



TNSmartShop

Job Aid

Contents

Objectives	3
What is TNSmartShop?	3
The Benefits of Using TNSmartShop	3
Creating an Edison Requisition using the TNSmartShop Web Tab	4
TNSmartShop Home Screen	6
Selecting Items for Order	7
Review and Submit	8
Additional Information	11
Product Search Dropdown	11
Order Type Dropdown	11
Shopping Cart Icon.....	12
Saved Carts.....	12
Viewing the Shopping Cart.....	16
Using the Search Tabs.....	16
Staples	19
Saving a Search to Favorites	19
Comparing Items	20
Logging Out	20
My Settings	21
Using TNSmartShop to view State of Tennessee Contract Documents	21

This training is focused on teaching users who will be using TNSmartShop for day to day purchasing. This training assumes that the user has basic knowledge of current purchasing processes and policies.

HINT

Internet Explorer is the recommended internet browser for TNSmartShop.

Objectives

- Administrate and use TNSmartShop for purchasing from vendors who have punch-out and hosted catalogs.
- Successfully navigate through the TNSmartShop interface.
- Learn the shopping basics of TNSmartShop.
- Learn to use the saved carts and sharing carts functionality.
- Use the cart check out feature to bring the items selected in TNSmartShop into a requisition.

What is TNSmartShop?

TNSmartShop is an online repository for procurement personnel that is designed to improve visibility, access and the utilization of goods and services from vendors who have punch-out and hosted catalogs.

The Benefits of Using TNSmartShop

- It allows you to automatically dispatch purchase orders to a supplier, when auto dispatched is turned on.
- It allows you to search across multiple suppliers and catalogs.
- It allows you to save commonly purchased items in a saved cart.
- There is an item comparison feature, allowing you to compare all items in TNSmartShop.

Creating an Edison Requisition using the TNSmartShop Web Tab

To create a Requisition, you must first be logged in to Edison. Once logged in you can navigate to creating a requisition by following the links below.



1. Click **FSCM**.
2. Click **eProcurement**.
3. Click **Create Requisition**.

This is the main page for creating a Requisition, and has links that will go to the various sections that need to be completed. The sections are grouped under three main tabs, and are highlighted in yellow when in use.

The screenshot shows the 'Create Requisition' page with three tabs: '1. Define Requisition' (highlighted in yellow), '2. Add Items and Services', and '3. Review and Submit'. Below the tabs, there is a form with the following fields: Business Unit (32101 General Services), *Requester (alys0728001 Alyssa Cave), *Currency (USD), Requisition Name, Doc Type, and Priority (Medium). A 'Continue' button is at the bottom.

*Confirm that your **business unit** and **requester** information have defaulted correctly.*

4. Enter a **Requisition Name** that will be easy for you to identify for future use.
5. Enter the **Doc Type**.
6. Click **Continue** to be automatically be brought to the **Add Items and Services** tab.

The screenshot shows the 'Create Requisition' page with three tabs: '1. Define Requisition', '2. Add Items and Services' (highlighted in yellow), and '3. Review and Submit'. Below the tabs, there is a search bar and a 'Search' button. Below the search bar, there are tabs for 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. Below these tabs, there is a table titled 'Direct Merchants' with the following data:

Logo	Merchant	Description
	TNSmartShop	TNSmartShop

7. Click on the **Web** tab and select the **TNSmartShop Direct Connect** link. This will open up the TNSmartShop screen.

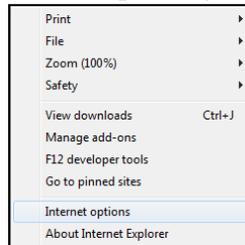
HINT

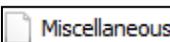
When you receive the security warning saying “Only secure content is displayed” click **Show all content**. Clicking this may revert you back to the *Define Requisition* tab, so refrain from entering information until the **Show all Content** button has been clicked.

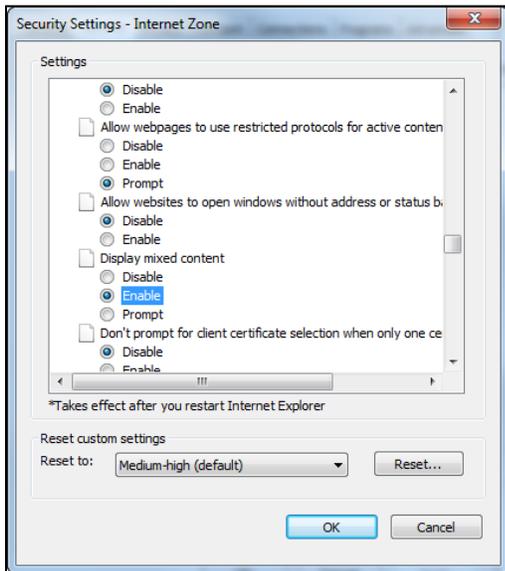


To prevent this message from displaying in Internet Explorer follow the steps below.

- A. Click on the **Tools** icon .
- B. Click on **Internet Options**.
- C. Click on the **Security** tab.



- D. Click on the  button.
- E. Under the  header locate the **Display mixed content** setting.

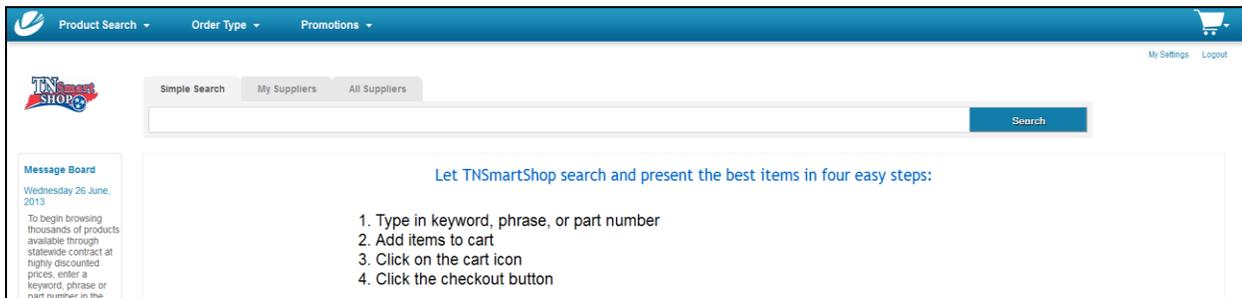


F. Click **Enable**.

G. Click **OK**. The changes will take effect after Internet Explorer has been restarted.

TNSmartShop Home Screen

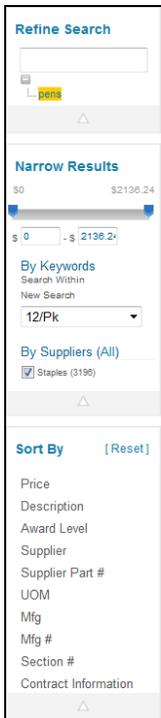
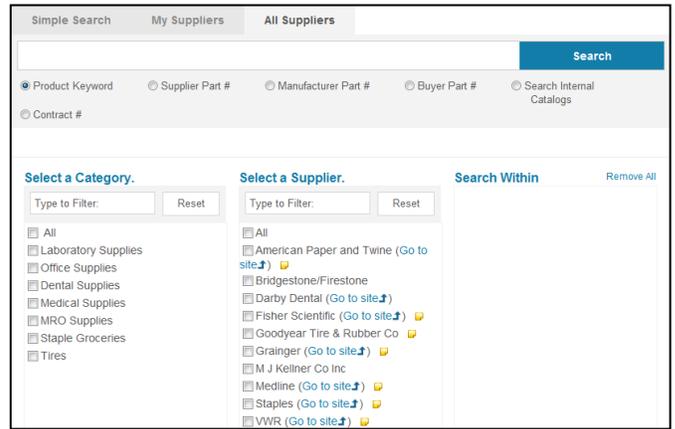
TNSmartShop is designed to be a process similar to online shopping. The home screen is used for searching. Along the top of the screen are additional features including: Product Search, Order Type, Promotions, and Your Cart.



Selecting Items for Order

The All Suppliers tab is the preferred tab for searching in TNSmartShop.

8. Click on the All Supplier link to search for your item.
9. Enter the item description.
10. Select the Supplier for the item. If unsure of the Supplier select All.
11. Click Search to search for the item.



If necessary the results can be filtered using the actions on the left side of the screen. Enter additional search words in the **Refine Search** field to narrow down the selection. This feature will only search for items with all of the search words included in their description. **Narrow Results** can be used to set a price range for items. The **By Keywords** drop-down menu allows you to search items by keyword. The results can also be narrowed by using **By Supplier** to deselect any unwanted suppliers. The following items can be used to sort with the **Sort By** feature: price, description, award level, supplier, supplier part #, uom, mfg., mfg#, section #, or contract information.

12. Enter the correct quantity.
13. Click Add to Cart.

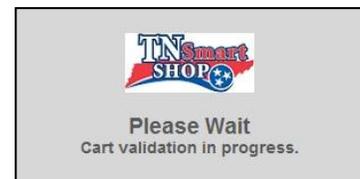


A pop-up will appear saying “Please Wait Cart Validation in Progress”. Wait until this pop-up goes away to proceed.

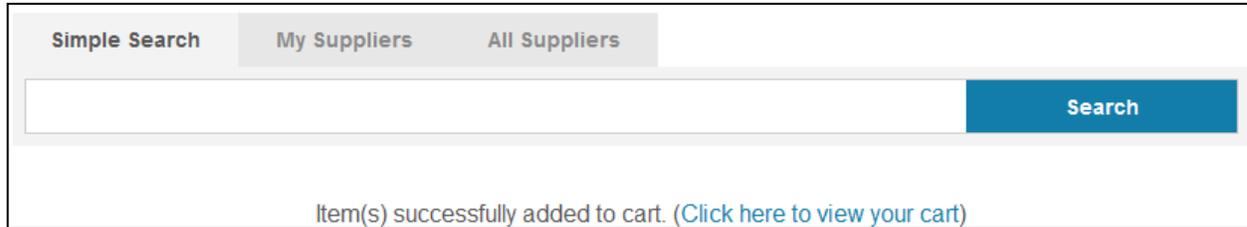
Repeat steps 9-13 to add all necessary items to the cart.

HINT

Item pricing may change during cart validation because cart validation ensures that the most up to date information is being obtained from the vendor.

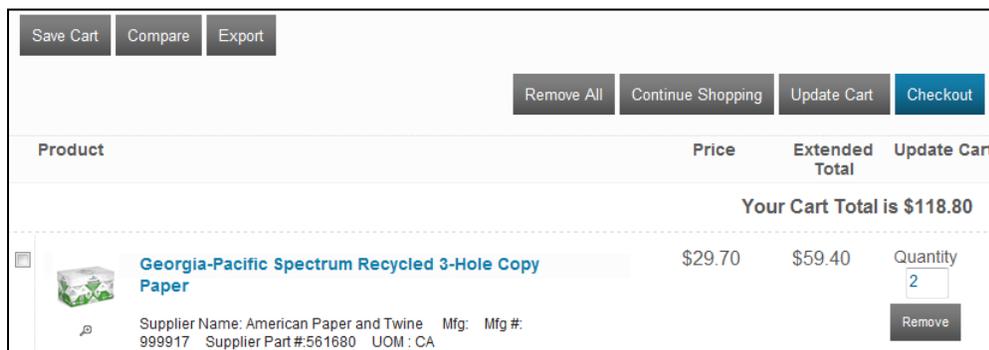


Once you click Add to Cart, the screen will refresh and provide you with a confirmation that the items have been added to your Shopping Cart. This message also provides a link to the shopping cart if the user is finished shopping.



Once all necessary items have been added to the order go to your cart to finalize the order.

14. Click on the  icon. This will bring the user to the cart summary screen.



From this screen you will be able to change quantities or remove items from your cart. When updating any cart information it is important to click Update Cart. This cart can also be saved for later use by clicking Save Cart.

15. Click Checkout to return to the Edison Add Items and Services screen.

Review and Submit

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: General Services *Currency:

*Requester: Alyssa Cave Priority:

Requisition Name:

Doc Type:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Georgia-Pacific Spectrum Multi	American Paper & Twine Co	10.0000	Ream	2.72000	27.20

Select All / Deselect All Total Amount: 27.20 USD

HINT Quantities are not editable from the Review and Submit screen, because when using the TNSmartShop feature the quantities are confirmed with vendor inventory before the items are added to the cart.

17. Click on the Review and Submit tab to finalize your requisition.

Modify Line / Shipping / Accounting

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'Apply' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Vendor ID: Vendor Location:

Buyer: Category:

Shipping Information

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Information

Percent	Location	GL Unit	Fund	Dept	Account	Location CF	Program
1	<input type="text"/>	<input type="text" value="32101"/>	<input type="text"/>				

 [Load Values From Defaults](#)

18. Click the Select All/Deselect All link to select all lines.
19. Click the Modify Line/Shipping/Accounting link.
20. Enter Shipping information in the Ship To field.
21. Enter all necessary accounting codes in the Accounting Information field.
22. Click Apply.
23. Select which lines the information applies to.
24. Click .

Distribution Change Options

For the selected requisition lines, apply distribution changes to

All Distribution Lines
Apply changes to all existing distribution lines.

Comments

justification

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

 [Find more items](#)

25. Enter all necessary Justifications and Comments for the requisition.
26. Click the Approval Justification checkbox.
27. Click Save & Preview Approvals.

Confirmation			
Requested For:	Alyssa Cave	Number of Lines:	1
Requisition Name:	test	Total Amount:	0.00 USD
Requisition ID:	0000026958		
Business Unit:	32101		
Status:	Open		
Priority:	Medium		
Budget Status:	Not Checked		
<hr/>			
<input type="button" value="Submit"/> <input type="button" value="Edit Requisition"/> <input type="button" value="Apply Approval Changes"/> <input type="button" value="Check Budget"/>			

28. Write down the requisition id.
29. Click Check Budget.
30. Click Submit.

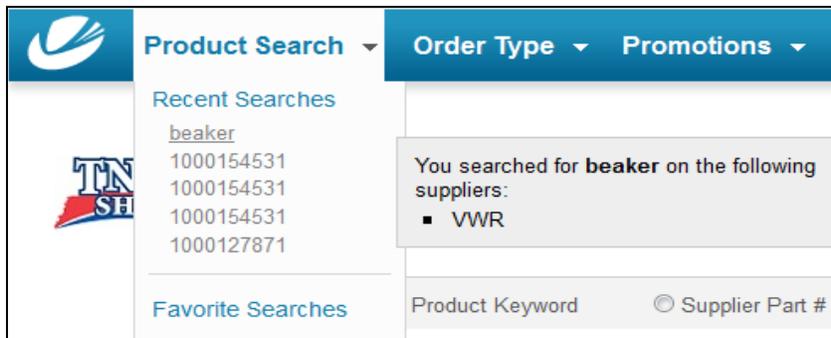
The Requisition process is now completed and the Purchase Order should be created to finalize the purchase.

Additional Information

The section below provides information that will assist users when purchasing from TNSmartShop. This information will not be relevant or necessary for every purchase that is made from TNSmartShop.

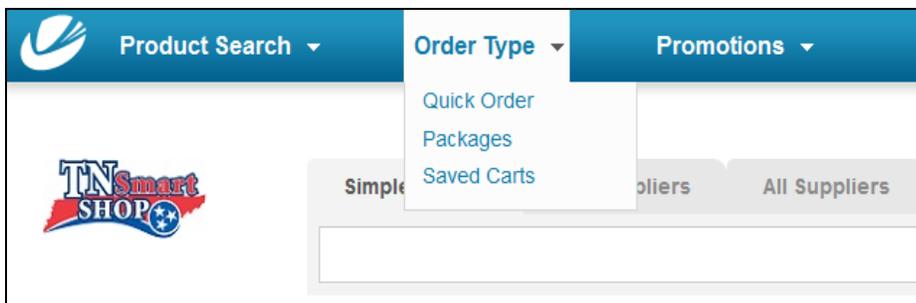
Product Search Dropdown

This dropdown menu is used to show recent searches as well as saved searches. Click on the searches to run them. To see which supplier has been used in the same search, hover over any of the recent searches.



Order Type Dropdown

This dropdown menu is used to access Quick orders, Packages, and saved carts. These functions provide additional ordering options. Quick orders and Packages are not currently used. The Saved Cart feature allows the user to save a cart for future use, as TNSmartShop will not automatically save the items for the user.



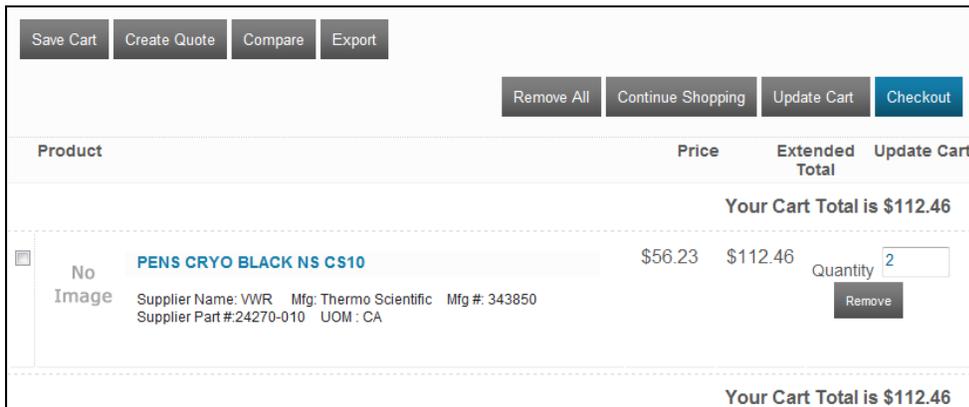
Shopping Cart Icon

Hover over the shopping cart icon to view the number of items and the dollar value of the items in the current cart. This drop-down menu also allows you to view your Last Active Cart, which is the last cart that you created. If connection is lost with TNSmartShop, navigate to the Last Active Cart to restore your order.



Saved Carts

Saved carts can be used in many ways including: storing frequently used items to reduce shopping time, beginning the process and completing it later, and cart sharing. Carts are saved from the main cart screen by clicking the Save Cart button.



To save a cart it must have a Cart Name and Cart Description. Enter this necessary information and then click Save Cart.



HINT To save to an existing cart click the *Add to Existing Saved* Cart button. Select a saved cart from the dropdown menu and then click *Update Saved Cart*.

Saved Carts

[Update Saved Cart](#)

[Saved Carts](#) > [Add To Existing Saved Cart](#) Select a Saved Cart ▾

A message will then display telling the user that the cart has been saved.

[Save Cart](#) [Compare](#) [Export](#)

Cart Saved Successfully
Product

To locate a saved cart click on the cart icon and click on saved carts link.

Saved Carts

Click on the saved cart name to view its contents.
Note: Item(s) being added to the cart from the supplier's website, which do not have a corresponding SmartSearch agent will be dropped from the cart.

Line	Cart Name	Creation Date	Cart Description	Action
1	alison test	02-22-2013 16:13:19	-	
2	bhavanakawadi	03-01-2013 01:01:13	-	
3	saved caert	03-01-2013 02:38:07	-	
4	Test saved cart	03-01-2013 04:30:40	-	

Shopping

2 Line items
20 Items
\$39.30
[View Cart](#)

Last Active Cart

Saved Carts
Stickies
Pushpins
Paper Order June
Supply Order123
General Supply Order

The Save Carts screen allows users to complete various actions by clicking on the different icons.

The **Add Saved Cart Items to Cart** icon allows the user to add previously saved carts to existing carts. The cart validation message will appear and once the items have been added the user will automatically be taken to the cart.

Please Wait
Cart validation in progress.

Share Cart
 Saved Carts > Share Cart
 Cart Name: Pens
 Cart Description: Pens

Share With

Email:

Users List:
 alyssa.cave@tn.gov | EPROC USER
 alyssa.cave@tn.gov | NON EPROC
 alyssa.cave@tn.gov | EPROC USER

Cart Contents

Line	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
1		Paper Mate Gel Retractable Pens, Micro Point, 0.5 mm, Red Ink / Red Barrel, 12/Pk	Staples	894428	\$2.09	DZ	<input type="text" value="10.0"/>	\$20.90
Total :								\$20.90

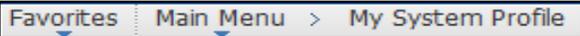
To share a cart with another EPRO user, click on the **Share Cart** icon .

1. From the Share Cart screen enter the user's email and then select the EPROC USER email.
2. Click Add to List to add the email to the Users List.

Repeat steps 1-2 for each user that should be added.

3. Once users have been added the Share Cart button will populate. Click the  button.

Once the cart has been successfully shared the user will receive the following confirmation **The cart has been shared successfully.** The user(s) will receive email confirmation of the shared cart.

HINT Edison cart sharing is only available between users with valid email addresses in the Edison system. To verify that your email is entered correctly in Edison follow the provided navigation. 

The **Edit Saved Cart Items** icon  will allow the user to delete individual items or edit quantities in existing saved carts.

1. Click on the **Edit Saved Cart Items** icon  to edit the Saved Cart. This will bring you to the Edit Saved Cart screen.

Edit Saved Cart
 Saved Carts > Pens
 Cart Name:
 Cart Description:

Cart Contents

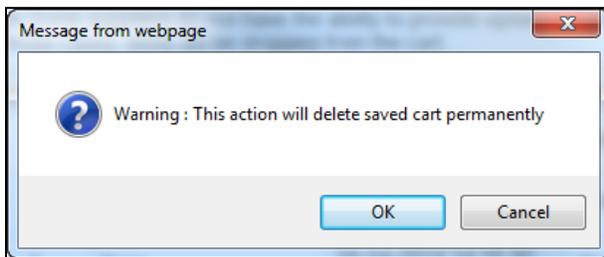
Delete	Product Image	Description	Supplier Name	Part Number	Price	Unit	Qty	Total
<input type="checkbox"/>		Paper Mate Gel Retractable Pens, Micro Point, 0.5 mm, Red Ink / Red Barrel, 12/Pk	Staples	894428	\$2.09	DZ	<input type="text" value="10"/>	\$20.90
Total: \$20.90								

2. Make the desired changes to the item(s).
3. Click the  button. The user can now navigate away to the desired screen.

Saved Carts
 Click on the saved cart name to view its contents.
 Note: Item(s) being added to the cart from the supplier's website, which do not have a corresponding SmartSearch agent will be dropped from the cart.

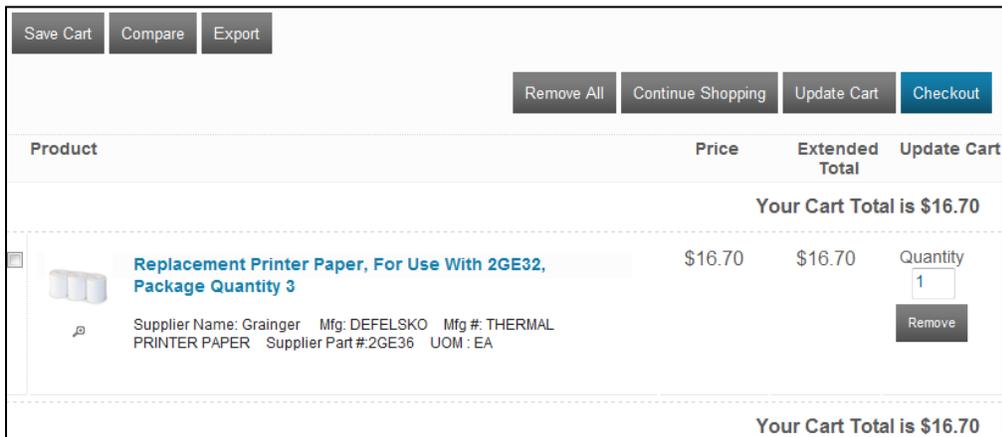
Line	Cart Name	Creation Date	Cart Description	Action
1	alison test	02-22-2013 16:13:19	-	   
2	bhavanakawadi	03-01-2013 01:01:13	-	   
3	saved caert	03-01-2013 02:38:07	-	   
4	Test saved cart	03-01-2013 04:30:40	-	   

From the main Saved Carts screen the user can click the **Delete Saved Carts Items** icon  to delete any of the existing saved carts. Click **OK** to confirm the message.



Viewing the Shopping Cart

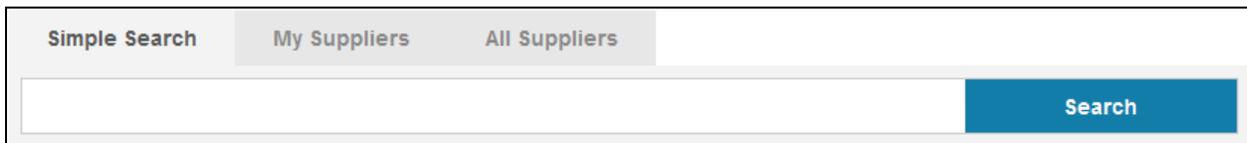
By clicking directly on the cart icon  the user can use a variety of features. The Save Cart feature allows you to save the contents of the cart and use them for or add them to future purchases. The Compare feature allows the user to compare items that are checked. You can also remove all items or remove items individually. After updating the Update Cart icon should be clicked. The Continue Shopping and Update Cart features are also used on this screen. Click the Checkout button allows you to return to the Edison requisition with all of the selected items. These items will become lines of the Requisition.



Product	Price	Extended Total	Update Cart
Your Cart Total is \$16.70			
 Replacement Printer Paper, For Use With 2GE32, Package Quantity 3	\$16.70	\$16.70	Quantity 1 Remove
Supplier Name: Grainger Mfg: DEFELSKO Mfg #: THERMAL PRINTER PAPER Supplier Part #:2GE36 UOM : EA			
Your Cart Total is \$16.70			

Using the Search Tabs

There are three options when searching using TNSmartShop. The **first search option** is the **Simple Search** which will intelligently search based upon previous search results. This search allows the user to put in the description of the item that they are searching for and then click search. The user can also enter the Supplier part number, Manufacturer Part number, or the Edison Item ID as search criteria.



Simple Search My Suppliers All Suppliers

Search

HINT

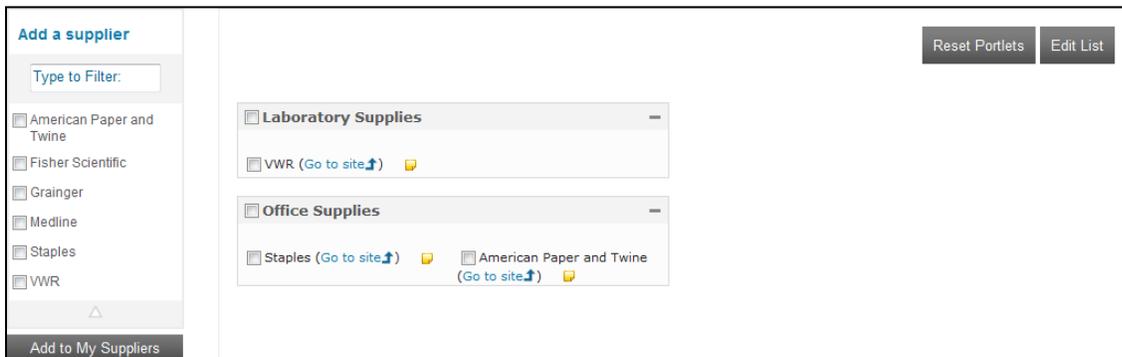
The simple search will only pull items that have been purchased on TNSmartShop before, meaning that it may not pull every item that is available to the user. The Simple Search will get smarter the more TNSmartShop is used.

The second search option is **My Suppliers**. This option allows you to save which suppliers you would like to search from.



The screenshot shows a search interface with three tabs: 'Simple Search', 'My Suppliers', and 'All Suppliers'. Below the tabs is a search input field and a blue 'Search' button.

When first using this screen it will be necessary to select any of the suppliers that you want to search and then click add to my suppliers. This will populate all of the selected suppliers on the My Suppliers screen. The Edit List feature allows you to edit the list, and the Reset Portlets feature allows the user to keep the changes.



The screenshot shows the 'Add a supplier' screen. On the left, there is a filter section with a 'Type to Filter:' input and a list of suppliers: American Paper and Twine, Fisher Scientific, Grainger, Medline, Staples, and VWR. Below this list is an 'Add to My Suppliers' button. On the right, there are two portlets: 'Laboratory Supplies' and 'Office Supplies'. The 'Laboratory Supplies' portlet contains 'VWR (Go to site)' with a yellow notepad icon. The 'Office Supplies' portlet contains 'Staples (Go to site)' and 'American Paper and Twine (Go to site)', both with yellow notepad icons. In the top right corner, there are 'Reset Portlets' and 'Edit List' buttons.

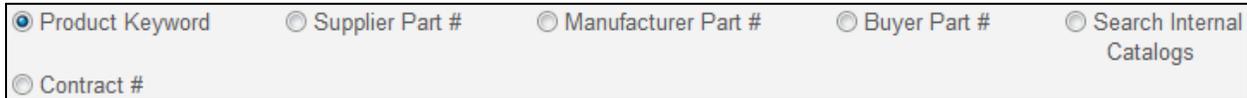
HINT *If the supplier has a yellow notepad icon next to it the user can click on it to receive additional information about the vendor. It contains vendor contact info, a copy of the contract, terms and conditions and specifications (when applicable).*

The third search option is **All Suppliers**. This is the search method that should be used, as it is the most effective.



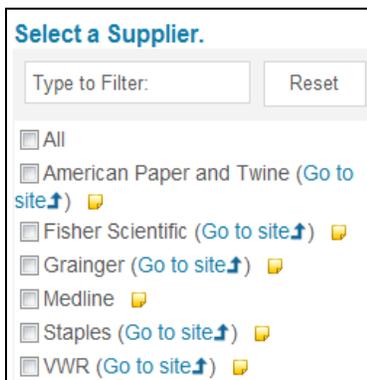
The image shows a search interface with three tabs: "Simple Search", "My Suppliers", and "All Suppliers". The "All Suppliers" tab is currently selected. Below the tabs is a search input field and a blue "Search" button.

This search allows the user to search one or more suppliers using any of the following criteria:



The image shows a row of search criteria options, each with a radio button: "Product Keyword" (selected), "Supplier Part #", "Manufacturer Part #", "Buyer Part #", "Search Internal Catalogs", and "Contract #".

Items can be searched for by product keyword, supplier part number, manufacturer part number, contract #. The Contract # search option can only be used for the Bridgestone/Firestone, and MJ Kellner contracts. To use this feature enter the asterisk symbol (*) as your search to bring back all items available on TNSmartShop from these vendors.



The image shows a "Select a Supplier." form. It has a "Type to Filter:" input field and a "Reset" button. Below the input field is a list of suppliers with checkboxes and "Go to site" links, each followed by a comment icon:

- All
- American Paper and Twine (Go to site) 
- Fisher Scientific (Go to site) 
- Grainger (Go to site) 
- Medline 
- Staples (Go to site) 
- VWR (Go to site) 

Click on the [\(Go to site\)](#) link to be brought to the supplier's website. These websites will contain varying levels of information. The following sites will allow users to select items from the suppliers website to bring back in to TNSmartShop: APT, Darby Dental, Grainger, Medline, Staples, and VWR.

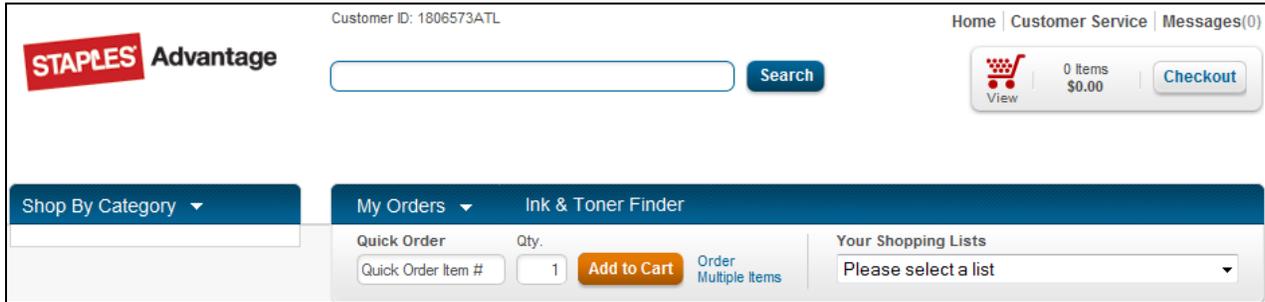


The image shows a vendor details popup for "Fisher Science Education". It includes the following information:

- Vendor Name: Fisher Science Education 
- Statewide: SWC 563, Laboratory
- Supplies NASPO Co-op
- Contract: 447
- Vendor Contact: Michele Tyson
- Phone: Customer Svc Main: 800.640.0640
- Customer Svc Science Ed: 800.767.7000
- Michele: 224.735.9630
- Email: Michele.tyson@thermofisher.com
- [Fisher Contract](#)

Click on the **Comments** icon  next to the supplier to reveal supplier contact information.

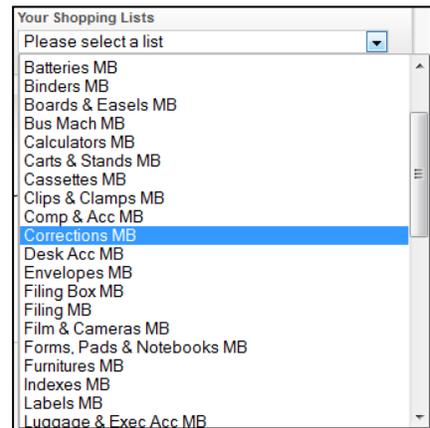
Staples



On the Staples website go to the Your Shopping Lists feature. This feature has all market basket items listed by category. Select the category for your item and a list will populate with all market basket items for that specific category.

Once an item is selected, Staples indicates Market Basket items for TNSmartShop users using this icon.

HINT To return to the Requisition without adding items click on the link.



Saving a Search to Favorites

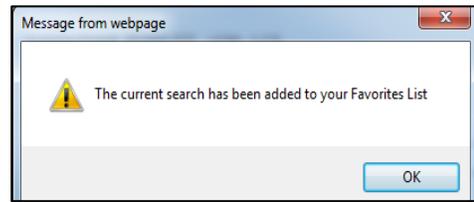
If the user expects to perform the same search and filter choices often, it can be saved for reuse. Once the search has been completed and the filters set click on the Save as Favorite link.



After click the Save as Favorites button a box will pop up allowing you to name the search. Name the search and then click Save.

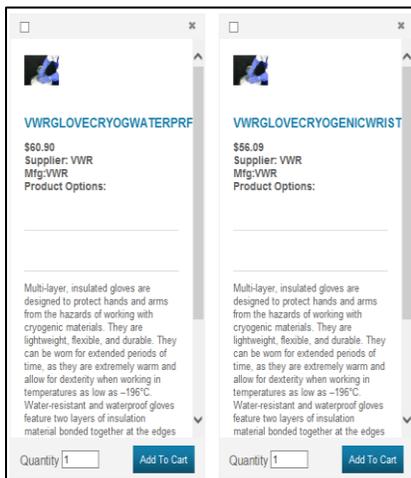
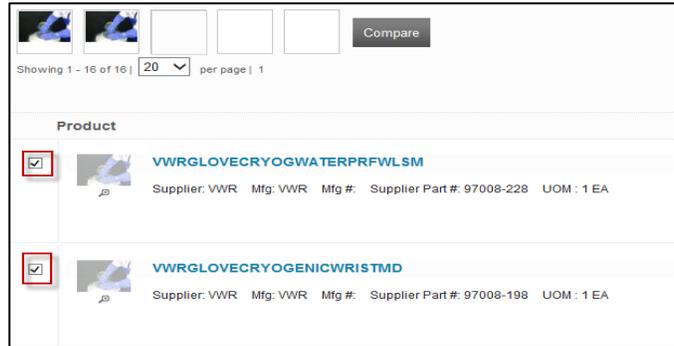


An additional pop up will appear tell the user that “The Current search has been added to your Favorites List”.



Comparing Items

Regardless of the search that is being done after pulling items they can be compared. To compare the item either drag the item image into one of the blank compare boxes, or check the box next to an item. Then click the compare button.



Comparing items will show more details about each item so you can more closely examine the differences between the items. From this screen you can either click Add To Cart or you can return to the search results.

Logging Out

To log out of TNSmartShop without bringing any items into the requisition, click on the Logout link in the top right corner.



My Settings

Click on the [My Settings](#) link to be brought to the Preference screen. This screen will allow the user to adjust settings. Confirm that the settings are set as below if you are missing any of the items mentioned in this training.

Preference	
Search Types	
<input checked="" type="checkbox"/> Product Keyword	<input checked="" type="checkbox"/> Supplier Part #
<input checked="" type="checkbox"/> Manufacturer Part #	<input checked="" type="checkbox"/> Buyer Part #
<input checked="" type="checkbox"/> Search Internal Catalogs	
Menu Settings	
<input checked="" type="checkbox"/> e-Forms	<input checked="" type="checkbox"/> Quick Order
<input checked="" type="checkbox"/> Favorites	<input checked="" type="checkbox"/> Packages
<input checked="" type="checkbox"/> Saved Carts	<input checked="" type="checkbox"/> Use Default PCard
Default Settings	
Default Search Type:	Product Keyword
Default Search Results View:	Condensed View
Default Language :	English
Default Search Page View:	Simple Search

Using TNSmartShop to view State of Tennessee Contract Documents

From the TNSmartShop home screen click on the **State of Tennessee Master contract page** to access a listing of available Statewide Contracts. The following information can be accessed from this screen: Terms & Conditions, Specifications, Additional Attachments, Contact Information, and the Signed Contract.

State of Tennessee Contracts			
RSWC 3004 IBM AS 400 Equipment Management			
Terms & Conditions	RSWC 3004 T&C		
Specifications	RSWC 3004 Specifications		
SWC Miscellaneous			
Supplier Name	Contact Information	Signed Contract	Supplier Miscellaneous
Sirius	Contact Information	Contract	