter a valid email address for the Supplier.

8.4. **Supplier Address.** If you wish you can enter the Supplier's address.

8.5. **Town.** If you wish you can enter the Supplier's town.

8.6. **Post Code.** If you wish you can enter the Supplier's post code.

9. Click the Add button when you have entered the require details.

10. If the details are valid they will be saved to the system and the FTR Confirmation page displayed.

11. **Step3 - FTR Confirmation Page.** When you have entered items and selected a Supplier for your FTR the FTR Confirmation page is displayed:

Confirmation Details

Request

Creation date	16 February 2009
Number of Items	1

Items List

Item name	Item Description	Quantity	Price
Oil Paints	FF1 Oil Paints	1 Each	£20.00
			Total: £20.00

Supplier

Supplier name	Location
Artistic Materials Ltd	47 Monk Road Artie@AML.co.uk Milton Keynes MK42 9TY

Is this correct?

Submit this requisition

Save as draft

[« Edit before publishing](#)

12. You can view details and perform the following tasks:

12.1. **Edit Before Publishing Link.** Click this link to return to the FTR Step 1 to check or amend details.

Warning. You will need to add the Supplier details again if you choose this option.

12.2. **Submit This Requisition Button.** Click this button to submit the requisition. The FTR is added to the Submitted list in the Free Text Requisitions Overview Page.

12.3. **Save as Draft Button.** Click this button to save a draft of your FTR.

2.2.3.4 Schools FTR Details Page

Overview

You use the FTR details page to view your FTRs and, where appropriate, perform further actions. The FTR details page is displayed with different options depending on the status of the FTR (e.g. draft or submitted).

Draft FTR Details Page. The following image shows a typical FTR Details page for a draft FTR:

Free text requisition management - View requisition

[« Back to overview](#) [Edit this draft](#) [Delete](#)

Requisition #10 DRAFT

This requisition has not been submitted yet. To submit it click the "Edit this draft" button above.

Creation date	16 February 2009
Number of items	1

Items List

Item name	Item Description	Quantity	Price
Oil Paints	FF1 Oil Paints	1 Each	£20.00
			Total: £20.00

Supplier

Supplier name	Location
Artistic Materials Ltd	47 Monk Road Artie@AML.co.uk Milton Keynes MK42 9TY

The following list describes the draft FTR Details page:

- **Return to FTR Overview.** To return to the FTR overview page navigate to **Buyer Menu >> Free Text Requisitions**.
- **Edit this Draft Button.** Click this button to open the draft at the first step of the Create FTR wizard. Existing items are displayed. You can add items and Suppliers to the draft.
- **Delete FTR Button.** Click this button to display the following prompt:

Please confirm that you would like to delete this Draft requisition. Doing so will remove it from your Draft requisition list permanently.

[Confirm Delete](#) [Cancel](#)

Click the Cancel button to cancel the deletion and return to the FTR Details page.
Click the Confirm button to delete the draft FTR and return to the Free Text Requisitions Overview Page

- **FTR Details.** The remainder of the page shows a summary of the FTR. These fields are described in Submitted FTR Details Page below.

Submitted FTR Details Page. The following image shows a typical FTR Details page for a submitted FTR:

Free text requisition management - View requisition

[« Back to overview](#)

Requisition #9

Creation date	16 February 2009
Number of items	3

Items List

Item name	Item Description	Quantity	Price
Erasers	HY121	5 Each	£0.26
Paper 200gsm	High Quality	5 Boxes	£10.00
Pencils	Assorted - Soft	10 Boxes	£4.00
Total:			£91.30

Supplier

Supplier name	Location
ProcServe	123 Buckingham Palace Road London UNITED KINGDOM SW1W 9SR

The following list describes the submitted FTR Details page:

- **Return to FTR Overview.** To return to the FTR overview page navigate to the **Buyer Menu >> Free Text Requisitions**.
- **Requisition Details.** This area shows the number of items and creation date for the FTR.
- **Items List.** This list shows a summary description of the items on the FTR and a total cost.
- **Supplier Details.** This area displays details for the Supplier.

2.2.3.5 Working with Schools FTR Templates

Overview

This guides you through the process of creating, using and editing Free Text Requisitions (FTR) templates.

Locating the FTR Template List. The following steps describes how you locate and use the FTR Template page:

1. Navigate to **Buyer Menu >> Free Text Requisitions**. The following image shows the FTR templates area:

Free text requisition templates (1 of 1)		
Add new template		
Template name / ID	Creation date	Number of items
Art Materials	16 February 2009	3

2. The Template list is located towards the bottom of the Free Text Requisitions Overview Page.

The following list describes what you can do from here:

- 2.1. **Edit or use Template.** Click the Template Name/ID link for the relevant FTR to view, edit or use the FTR.
- 2.2. **Add New Template.** Click the Add New Template link to add a new template.
3. **FTR View/Edit/Submit/Delete Page.** When you click on an FTR template the View Requisition Template page is displayed:

Free text requisition management - View requisition template

[« Back to overview](#)

Art Materials

Creation date	16 February 2009
Number of items	3

Items List

Item name	Item Description	Quantity	Price
Pencils	Assorted - Soft	10 Boxes	£4.00
Paper 200gsm	High Quality	5 Boxes	£10.00
Erasers	HY121	5 Each	£0.26
Total:			£91.30

Supplier

Supplier name	Location
ProcServe	123 Buckingham Palace Road London UNITED KINGDOM SW1W 9SR

You can view the Details for the FTR Template. The following options are available:

- 3.1. **Back to Overview Link.** You can click this link to return to the Free Text Requisitions Overview

Page.

- 3.2. **Submit this as a New Requisition Button.** Click this button if you wish to use this template to create a new requisition. If the FTR submission was successful a message is displayed:

Success. You have submitted the requisition detailed below. You can view this order again in your "Submitted requisitions" table on the [Free text requisition overview page](#)

Click the Free Text Requisition Overview link to return to the Free Text Requisitions Overview Page.

- 3.3. **Edit this Template Button.** Click this link to add further items to the template and change the Supplier:

[Next: Step 2 - Select supplier »](#)

Step 1 - Name & Add Items

Item name	Item Description	Quantity	Price
Erasers	HY121	5 Each	£0.26
Paper 200gsm	High Quality	5 Boxes	£10.00
Pencils	Assorted - Soft	10 Boxes	£4.00
			Total: £91.30

Please name this template (this is the name you will have to use to find it again) and add the items you'd like to order using the form below. Once you have added all the items, click the "Next: Step 2" button which will appear above.

Name this template

Template Name*

Add a new item

(Bold fields are required)

Item name*

Item description*

Quantity*

Unit of measure

Price £

Add item

You can change the Template name and add further items. This procedure and above page is described in Create FTR Template.

- 3.4. **Delete this template.** Click this link to delete the FTR Template. Confirm that you want to delete the FTR template by clicking on the Confirm deletion button or click cancel if you do not want to confirm the deletion.

Are you sure you want to delete this free text requisition template? Doing so will remove it from your requisition list permanently.

Confirm deletion

Cancel

4. **Create FTR Template Page.** When you click the Add New Template link in the Free Text Requisitions Overview Page the first step of the Add New Template wizard is displayed:

Free text requisition management - Create a template

STEP 1 - NAME & ADD ITEMSSTEP 2 - SELECT SUPPLIERSTEP 3 - CONFIRM DETAILS AND SAVE

Step 1 - Name & Add Items

Please name this template (this is the name you will have to use to find it again) and add the items you'd like to order using the form below. Once you have added all the items, click the "Next: Step 2" button which will appear above.

Name this template

Template Name*

Add a new item

(Bold fields are required)

Item name*

Item description*

Quantity* 1

Unit of measure Each

Price £ 0.0

Add item

The following list describes the Add Item step:

- 4.1. **Template Name.** Enter a name for the template.
5. **Item Details.** The following details are required for each item:
 - 5.1. **Item Name.** You must enter a name for each item.
 - 5.2. **Item Description.** You must add a description for each item.
 - 5.3. **Quantity.** You must enter a quantity for each item.
 - 5.4. **Unit of Measure.** You must select an optional unit of measure from the drop down.
 - 5.5. **Price .** The price you wish to pay in your organisation's default currency.
6. **Add Item Button.** When you have added the first item you click this button to validate and, if valid, save the first item to the FTR Template, for example:

Next: Step 2 - Select supplier »

Step 1 - Name & Add Items

Item name	Item Description	Quantity	Price
Paint Boxes	Children Paint Boxes	10 Each	£1.50
			Total: £15.00

Please name this template (this is the name you will have to use to find it again) and add the items you'd like to order using the form below. Once you have added all the items, click the "Next: Step 2" button which will appear above.

Name this template

Template Name*

Add a new item

(Bold fields are required)

7. You can continue to add items to the FTR template. When you have added all items you click the Next: Step 2 button: **Next: Step 2 - Select supplier »**

8. **Select A Supplier for the FTR Template.** The Next: Step 2 - Select Supplier page is displayed:

Free text requisition management - Create a requisition

STEP 1 - ADD ITEMS STEP 2 - SELECT SUPPLIER STEP 3 - CONFIRM DETAILS AND SUBMIT

Step 2 - Select supplier

Find a supplier to requisition from

Search For

Search

9. Enter a Search string in the Search For box and click the Search button. If your search was successful then one or more Suppliers is displayed, for example:

Results for PROC (1)

Supplier name	Location	Select company to requisition from
ProcServe	123 Buckingham Palace Road London UNITED KINGDOM SW1W 9SR	Select supplier »

Can't find a particular supplier here?

If there is a supplier that you would like to send your FTR to, but is not listed in our system, you can [manually add suppliers](#)

9.1. **Located Supplier?** If you have located the Supplier for your FTR template then click the Select Supplier button for that Supplier. The FTR Confirmation page will be displayed.

9.2. **Supplier Not Found?** If you wish to add Supplier details to the system manually click the Manually Add Suppliers link.

10. **Manually Adding Suppliers to your FTR Template.** When you click the Manually Add Suppliers link, the following form is displayed below the Search box:

Can't find a particular supplier here?

If there is a supplier that you would like to send your FTR to, but is not listed in our system, you can manually add suppliers

Manually add a supplier

Supplier name:

Supplier vendor code:

Supplier email address:

Supplier address:

Town:

Post code:

You enter these details:

10.1. **Supplier Name.** You must enter a name for the Supplier.

10.2. **Supplier Vendor Code.** You must enter a code for the Supplier

10.3. **Supplier email Address.** You must enter a valid email address for the Supplier.

10.4. **Supplier Address.** If you wish you can enter the Supplier's address.

10.5. **Town.** If you wish you can enter the Supplier's town.

10.6. **Post Code.** If you wish you can enter the Supplier's post code.

11. Click the Add button when you have entered the require details.

12. If the details are valid they will be saved to the system and the FTR Confirmation page displayed.

13. **FTR Confirmation Page.** When you have entered items and selected a Supplier for your FTR template the FTR Confirmation page is displayed:

Confirmation Details

Drawing Materials

Creation date	16 February 2009
Number of items	1

Items List

Item name	Item Description	Quantity	Price
Paint Boxes	Children Paint Boxes	10 Each	£1.50
			Total: £15.00

Supplier

Supplier name	Location
123 Buckingham Palace Road London UNITED KINGDOM SW1W 9SR	

Is this correct?

14. You can view details and perform the following tasks:

14.1. **Edit Before Saving Link.** Click this link to return to the Create FTR Template Step 1 to check or amend details.

Warning. You will need to add the Supplier details again if you choose this option.

14.2. **Save Template Button.** Click this button to save the FTR template. The FTR is added to the FTR Template list in the Free Text Requisitions Overview Page.

2.2.4 My Transactions

2.2.4.1 Using My Transactions

Overview

You can view your transactions such as orders and drill down to view individual transaction details. There is a transaction list for registered Suppliers and one for unknown Suppliers.

Transactions List.

1. Navigate Buyer Menu >> Transactions

2. The Transaction page is displayed:

This page contains two lists (My Transactions for registered suppliers and My Transactions for unknown suppliers):

My Transactions for registered suppliers:

The image below shows a list of transactions from Suppliers registered on the system.

My Transactions for registered suppliers		
[First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]		
Order ID	Supplier name	Order date
OPEN000048	MegaHanet	09 September 2008
OPEN000049	Secon Co	09 September 2008
OPEN000051	MegaHanet	09 September 2008
OPEN000050	Secon Co	09 September 2008
BANK006872	Secon Co	04 September 2008
OPEN000047	Secon Co	02 September 2008
OPEN000046	MegaHanet	07 August 2008
OPEN000045	Secon Co	06 August 2008
OPEN000044	MegaHanet	06 August 2008
OPEN000043	Secon Co	06 August 2008

You can click on the Order ID for a transaction to view a details summary.

My Transactions for unknown suppliers:

The image below shows a list of transactions from Suppliers who are not yet registered on the system.

My Transactions for unknown suppliers		
[First/Prev] 1, 2, 3, 4 [Next/Last]		
Order ID	Supplier name	Order date
OPEN000057	HperGlobalMeganet	03 October 2008
JPG001157	secon	27 June 2008
XML000002	HperGlobalMeganet	05 June 2008
JPG001145	secon	04 June 2008
JPG001128	Secondary Colours	11 May 2008
JPG001124	Secondary Colours	07 May 2008
JPG001123	Secondary Colours	07 May 2008
JPG001123	Secondary Colours	07 May 2008
JPG001115	HperGlobalMeganet	21 April 2008
JPG001114	Secondary Colours	21 April 2008
Please note that if you placed an order for items from more than one supplier, you will see an order appear in the table above for each supplier that you ordered from. This is so each supplier can be contacted and ordered from individually.		

You can click on the Order ID for a transaction to view a details summary.

3. Viewing Transaction Details.

Click the Order ID in a transaction list to view transaction details, for example:

Purchase orders - Order ID OPEN000048				
Order date: September 9, 2008				
Delivery address:				
ProcServe Test School [123 Buckingham Palace Road, London] SW1W 9SR				
Items included in this order				
Delivery date	Item description	Unit price	Quantity	Total
September 9, 2008	Football	GBP 10.00	10 EA	GBP 100.00
Total:				GBP 100.00
Please note that if you placed an order for items from more than one supplier, you will see a transaction page like this for each supplier on your original list. This is because your original list of items has to be split out into several purchase orders so that each supplier can be contacted and ordered from separately.				

To return to the Transaction list navigate to the Buyer Menu >> Transactions.

2.2.5 Service Requests

2.2.5.1 Service Requests Overview

Service Requests allow you to request the ProcServe service desk to perform the following tasks:

- **Delete User.** You can deactivate a user.
- **Request Supplier.** You can ask us to make a supplier available to you.
- **Request Catalogue.** You can ask us to make a catalogue available to you.
- **Other Request.** Use this form to make any other request related to operations of ProcServe.

2.2.5.2 Deleting a User

Overview

You can delete a user if you have the role of Authoriser.

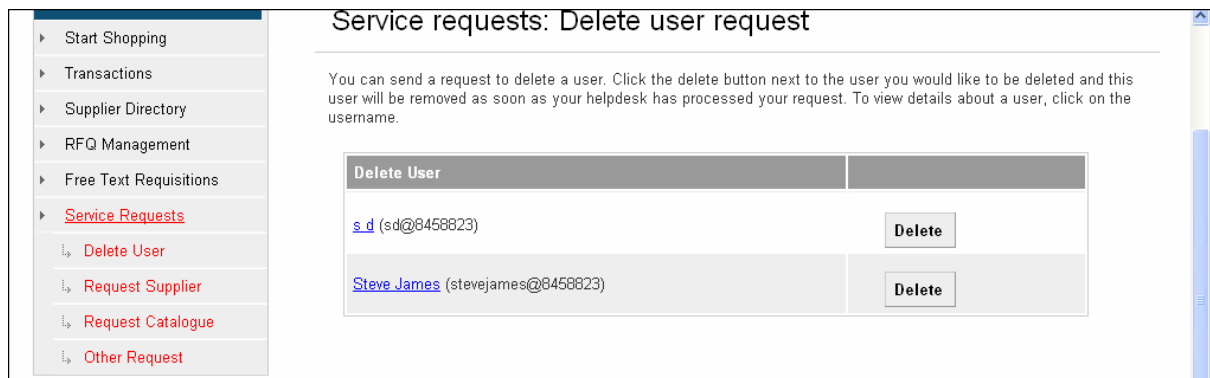
Deleting a User

1. Navigate to Service Requests



2. Select 'Delete User'

3. Next to the user you wish to delete, click the 'Delete' button



4. You will be asked to confirm you wish to delete the user and give a reason why.

Service Requests

BUYER MENU

Start Shopping

Transactions

Supplier Directory

RFQ Management

Free Text Requisitions

Service Requests

Delete User

Request Supplier

Request Catalogue

Other Request

Service requests: Delete user request

You can send a request to delete a user. Click the delete button next to the user you would like to be deleted and this user will be removed as soon as your helpdesk has processed your request. To view details about a user, click on the username.

Confirm delete request

Please say why you'd like us to delete this person

Has left our company
07/09/09

Confirm deleting this user

Cancel

Deleting stevejames@6458823 will result in them not being able to access the marketplace any more.

5. You will be shown a user deletion confirmation screen

BUYER MENU

Start Shopping

Transactions

Supplier Directory

RFQ Management

Free Text Requisitions

Service Requests

Delete User

Service requests: Delete user request

Thank you! Your request for *Steve James* to be deleted has been processed and they will no longer be able to use their account.

You can send a request to delete a user. Click the delete button next to the user you would like to be deleted and this user will be removed as soon as your helpdesk has processed your request. To view details about a user, click on the username.

2.2.5.3 Request Supplier Services Request

Overview

You can request that we create a new Supplier for you to trade with.

Note: You will require at least the following information:

- Supplier name.
- Contact name.
- Email address.
- Full address including post code.
- Telephone number.

You could also obtain the Supplier's DUNS number.

Locating the Supplier Services Request Form. The following steps describe how to access and use the Supplier Request Form:

1. Navigate **Buyer Menu >> Service Requests >> Request Supplier.**
2. The Service Request : request for a Supplier page is displayed:

Service requests: request for a supplier

Submit the new supplier's details in the form below and a request will be e-mailed to your helpdesk who will set about adding the supplier for you.

Bold fields are required

Supplier information

Supplier name*
This must be a registered supplier

DUNS number

Contact name*
Name of main contact at supplier

Contact information for supplier

Email address*

Address line 1*

Address line 2


Town/city*

County

Postcode*

Telephone number*
e.g. +44 (0) 123 456 7890

3. **Completing and Sending the Supplier Request Form.** The following list describes the fields in this request form:
 - **Supplier Name.** You must supply a name for the Supplier.
 - **DUNS.** You can enter the Supplier's DUNS number here.

- **Contact Name.** You must supply a name of a contact within the Supplier.
 - **Email Address.** You must supply a valid email address for the contact.
 - **Address Line 1.** You must supply the first line of the Supplier's address.
 - **Address Line 2.** You can enter the second line of the Supplier's address.
 - **Town/City.** You must supply the name of the Supplier's Town or City.
 - **County.** You can enter the Supplier's county.
 - **Postcode.** You must supply the Supplier's postal code.
 - **Telephone Number.** You must supply the telephone number for the Supplier contact.
4. **Save Details.** When you have completed the form click the Send Request button: 

2.2.5.4 Request Catalogue Services Request

Overview

You can request access to an existing catalogue.

Note: You will require at least the following information:

- **Suppliers Name.**
- **Products Description.**

Locating the Catalogue Request Form. The following steps describe how to access and use the Catalogue Request Form:

1. Navigate to **Buyer Menu >> Service Requests >> Request Catalogue:**
2. The Service Request : request for a catalogue page is displayed:

Service requests: request for a catalogue

To request access to an existing catalogue, please provide details of the catalogue in the form below. The new catalogue will be added as soon as your helpdesk has received and processed your request.

Bold fields are required

Catalogue information

Supplier name*
This must be a registered supplier.

Products description*

Other details
Please enter additional information about the catalogue.

Send request

3. **Completing and Sending the Form.** The following list describes the fields in this request form:

- **Products Description.** Enter a description for the catalogue.
- **Other Details.** You can enter further details that may help describe for the catalogue and it's contents.

4. **Save Details.** When you have completed the form click the Send Request button:

Send request

2.2.5.5 Other Services Request

Overview

You can request another service.

Locating the Other Request Form. The following steps describe how you locate and use the Other Request form:

1. Navigate to **Buyer Menu >> Service Requests >> Other Services Request**.
2. The Service Request : general request page is displayed:

Service requests: general request

Submit the details of your request in the comments box below. Your request will then be e-mailed to your helpdesk.

Request

Details

Send request

3. **Completing and Sending the Form.** The following list describes the fields in this request form:

- **Details.** Enter the details of your request.

- **Save Details.** When you have completed the form click the Send Request button:

Send request

2.3 Admin Menu

2.3.1 Schools User Management

2.3.1.1 User Management Overview

Overview

This describes user types and what they can do and provides links to related topics.

Basic User Details

The following list describes where to find user task instructions:

Disabling Users	Users can be deleted by an Authoriser
Adding a User	Additional users can be added by an Authoriser

The following describes each buyer type (some of these might not be applicable to your organisation):

Purchaser	Buyer who is allowed access to services they need to purchase items.
Authoriser	Buyer who can only access services they need to authorise purchasing. An Authoriser can also add and delete users.

2.3.1.2 Adding a User

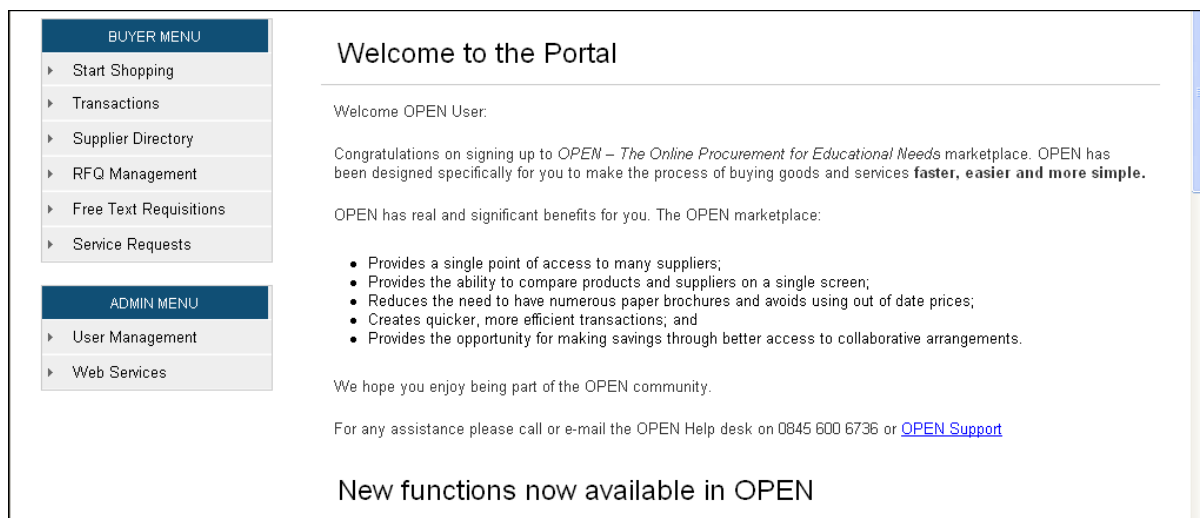
Overview

You can add a new user to your organisation if you have the role of Authoriser.

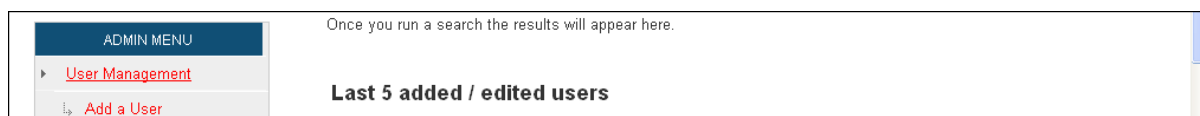
Adding a New User

The following steps will show you how to navigate to the User Management page and add new users.

1. Navigate >> User Management >> Add a User:



2. Select 'Add a User':



3. Complete all the fields:

The screenshot shows a web application interface for adding a new user. On the left is a sidebar menu with options: Transactions, Supplier Directory, RFQ Management, Free Text Requisitions, Service Requests, ADMIN MENU, User Management (highlighted), Add a User, and Web Services. The main content area contains a form with the following fields:

- Title: Mr (dropdown)
- First name*: (text input)
- Last name*: (text input)
- Username: This will be generated by the system
- Email address*: (text input)
- Confirm Email address*: (text input)
- Organisation: PServe Test School 300
- Default address*: 123 Buckingham Palace Road, SW1W 9SR (dropdown)
- Telephone number: (text input)
- Fax number: (text input)
- Preferred language: English (UK) (dropdown)
- Role*:
 - ☐ Authoriser
 - ☐ Purchaser
- Data Feed(s):
 - ☐ Welcome message
 - ☐ Message Of The day
 - ☐ News

Note: Email address must be unique for each user.

Tip: Review the types of role required in the 'User Manager Overview' to decide which role should give a user.

4. When complete click 'Save' at the bottom of the screen:

You will be shown the success notification as shown below:

The screenshot shows the 'User management - view User' page. The sidebar menu is similar to the previous one, but with 'User Management' highlighted under the 'ADMIN MENU'. The main content area has a title 'User management - view User' and a '< Back' link. A 'Success! You have added the new user shown below.' message is displayed in a pink box. Below this, the user's profile is shown: 'Mr Steve James' with a status of 'Active'. There is an 'Edit this profile' button in the top right corner.

5. The new user has been created:

Log in details will be sent to the email account specified for that user.

2.3.1.3 Viewing or Changing Basic User Details

Overview

If you are an Authoriser, you can use the User Management feature to view or change basic details for the users in your organisation.

You can change address and contact details, change the user role type (e.g. Purchaser or Authoriser) or update the user's classification views.

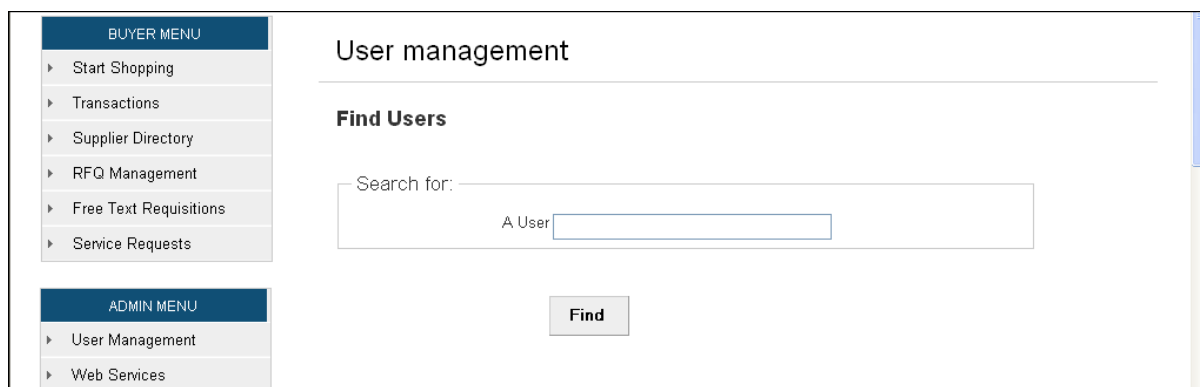
Note: For any other changes you need to contact the ProcServe service desk.

Locating a User Account

The following steps describe how you access and use the user management feature:

1. Navigate Admin Menu >> User Management menu option.

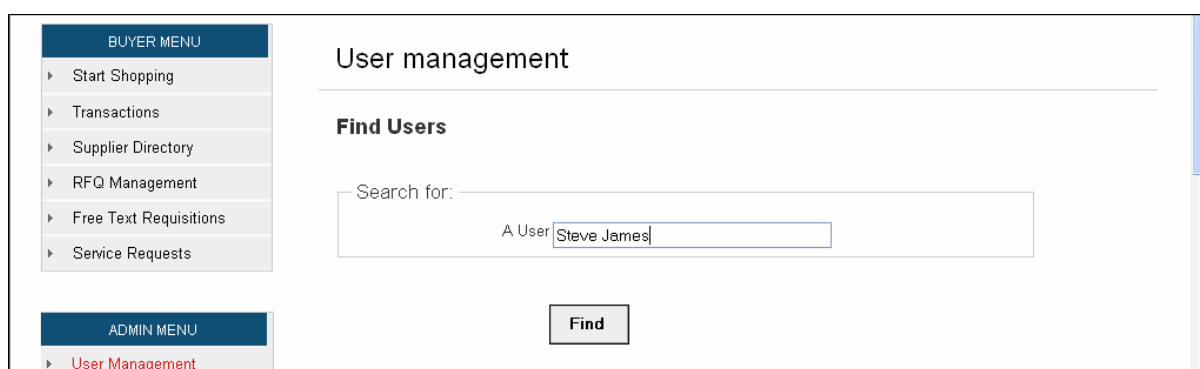
2. The Find Users page is displayed:



The screenshot shows the 'User management' interface. On the left is a sidebar with two menu sections: 'BUYER MENU' containing 'Start Shopping', 'Transactions', 'Supplier Directory', 'RFQ Management', 'Free Text Requisitions', and 'Service Requests'; and 'ADMIN MENU' containing 'User Management' and 'Web Services'. The main content area is titled 'User management' and contains a section 'Find Users'. This section has a search bar with the placeholder text 'Search for:' and a text input field containing 'A User'. Below the search bar is a 'Find' button.

3. You use the search functionality to search for the user you require by name or user ID.

4. Enter a search string. For example:



This screenshot is identical to the previous one, but the text input field in the search bar now contains the search string 'Steve James'.

Note: The search is not case sensitive.

5. Click the Find button.

6. The system lists the users that meet that search term:

ADMIN MENU

- User Management
 - Add a User
- Web Services

Search results for "james"

User name	Added	Updated
stevejames@8458823	10 November 2009	10 November 2009

Tip: You can also select a user from the list of recently added/changed users:

Last 5 added / edited users		
User name	Added	Updated
nickanderson@agbuyer	16 December 2008	22 February 2009
ronsmail@agbuyer	05 January 2009	03 February 2009
adamgeorge@agbuyer	24 April 2008	20 January 2009

Click the user name for the relevant user to display the user details. See User Details below.

7. Click the user name link for the user you wish to edit.

8. The User Profile page is displayed:

Start Shopping

Transactions

Supplier Directory

RFQ Management

Free Text Requisitions

Service Requests

ADMIN MENU

User Management

Add a User

Web Services

User management - view User

[← Back](#)

Edit this profile

Mr Steve James

Status	Active
Username	stevejames@8458823
Email address	dummyxyz@sch000ls.com
Organisation	PServe Test School 300
Address	123 Buckingham Palace Road London SW1W 9SR United Kingdom
Telephone number	
Fax number	
Preferred language	English (UK)
Role	Purchaser
Data Feed(s)	News

Editing a User Account. Click the Edit this profile button.

10. The Edit User page is displayed:

The screenshot shows the 'Edit User' page for a user named Steve James. The page has a sidebar on the left with navigation links: Start Shopping, Transactions, Supplier Directory, RFQ Management, Free Text Requisitions, Service Requests, ADMIN MENU, User Management (highlighted), Add a User, and Web Services. The main content area is titled 'User management' and contains a link to 'Back without saving changes'. Below this is the 'Edit User – Steve James' form. The form fields are: Title (Mr), First name* (Steve), Last name* (James), Status (Active), Username (stevejames@8458823), Email address* (steve@sch000ls.com), Confirm Email address* (steve@sch000ls.com), Organisation (PServe Test School 300), Default address* (123 Buckingham Palace Road, SW1W 9SR), Telephone number, and Fax number.

11. The following is displayed and can be edited:

FIELD NAME	FIELD CONTENT
Title, First Name, Last Name	Mandatory
Username	Cannot be changed
Email Address	Mandatory
Confirm email Address	Mandatory
Organisation	Cannot be changed
Default Address	Mandatory
Telephone Number	Optional
Fax Number(Optional).	Optional
Preferred Language	Mandatory
Role	Mandatory
Data Feeds	Admin Users Only

Warning! Email addresses are unique, they can only be used once.

12. Click 'Save' when complete

Note: Changes to a user profile may not be completed until after the user logs back into the system.

2.3.2 Web Services

2.3.2.1 Web Services Account

Overview

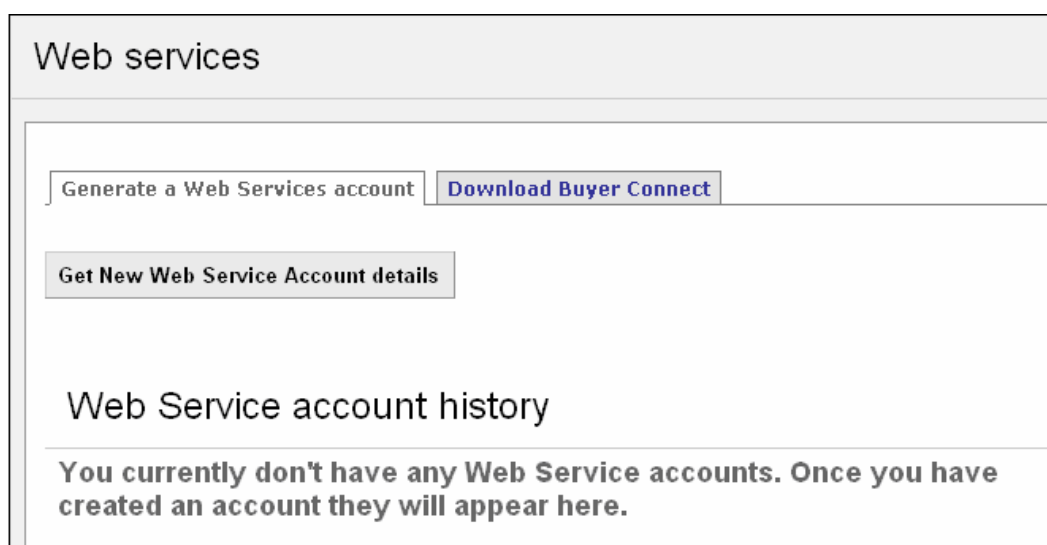
The web services functionality allows you to download documents such as Shopping Baskets, Invoices & Credit Notes and send out Purchase Orders from your Financial Management System (FMS).

Configuring Web Services

1. Log into the marketplace using an Authoriser login, and select the new menu option Web Services.



2. The following screen will be displayed. The tab “Generate a Web Services account” is used to create the new web services credentials.



3. Click on the 'Get New Web Service Account details' button and the following screen will be displayed (with varied web service account details).

Success! A new web services account has been created for you. The username and password are below.

USERNAME: 772337082@WSCON

PASSWORD: EaoANGs3Qn

This account must be validated within **5 days**. Validation is achieved by adding these details into the BuyerConnect application or your FMS Web Services solution. Failure to validate within 5 days will require you to generate additional web service accounts.

Please note - you should use a unique web service account for all solutions that are used to support electronic trading e.g. BuyerConnect and your FMS solution.

Web Service account history

Account Username	Created by	Creation date	Validated	Last active
772337082@WSCON	John Smith	09 November 2009	No (expires in 5 days)	

Warning: There is now a 5 day countdown to apply these account credentials to the BuyerConnect or FMS solution. If this is not done within 5 days, the account details listed will expire and cannot be used and a new web services account must be requested by following step 2 above

4. Configure your application's Web Service to reflect this new configuration. If you require further assistance and use BuyerConnect view the next section. If you do not use BuyerConnect please contact your service provider.

5. Once complete you can review the Web Services tab and your Account Username's validation should have updated to 'Yes' as shown below:

Web services

Generate a Web Services account
Download Buyer Connect

Get New Web Service Account details

Web Service account history

Account Username	Created by	Creation date	Validated	Last active
772337082@WSCON	John Smith	09 November 2009	Yes	09 November 2009

2.3.2.2 BuyerConnect

Overview

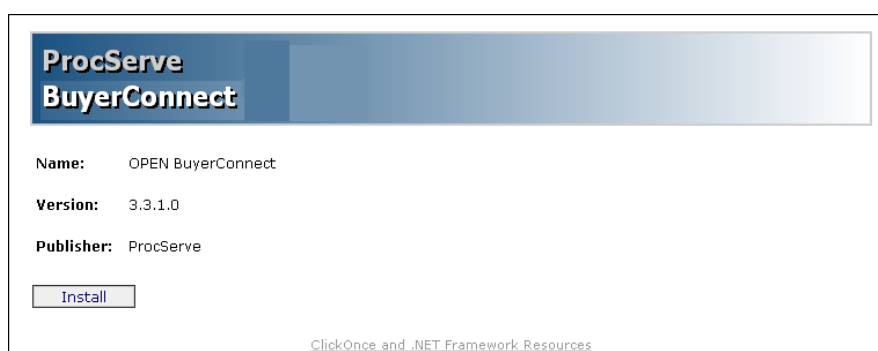
BuyerConnect is a ProcServe product that allows you to integrate any desktop application with the ProcServe Trading Network without the need for your application to be able to send and receive transaction documents.

To download and install BuyerConnect:

1. Click on the button above labeled "Download BuyerConnect"



2. choose the "Install" option in the resulting window and choose to install the application



3. Then once it has installed double click on the new BuyerConnect icon, on the right side of the windows start bar, to configure the application



Please Note - The BuyerConnect™ product is provided by ProcServe but is not supported. All support queries / issues with this application must be passed to the Department for Education via the email address mailbox.buyerconnect@dcsf.gsi.gov.uk.

3

Catalogue Shopping

3 Catalogue Shopping

3.1 Overview of Catalogue Searching

Overview

The search engine allows you to run to various types of search for items in the catalogues available to you. This section will provide you with a brief overview of how the search functionality works and give you some hints and tips on the best ways to use the search engine.

How does search work?

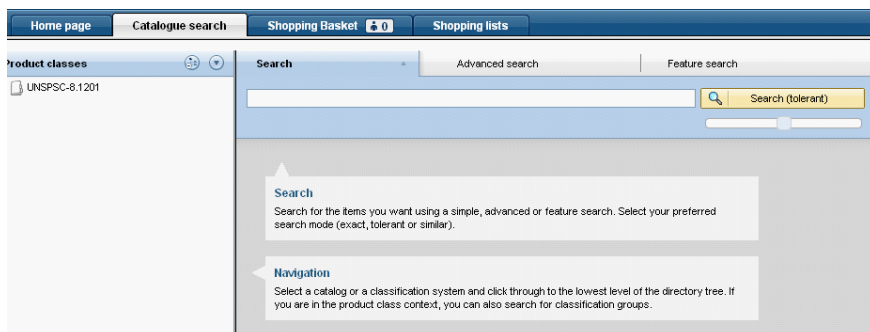
When a supplier creates a catalogue, they complete a template that mandates information put into key fields to fully describe the products or services that they provide. When you enter a search term, the search engine searches across some of these fields to ensure you return the best possible results.

The key fields that a supplier completes and the system searches across are:

- Supplier Item Number
- Item Short Description
- Item Long Description
- Supplier Name
- Manufacturer Item Number
- Manufacturer Name
- Item Keywords

When searching, the system allows you to adjust how the search works across the searchable fields by using the slider bar on the catalogues tab. Moving the slider bar will change how the system searches and will affect how many results are returned.

The slider bar has three settings and these are described below:



Exact	The search details you type in the search field must exactly match what is in the catalogue
Tolerant	The system will allow for some minor discrepancies including some common spelling mistakes e.g. recieved will find received
Similar	The system will use a wider scope and broaden the search based on the

information you used in the search field. For example, if you searched for **towel** you could return **trowel**.

This table below shows what fields are searched and how they are searched based on which slider bar setting is selected:

Slider bar setting	Item Number	Short Description	Long Description	Keywords	Supplier Name	Manufacturer Item Number	Manufacturer Name
Exact	Equal	Contains	Contains	Not Used	Equal	Equal	Equal
Tolerant	Begins With	Tolerant	Tolerant	Contains	Contains	Begins With	Contains
Similar	Begins With	Similar	Similar	Similar	Contains	Begins With	Contains

When a search term is entered, the results may include where the word(s) appear in any order in:

- **A single field**
- **Across one or more fields** (e.g. one word in short description and one word in supplier name).

Using the System – Example

You would like to order some A4 Books. You decide to type A4 Book in the search field and click search. The system will perform a search for each word individually and return items where one of the words exists in one of the searchable fields.

Some typical examples of the types of results you can expect to see from this search are below with the words returned by the search in **bold**:

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	A4 Paper	A4 Reams Note Pad in various sizes	Book and Paper Co	Paper, Reams
086-961	Reading Books	A5 & A4 Reading Books	Schools Supply Co	Book , reading, children
116-630	A4 Writing Pads		Schools Supply Co	Pad, recycled, a4, Book
Q3T376	Address Books	Hard Backed address book with tabs. Size A4	Book and Paper Co	
R5C945	A4 Books	A4 Size Books	Book and Paper Co	

Other Ways of Searching - Exact Word and Wild Card Search

There are some additional elements of functionality that can be used to enhance the search process

dependant on what you want to search for:

• Exact Word Search:

If you want to search for an exact word or words, you should place the word(s) in quotation marks. This will find the word(s) in the order entered within a single searchable field.

Using the same example as above, searching for "A4 Book" will bring back results from the highlighted columns as they are the only ones with the search term in a single field.

Supplier Part No.	Short Description	Long Description	Supplier Name	Keywords
Z1A223	A4 Paper	A4 Reams Note Pad in various sizes	Book and Paper Co	Paper, Reams
086-961	Reading Books	A5 & A4 Reading Books	Schools Supply Co	Book , reading, children
116-630	A4 Writing Pads		Schools Supply Co	Pad, recycled, a4, Book
Q3T376	Address Books	Hard Backed address book with tabs. Size A4	Book and Paper Co	
R5C945	A4 Books	A4 Size Books	Book and Paper Co	

• Wildcard Search:

There are two variations on the wildcard search available to a user. A question mark is used to replace a single character and an asterisk is used to replace any number of characters.

Question Mark (?)

Use this to replace a single character within a search. Searching for **wh?te** will return results such as **white** and **whyte**.

Asterisk (*)

Use this to replace a string of letters either at the end or beginning of a word. Searching for **ave*** will return results such as **Avery** Labels, **average** contents and winged **avenger**. Searching for ***ave** will return results such as **Wave** Pens, Super **Save** Ltd and **rave** reviews.

3.2 How to Search

Overview – How To Search

This section shows you the various ways to use the search functionality.

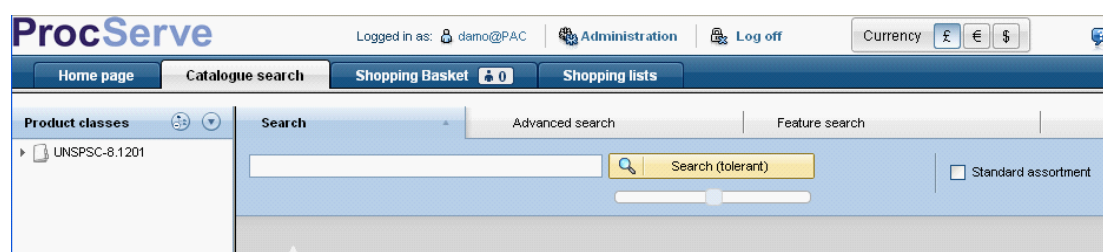
Locating the catalogue search feature

The following steps describe how you locate and use the catalogue search feature to create a requisition from a catalogue:

1. Punch-out from your P2P in to the Marketplace:

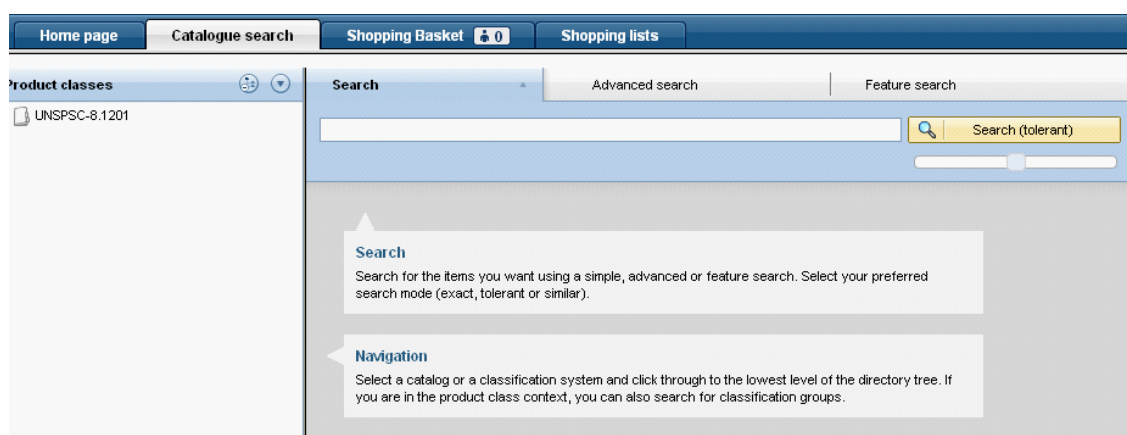
2. The catalogue is opened in a new window:

From here you can complete a simple keyword search in the search field.




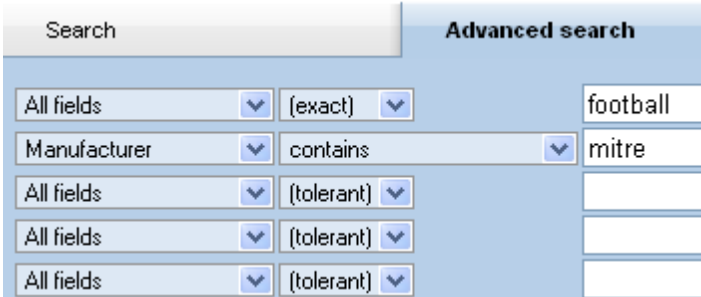

3. Using the Search Features to find your items:

Click the catalogue search tab:



The following list describes ways you can search:

Product Classes	<p>You can use the UNSPSC tree to the left of the search page to navigate through the folder structure to a Product Class in order to return the items classified within that Product Class as shown below. Note: Only UNSPSC codes which you have access to will be displayed.</p>
------------------------	--

	<ul style="list-style-type: none"> ▼ 16 Field and court sports equipment <ul style="list-style-type: none"> 00 Field and court sports equipment (uncoded) ▼ 15 Field sports equipment <ul style="list-style-type: none"> 00 Field sports equipment (uncoded) 02 Baseball gloves 03 Baseballs 04 Footballs
Search Tab	<p>A simple search allows you to locate items by entering keywords in the Search field and clicking the Search button.</p> 
Advanced Search	<p>The Advanced Search allows you to search specific fields and with conditions. Click the Advanced Search tab to display the advanced search fields and build your search rules as shown below.</p> 
Feature Search	<p>The Feature Search allows you to filter items within your Search results that meet certain criteria. To perform a Feature Search you need to select the Feature Search tab and a Product Class from the left hand pane, before selecting from the drop down boxes the features that you wish your items returned to contain as shown below:</p> 

Tip: The catalogue and or UNSPSC code must be assigned correctly in the Classification Views for you to be able to find it.

Tip: When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has been rebuilt. The Search Index is scheduled to run 23:00 daily. Once this is complete you can use the Search Tab to find items.

Tip: Only some catalogues will support feature search.

Tip: If you cannot find the items you wish to order - try the UNSPSC Tree search feature.

Tip: If you have too many items to work with you can filter your search using the Simple or Advanced Search features.

4. Filter on Search Results

When you search for a specific item, you will then see a filter option on the left hand side where there will be a number of options for you to choose from

Options include:

- A breakdown of items per catalogue
- A breakdown of items per supplier
- A breakdown of items per Manufacturer
- A breakdown of items per Lead Time
- Product Classes

The screenshot shows a search interface with a left-hand filter pane and a right-hand search results pane.

Search filter

Catalogues

- ☐ *Schools Davies Sports Cat1* (523)
- ☐ *Schools Supply Zone Cat* (202)
- ☐ *SCHSYPOCat1* (78)
- ☐ *Schools NES Arnold Cat1* (70)
- ☐ *Schools AtoZ Cat1* (58)
- ☐ *Schools GLS Education Cat1* (58)
- ☐ *Schools WNW Cat1* (58)
- ▶ More selection

Suppliers

- ☐ *Davies Sports* (523)
- ☐ *Supply Zone* (202)
- ☐ *YPO (Yorkshire Purchasing Organisation)* (78)
- ☐ *NES Arnold* (70)
- ☐ *GLS Educational Supplies* (58)
- ☐ *AtoZ* (58)
- ☐ *WNW* (58)
- ▶ More selection

Manufacturer

- ☐ *Not specified* (1,274)
- ☐ *MITRE* (12)
- ☐ *TALLON* (1)
- ☐ *Fellowes* (1)
- ▶ More selection

Search

football

▶ Search for: football





⚠ 1000 Items

Item no.
5000796
5000802
71.1560
160379

If you tick on one of the options in the filter results, you will be presented with more item details and further breakdown of information from chosen supplier:

For more information see 'The Item Details Page' section of this guide.

5. Working with the Search Results:

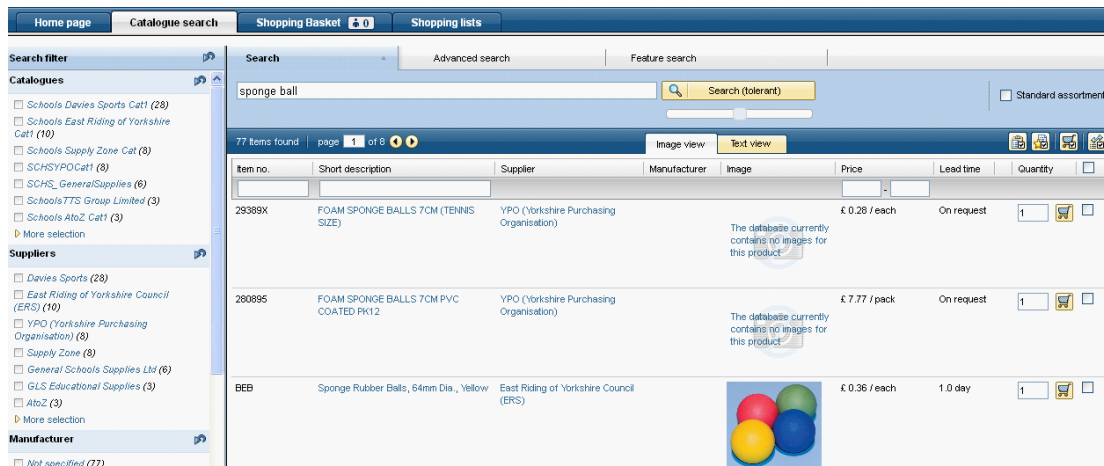
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later
Add to Comparison List		You can add all the checked items to a Comparison
Add to Favourites		You can add all the checked items to your Favourites List for future use
Add Selected Item(s) to cart		Check each item to be added and click the shopping cart icon

3.3 Examples of Searching

Here are some common examples of using the search system

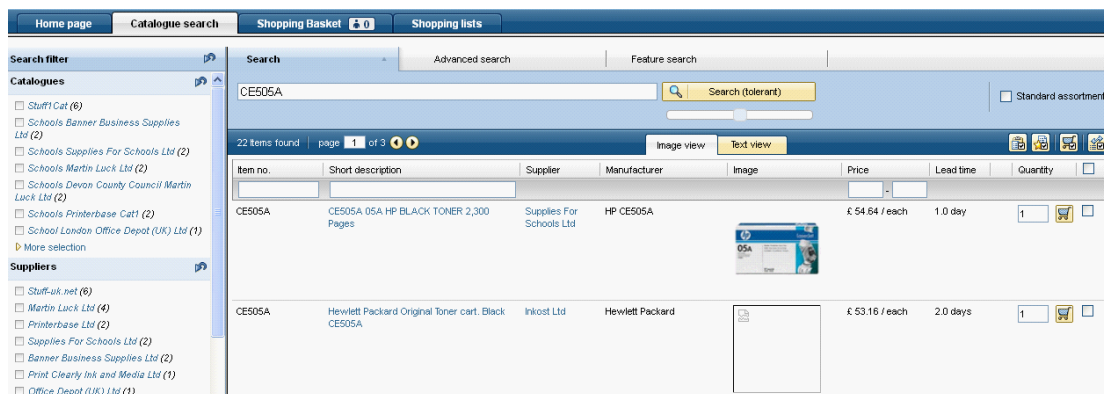
Q. I want to buy a sponge ball but am unsure exactly what type of sponge ball I want.

A. Try putting both words (sponge and ball) into the search box. Putting in just one of the words may make your search too wide.



Q. I need a toner cartridge for a HP LaserJet P2550d printer. The code on the cartridge is CE505A.

A. Try searching for the cartridge model number (CE505A). Put CE505A in the search field and this will return results with the product code anywhere within them.



Q. I want to buy some AA batteries from my local supplier Hills Components Limited.

A. You could try putting AA into the search field. This however would bring back too many results as the search term entered is too vague. You could try adding additional words to the search such as battery but this would also bring back items from suppliers you are not interested in.

To get a precise return, use the advanced search functionality. Put the words Hills and AA as shown in the example below making sure each term searches on the correct field.

Search **Advanced search** Feature search

Supplier contains Hills And ☐ Standard assortment




Short description contains AA And

All fields (tolerant) And

All fields (tolerant) And

All fields (tolerant) And

47 items found | page 1 of 5

021-4311	AA TO C SIZE BATTERY CONVERTER & AA 800mA BATTERY	Hills Components Limited		£ 0.90 / each	1.0 day	<input type="text" value="4"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Details"/>
021-4339	AA + AAA RECHARGEABLE BATTERY PACK	Hills Components Limited		£ 7.95 / pack	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Details"/>
02-5866-CQ	AA -1500 PROCELL BATTERY (BOX OF 100)	Hills Components Limited		£ 25.00 / box	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/>	<input type="button" value="Details"/>


Q. I have been asked to get some carbonless 2 ply paper in white/pink. I have been given the product code from the supplier's catalogue but have not been told the suppliers name.

A. Enter the product code into the search field. If the supplier has a catalogue on the system then the item will be returned.

Search **Advanced search** Feature search

☐ Standard assortment

6 items found

Item no.	Short description	Supplier	Manufacturer	Image	Price	Lead time	Quantity	
003R99107	003R99107 XEROX Premium Digital Carbonless Paper White/Pink A4 2-Ply 250 Sets	Supplies For Schools Ltd	XEROX 003R99107		£ 13.26 / each	1.0 day	<input type="text" value="1"/>	<input type="button" value="Add to cart"/> <input type="button" value="Details"/>

Q. I need to find the price on an anemometer but am unsure how it has been spelt by the supplier.

A. Try searching using the beginning of the word then using the wildcard search tool. Put anem* into the search field. If this brings back too many results then consider adding extra letters to your search. This example will bring back items with the letters anem at the beginning of a word in the item data.

Search

Advanced search

Feature search

anem*







Search (tolerant)

☐ Standard assortment

23 items found | page 1 of 3

Image view

Text view

Item no.	Short description	Supplier	Manufacturer	Image	Price	Lead time	Quantity	
1BB	Anemometer	East Riding of Yorkshire Council (ERS)			£ 11.65 / each	1.0 day	1	
088059	Anemometer With Product Guide	WESTWARD PAPER SALES		 <div>The database currently contains no images for this product</div>	£ 14.70 / each	2.0 days	1	
461121	ANEMOMETER	YPO (Yorkshire Purchasing Organisation)		 <div>The database currently contains no images for this product</div>	£ 13.75 / each	On request	1	

3.4 The Items Details Page

Overview

This section describes how to use the Item Details page.

The Item Details page provides you with a detailed description of an item and a list of related items you may wish to consider.

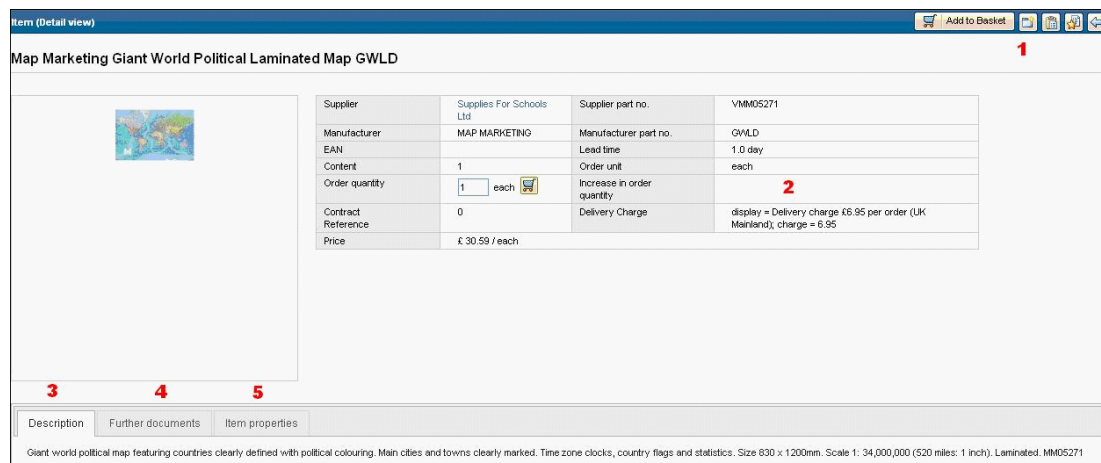
Locating the Item Details Page

The Item Details page is accessed from:

- **The Shopping Cart.** In the shopping cart click the short description to display item details in a popup window.
- **The Search Results List.** In the Search Results area click the short description to display item details in the Search Results area.

About the Item Details Page

The following image is an example of the Item Details page from an item in the Search area. The three numbered areas are (1) Action Icons; (2) Item Details; and (3) Associated Items. These are shown in greater detail below:



The following list describes the major features of Items details page:

(1) Action Icons: These icons are not displayed if the item is already in your Shopping Cart:

Add Item to Basket		Click to add item to your Shopping Basket
Open Items Details		Click to view item details in new window
Add to Favourites		Click to add item to your Favourites List
Add to Shopping List		Click to add item to your Shopping List
Return to Search Page		Click to return to Search Page

(2) Item Details: A summary of the item details. To view any associated documents click on any link in the Further Documents field.


Add to Shopping Cart	 Add to Basket	Click to add item to your Shopping Basket
-----------------------------	--	---

Note: In the Shopping Cart item details pop-up you cannot change the quantity.

(3) Description: This gives a more detailed description of the item.

(4) Further Documents: This may include additional images

(5) Item Properties: This may include further details of item

Add to Basket	 Add to Basket	Click to add item to your Shopping Basket
----------------------	--	---

3.5 Comparing Items

Overview

This section describes how to compare items. You can build a list of items to be compared and compare one of the items against the others.





Building the Compare Item List

The following steps describes how you can add items to and use the Comparison List:

1. Locate the items you are considering purchasing.

2. Mark the items you wish to compare by selecting the right check box for each item:








For example:




283 items found page 1 of 29									
Image view Text view									
VMM30001	Map Marketing World Political Laminated Map BEX	Supplies For Schools Ltd	MAP MARKETING BEX		£ 17.95 / each	1.0 day	1		<input checked="" type="checkbox"/>
VMM05271	Map Marketing Giant World Political Laminated Map GVLD	Supplies For Schools Ltd	MAP MARKETING GVLD		£ 30.59 / each	1.0 day	1		<input checked="" type="checkbox"/>

3. Add Selected Items.










Click the Add Selected Items icon. Items details are listed in the Compare Items window:

	<input type="checkbox"/> Compare with this column  	<input type="checkbox"/> Compare with this column  
Short description	Map Marketing World Political Laminated Map BEX	Map Marketing Giant World Political Laminated Map GWLD
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

Tip: If you want to compare items on several different pages of the comparison list, you must click on  before you go to the next page otherwise your selection will be lost. The comparison list will be retained if you close the window with  or if you use the search function to create a new item list. You can open the comparison window again by clicking on .




4. Using the Compare Items List:

Compare with This Column Check Box. Check this box to highlight differences between this item and all other items.

	<input checked="" type="checkbox"/> Compare with this column  	<input type="checkbox"/> Compare with this column  
Short description	Map Marketing World Political Laminated Map BEX	Map Marketing Giant World Political Laminated Map GWLD
Price	£ 17.95 / each	£ 30.59 / each
Supplier	Supplies For Schools Ltd	Supplies For Schools Ltd
Supplier part no.	VMM30001	VMM05271
Manufacturer	MAP MARKETING	MAP MARKETING
Manufacturer part no.	BEX	GWLD
EAN		
Content/Order unit	1 / each	1 / each
Lead time	1.0 day	1.0 day
Description	Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001	Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271
Unit of Purchase Quantity	1	1
Image		
Further documents	Item Information URL	Item Information URL

5. Differences are highlighted as shown in the above image.

6. On the Compare Page you can:

Remove Item		Click the Remove Icon to remove the relevant item from the Comparison List.
Add to Cart		Click the Add to Cart icon to add the relevant item to your shopping cart.
Empty Compare List		Click this icon to close the Comparison window and empty the Comparison List.

3.6 Smart Forms

Overview

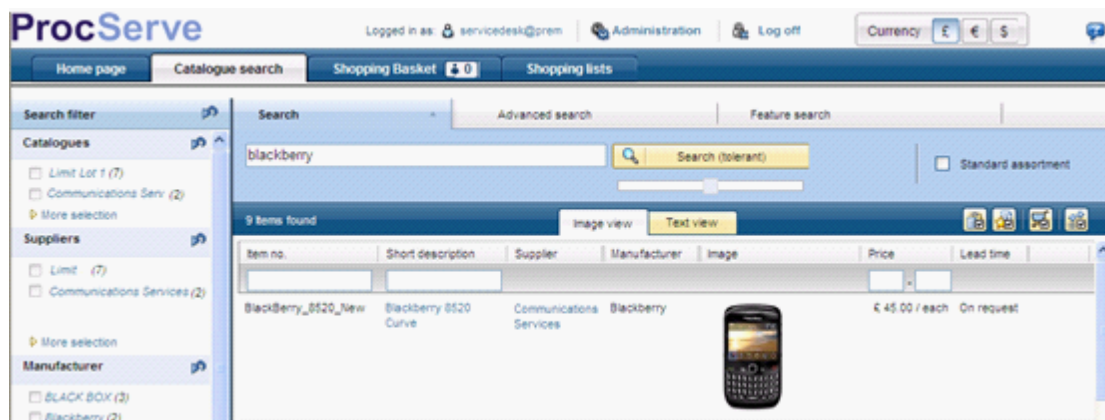
This section describes Smart Forms and how to use them.

What is a Smart Form?

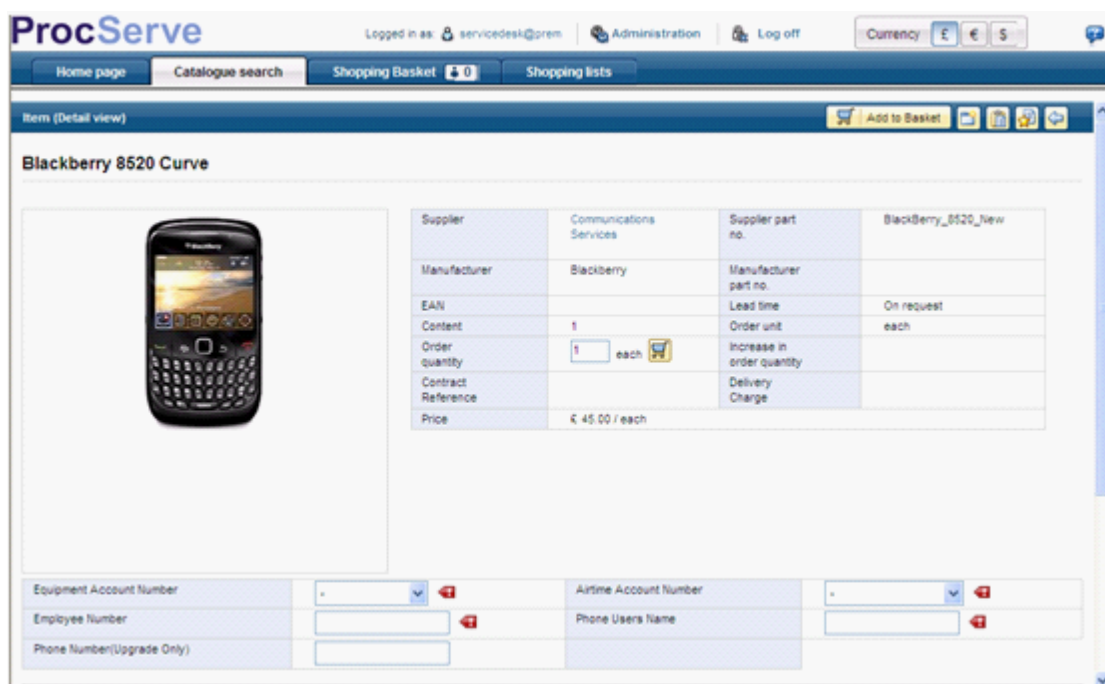
A Smart Form is used in certain catalogues to capture additional information that is typically unique to the particular purchase. Smart Forms enable the supplier to create user defined fields which can be either free text or drop down lists. Each field can be specified as either mandatory or optional with those fields that are mandatory needing to be completed before you can check out.

Completing the Smart Form?

The Smart Form is contained within the items details of the line item.



1. Clicking the link of an item will take you in to the details



2. The Smart Form details can then be completed as required

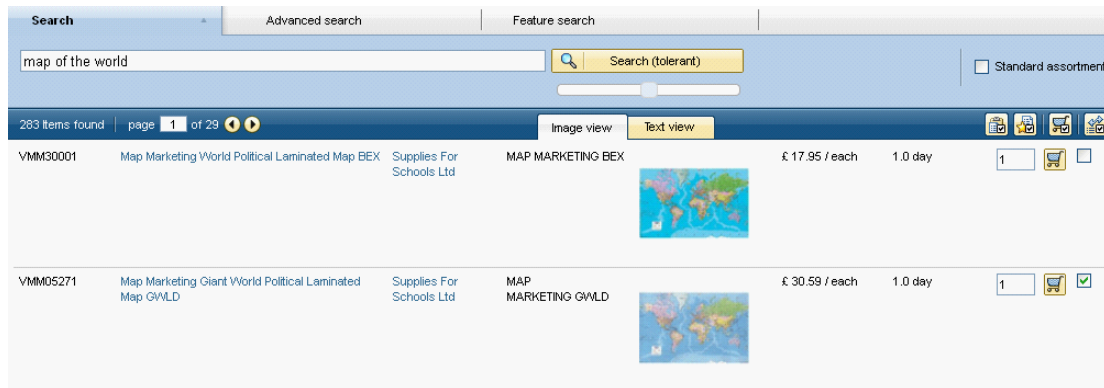
3.7 Adding Items to your Shopping Cart

Overview

This section describes how you add items to your Shopping Basket and manage your shopping cart.

1. Adding Items to your Cart:

Having found the item or items you wish to add to your requisition in the Search page you can now add them to your cart:



2. If required you can change the quantity and check the box in the right hand column:

If you only require this item then you can add item to shopping basket by clicking on the Shopping Basket icon



, or if more than one item is ticked on you can click on the Add Selected Items To Shopping Basket Tab



If you want to continue shopping, you can simply search for another item and repeat above process.

3. When you add items to your shopping cart the shopping cart tab will flash for a short while and will be updated with the number of items you added:

For example if you added an item to your shopping cart that already had an item in it the new total will be two:

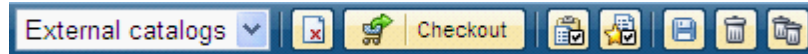
4. Reviewing Shopping Cart:

You can review and update your shopping cart and when you are satisfied with the items send the requisition. At any time during shopping you can click the shopping cart tab to view the contents:

The shopping cart contains the items you have selected for your requisition. You can continue shopping by clicking the catalogue search tab at any time.

You can add or remove items from your cart, change quantities or cancel the purchase.

Also note that delivery charge if applicable, will be included in the shopping basket tab

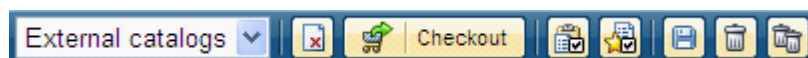


The table below highlights the additional options available to you when working with the Shopping Cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase, click the Cancel Purchase icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.

6. Checkout:

When you have checked that the items you wish to order are OK you are ready to click the checkout button.



Note: The order will not be sent to the supplier until your requisition has been approved.

Note: Shopping Basket Caching - Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.









7. If your Checkout is successful:

You will be redirected to your P2P or back office system.

3.8 Working with your Shopping Cart

Overview





You can make changes to your cart, cancel the purchase or send the requisitions using the cart. The following list provides a description of the components of the shopping cart:

External Catalogues		You can punch out to an external catalogue.
Items		You can click on the Short Description to view a more detailed description of the item.
Cancel Purchase		To cancel the purchase click the Cancel Purchase icon.
Add Multiple Item(s) to cart		Check each item to be added and click the multiple shopping cart icon.
Save Changes		You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes.
Delete Selected Items		Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Delete All Items		Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion.
Add to Shopping List		You can add all the checked items to a Shopping List which you can change and re-use later.
Add to Favourites		You can add all the checked items to your Favourites List for future use.
Checkout	 Checkout	Click this icon when you are ready to send the requisition. The requisition will now be available for the authoriser to import into your back office for approval

You may also notice a number of icons next to specific items. These are used by suppliers, where relevant, to enhance specific items:

The following is a guide to icons you may see on the marketplace:

Central Hub Item		Content from this icon is from Mandated Contracts. UK Public Sector Organisations only.
Collaborative-Content		Item is part of Collaborative Contract or Framework Agreement

Core-Item		Core-Item within a contract
Environmentally-Friendly		Items showing this icon are recyclable, bio-degradable, carbon neutral or otherwise Environmentally Friendly.
Hazardous-Item		Items displaying this icon are Hazardous Materials (HazMat).
Price-Break		Price Breaks occur when you receive a discount for buying larger quantities of this item.
Required Associated Item(s)		A Required Associated Item(s) is an item which MUST be purchased if the original item is purchased.
Optional Associated Item(s)		Optional Associated Item(s) are not automatically added to shopping basket.

3.9 Working with Favourites

Overview

This section describes how to work with your favourite items.

Your Favourite items are available as a list on your Home page. You use favourites to add items you order frequently.

Adding to Favourites

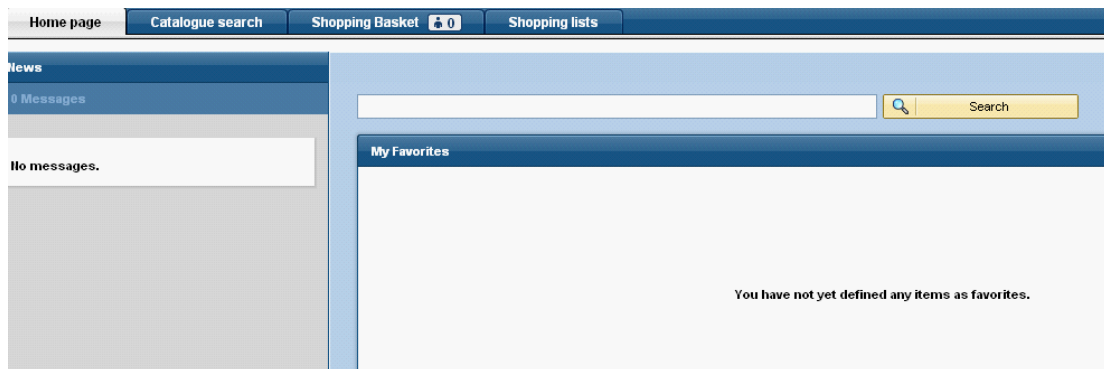
The following steps describe how you add and work with favourites:

1. You can add to your favourites whenever you see this icon:

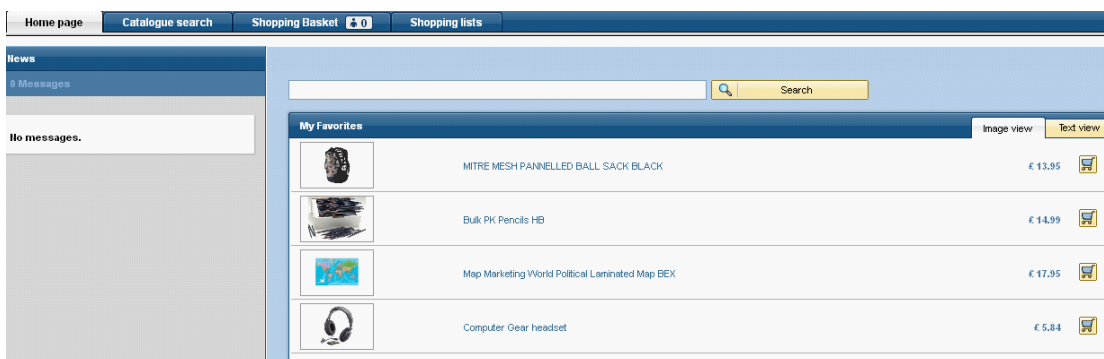


2. The Home Page Favourites List

Favourites are shown on the landing page of the ProcServe Catalogue System.











The Home Page will always display **You have not yet defined any items as your favourites** until an item is added:







3. The following describes how you work with the Home Page Favourites List:

- **Image View and Text View.** You can switch between a view that includes the item images and a text view. The image view is shown in the above image. Text view does not show any images:

Image View

My Favorites		Image view	Text view
	MITRE MESH PANNELLED BALL SACK BLACK	£ 13.95	
	Bulk PK Pencils HB	£ 14.99	
	Map Marketing World Political Laminated Map BEX	£ 17.95	
	Computer Gear headset	£ 5.84	

Text View

My Favorites			Image view	Text view
MITRE MESH PANNELLED BALL SACK BLACK		£ 13.95		
Bulk PK Pencils HB		£ 14.99		
Map Marketing VWorld Political Laminated Map BEX		£ 17.95		
Computer Gear headset		£ 5.84		

• **Item Details.** Click an Item description to view the Item details.

• **Add Item to Shopping Cart.** Click this icon







Add to Basket to add the item to your Shopping Cart.

4. Working With Your Favourites List.

You can delete items, add multiple items to the Shopping Cart or add items to a Shopping List using the Favourites List within the Shopping Lists tab.

5. In the Catalogue navigate Shopping Lists >> My Favourites:


Home page		Catalogue search		Shopping Basket 0		Shopping lists																																									
Shopping lists				My favorites																																											
<div><input type="checkbox"/> Company shopping lists</div> <div><input type="checkbox"/> Group shopping lists</div> <div><input type="checkbox"/> Private shopping lists</div> <div><input checked="" type="checkbox"/> My favorites</div>				<div></div> <table><tr><th>Item no.</th><th>Short description</th><th>Supplier / Service provider</th><th>Lead time</th><th>Price</th><th>Quantity</th><th>Amount</th><th></th></tr><tr><td>PSGD80301</td><td>MITRE MESH PANNELLED BALL SACK BLACK</td><td>Davies Sports</td><td>4 days</td><td>£ 13.95 / each</td><td><input type="text" value="1"/></td><td>£ 13.95</td><td><input type="checkbox"/></td></tr><tr><td>GP500HB</td><td>Bulk PK Pencils HB</td><td>MERSEYSIDE PAPER SUPPLIES</td><td>1 day</td><td>£ 14.99 / pack</td><td><input type="text" value="1"/></td><td>£ 14.99</td><td><input type="checkbox"/></td></tr><tr><td>VMM30001</td><td>Map Marketing World Political Laminated Map BEX</td><td>Supplies For Schools Ltd</td><td>1 day</td><td>£ 17.95 / each</td><td><input type="text" value="1"/></td><td>£ 17.95</td><td><input type="checkbox"/></td></tr><tr><td>A0376598</td><td>Computer Gear headset</td><td>Equanet</td><td>5 days</td><td>£ 5.84 / each</td><td><input type="text" value="1"/></td><td>£ 5.84</td><td><input type="checkbox"/></td></tr></table>				Item no.	Short description	Supplier / Service provider	Lead time	Price	Quantity	Amount		PSGD80301	MITRE MESH PANNELLED BALL SACK BLACK	Davies Sports	4 days	£ 13.95 / each	<input type="text" value="1"/>	£ 13.95	<input type="checkbox"/>	GP500HB	Bulk PK Pencils HB	MERSEYSIDE PAPER SUPPLIES	1 day	£ 14.99 / pack	<input type="text" value="1"/>	£ 14.99	<input type="checkbox"/>	VMM30001	Map Marketing World Political Laminated Map BEX	Supplies For Schools Ltd	1 day	£ 17.95 / each	<input type="text" value="1"/>	£ 17.95	<input type="checkbox"/>	A0376598	Computer Gear headset	Equanet	5 days	£ 5.84 / each	<input type="text" value="1"/>	£ 5.84	<input type="checkbox"/>
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6. The following list describes how you work with the Favourites:

• **Update Quantity.** You can change the Quantity for an item and click the Save icon (see below). The new quantity is saved for later use. You can also update the quantity prior to adding to your Shopping Cart.

• **Mark Item.** To mark an item for deletion or adding to a Shopping List or cart you check the box in the right hand column. You can mark as many items as you like.

Save Changes		Save changes to your Favourites.
Delete Items		Delete items that have a Tick in the checkbox from your Favourites.
Add to Shopping List		You can add all the checked items to a Shopping List

		which you can change and re-use later
Add Item(s) to Cart		Check each item to be added to your cart and click the multiple Shopping Cart icon

3.10 Working with Shopping Lists

Overview

This section describes how to work with your Shopping Lists.




A Shopping List allows you to save items so that you can quickly create a requisition at a later date. For example, if you create a monthly artistic supplies requisition you can save all the items in a Shopping List, add to the shopping cart and then review and send the requisition.

Adding Items to Your Shopping Lists

1. Whilst shopping you can add to your Shopping List by clicking this icon



The following list describes how to use this page:

Create New Shopping List		To create a new Shopping List enter a name and description in the relevant fields. The new Shopping List is displayed.
Add to Shopping List		Add the items to the relevant Shopping List. The existing Shopping List is displayed with item(s) added.
Back Icon		Return to the previous page. Changes are not saved.

2. Locating your Shopping Lists:

Click Shopping Lists tab:

Home page	Catalogue search	Shopping Basket 0	Shopping lists																
<div>shopping lists</div> <div> <input type="checkbox"/> Company shopping lists <input type="checkbox"/> Group shopping lists <input checked="" type="checkbox"/> Private shopping lists <input type="checkbox"/> My favorites </div>																			
<div>Private shopping lists</div> <table> <thead> <tr> <th>Last modified</th><th>Name</th><th>Description</th><th>Mark</th></tr> </thead> <tbody> <tr> <td>Aug 5, 2011</td><td>fortnightly stationery order</td><td>Order fortnightly starting 08/08</td><td><input type="checkbox"/></td></tr> <tr> <td>Aug 5, 2011</td><td>Computing accessories</td><td>General computer goods</td><td><input type="checkbox"/></td></tr> <tr> <td>Aug 5, 2011</td><td>Sporting goods</td><td>Regularly ordered sporting items</td><td><input type="checkbox"/></td></tr> </tbody> </table>				Last modified	Name	Description	Mark	Aug 5, 2011	fortnightly stationery order	Order fortnightly starting 08/08	<input type="checkbox"/>	Aug 5, 2011	Computing accessories	General computer goods	<input type="checkbox"/>	Aug 5, 2011	Sporting goods	Regularly ordered sporting items	<input type="checkbox"/>
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Aug 5, 2011	Sporting goods	Regularly ordered sporting items	<input type="checkbox"/>																

3. About the Shopping List Page.






The following list describes the Shopping List:

Company Shopping List	These are for use throughout the organisation. Note: Only catalogue administrators can create, edit and delete these lists.
Group Shopping List	These are for use by groups of users. Note: Only authorised employees can create and change these lists.
Private Shopping List	These are shopping lists you create for your own use. Note: Only you can create and change these lists.

4. Working with Shopping Lists.

The following list describes how you work with shopping lists:

Open Shopping List		You can click the Name link for a Shopping List to
---------------------------	--	--

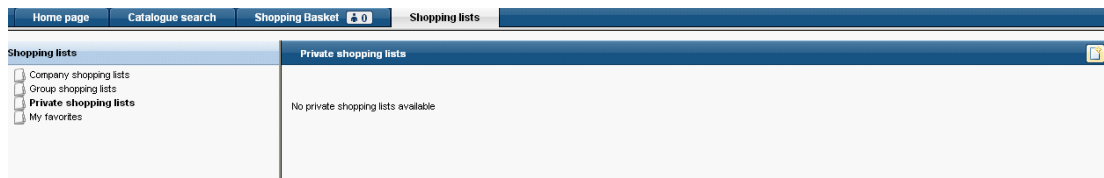
		display the items
Marking Shopping List		You mark an item by checking the relevant Mark box in the right hand column.
Replace Shopping Cart with Marked Items		Replace the entire Shopping Cart with all marked Shopping Lists.
Add Marked Shopping Lists to Shopping Cart		Add the all items from all marked Shopping Lists to your current Shopping Cart.
Delete Marked Shopping Lists		Delete all marked Shopping Lists. A prompt is displayed. Click the OK button to delete the marked Shopping Lists.
Create Shopping List		Create an empty Shopping List for future use

5. Create New Shopping List

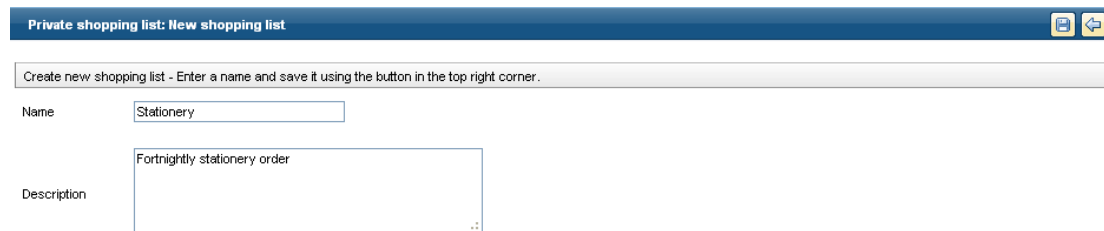
You can create an empty Shopping List for future use. Click this icon



to display these fields:



Where you can then enter the Shopping List details:



The following list describes how you work with the create Shopping List page:

Name	Enter a name for the new Shopping List.
Description	Enter a description for the new Shopping List.
Save Icon	Click the Save icon to validate, and if valid, save the new Shopping List.






There are no items in this new Shopping List. You will need to add items to this Shopping List if you wish to use it.

6. Working with Shopping List Items.

When you click on the name link for a Shopping List the contents of the list are displayed:

Private shopping list: fortnightly stationery order							
Item no.	Short description	Supplier / Service provider	Lead time	Price	Quantity	Amount	
VRX13485	Rexel Agenda2 Stationery Sorter Charcoal 2101037	Supplies For Schools Ltd	1 day	£ 10.13 / each	<input type="text" value="1"/>	£ 10.13	<input type="checkbox"/>
WX21718	Gel Pens Red	MERSEYSIDE PAPER SUPPLIES	1 day	£ 2.95 / pack	<input type="text" value="1"/>	£ 2.95	<input type="checkbox"/>
WX26040	Ball Pens Black	MERSEYSIDE PAPER SUPPLIES	1 day	£ 1.98 / pack	<input type="text" value="1"/>	£ 1.98	<input type="checkbox"/>
012426	30CM WHITE RULERS PACK OF 100	The Consortium for Purchasing and Distribution Ltd	2 days	£ 12.99 / pack	<input type="text" value="1"/>	£ 12.99	<input type="checkbox"/>
C20	C20 Erasers	MERSEYSIDE PAPER SUPPLIES	1 day	£ 2.25 / pack	<input type="text" value="1"/>	£ 2.25	<input type="checkbox"/>
MYA3	Mycopy A3 copier paper	MERSEYSIDE PAPER SUPPLIES	1 day	£ 4.75 / ream	<input type="text" value="1"/>	£ 4.75	<input type="checkbox"/>

The following list describes how you use the Shopping Items list page:

Show Item Details	You can click the Short Description for an item to view item details.
Quantity	You can change the quantity for an item.
Marked Box	Check the box for each item you to apply a particular action to (for example deletion or add to favourites).
Save Changes	 Click this icon to save any changes to your Shopping List.
Delete Selected Items	 Click this icon to delete all selected items. A prompt is displayed. Click the OK button to delete the selected items. Click the Cancel button to cancel the deletion
Add Selected Items to Favourites	 Click this icon to add all selected items to your Favourites.
Add Selected Items Shopping Cart	 Click this icon to add the all items from all marked Shopping Lists to your current Shopping Cart.
Back Icon	 Click the Back icon to return to the Shopping Lists page. Changes are not saved

3.11 Double Punch-out Sites

Overview

Punch out means you can go to a suppliers eProcurement site, shop and bring your items back to your shopping cart.

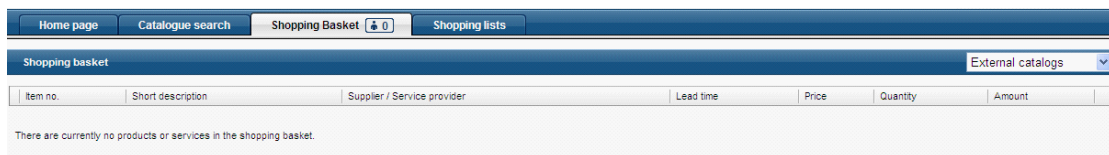
Whilst punch out sites can be provided for any Supplier they are commonly used when a standard catalogue may not be appropriate because of the need to personalise or configure a purchase e.g. a computer could be customised by adding extra memory or a larger hard disk.

Locate and Open the Shopping Cart

The following steps describe how you punch out to an external Supplier site from the ProcServe Marketplace.

1. Click the Shopping Cart tab

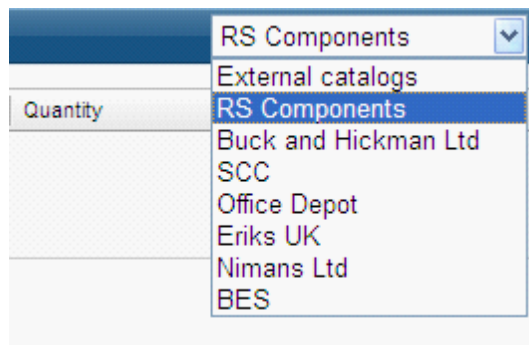
2. The Shopping Cart is displayed:



Note: The above image shows an empty Shopping Cart. The cart could also have other items in it.

3. The External Catalogues Drop Down

Open the external catalogues drop-down list:



4. Select one of the External Suppliers from the drop down.
5. The selected Suppliers website will open in a new window.
6. Shop online with this Supplier as you usually would.
7. When you have finished your external shopping you can checkout.
8. The items you chose are displayed in Shopping Cart.
9. You can continue to shop or work on your Shopping Cart.

