Shopping 100

Prerequisites, Overview and Module Objectives

Prerequisites

Prior to starting this training, we recommend that you complete the following modules:

- Navigation for Shoppers (Registered Users)
- Personalizing
- Searching for Shoppers (Registered Users)

These modules will provide some valuable tools and helpful suggestions to assist you in Shopping in GoCM.

If you would like to take these modules before starting **Shopping**, please click on the **All Modules** link in the left navigation bar.

Module Overview

This module is designed to teach you the shopping cart component of GoCM. The numerical menu bar above this text indicates which section of the module you are in.

1. Prerequisite, Overview and Module Objectives
2. Step-by-Step process with screen shots and demonstrations
3. Review and Try it Now
4. Helpful Tips and other Job Aids

While you can skip menu items, we recommend that you follow the natural progression of the module as it will help you better understand how to work in the GoCM.

Objectives of this Module

The Shopping Module is designed to assist you in creating a shopping cart from items in the GoCM Catalog. You will also learn how to modify your cart depending on what you want to do with it - for example, delete items, order, view, and/or maintain your cart.

A demonstration is incorporated in this module to show you how to use your shopping cart in GoCM.

The objectives of this module are to allow users to:

- Create a Shopping Cart
- Elements of the Shopping Cart
- Order a Shopping Cart

Additional shopping cart tips are provided in the Job Aids and Helpful Tips section of this module. This includes information on:

- Search and View an existing Shopping Cart
- Maintain a Shopping Cart
- Holding a Shopping Cart
    - o   Maintain a Personal Template
- Printing/Saving a Shopping Cart

Step-by-Step Process with Screen Shots and Demonstrations

The following scenario will be used throughout this module to help you learn how to use the GoCM shopping cart:

- You need to place an order for two different items: a monitor and cable. To proceed with this order, you need to first create a shopping cart.

Table of Contents

Creating a GoCM Shopping Cart

You can create a shopping cart using the following methods:

- Search for items in the GoCM catalogs. To search for items in a catalog, click on the catalog you want to use. You can search for items here and add them to your shopping cart
- If you have not been able to find anything suitable in the catalogue, you can enter a description of the required goods and services. Click on the **Describe Requirement** link and fill out the non-catalog requirement form.
- Or you can transfer items from your old shopping carts, purchase orders or your personal templates. First, click on **Old Purchase Orders and Templates** and search for the required shopping cart using search criteria like shopping cart name or item description. To search for items in your held shopping carts select status Held. To search for items in your personal templates select status **My Personal Templates**. Then add individual items or the entire shopping cart to your new shopping cart.

As demonstrated in the image below, click My GoCM to access My GoCM catalog. In the catalog box go to the **Find** field and enter **Toner Cartridge for Fax** and click **Go**.
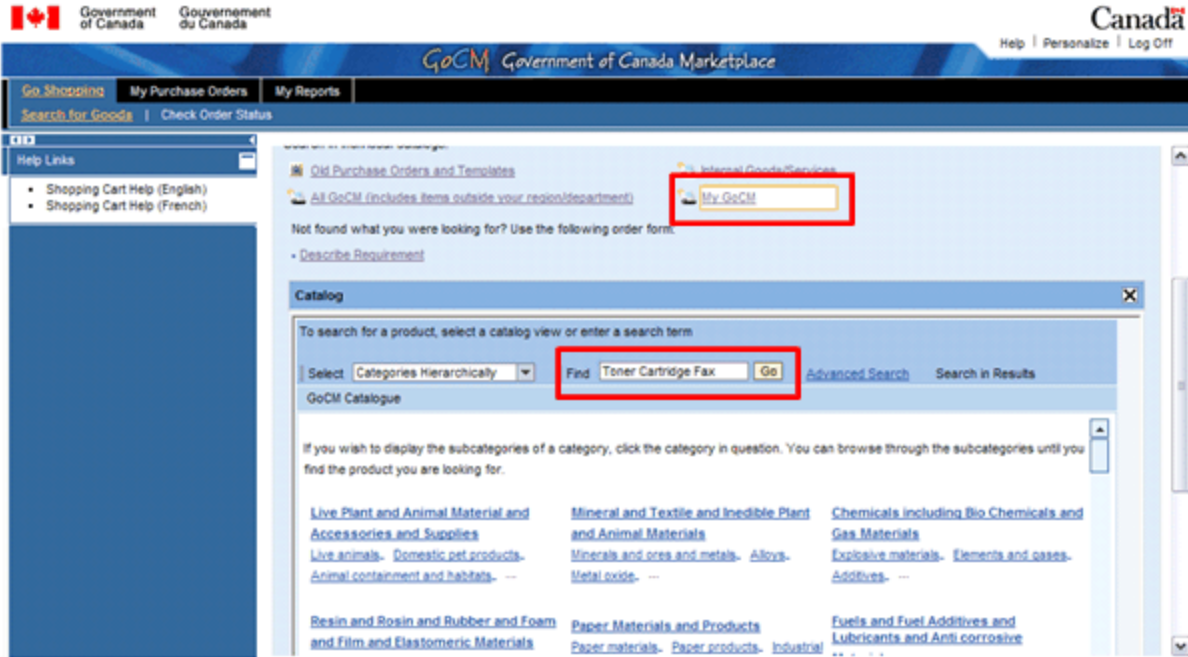
Once the search items appear, select which item(s) you want to add to your shopping cart by clicking on the blue square in front of the quantity column. You can select as many items as you want as illustrated below.
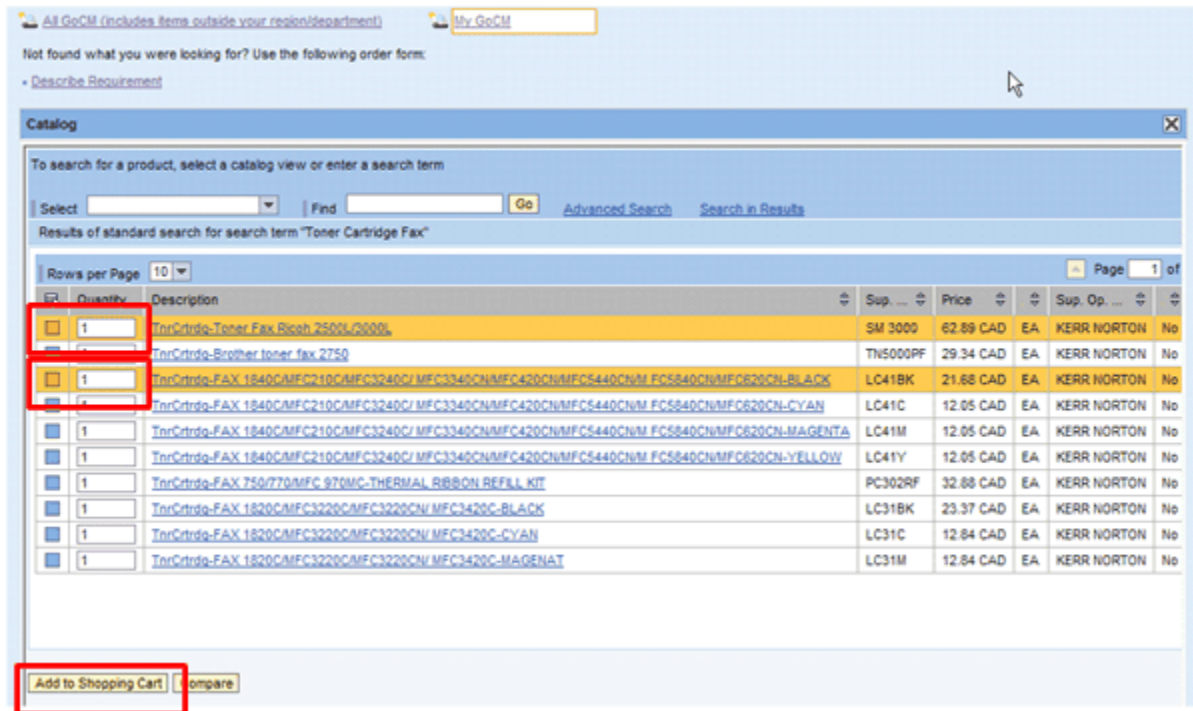
When your item is highlighted, you can create a shopping cart in two ways:

- If you have multiple items highlighted, you can simply click on the **Add to Shopping Cart** button at the bottom left hand side of the table. As demonstrated in the above image; or,
- Slide the horizontal scroll bar across to the end of the table and click on the **Shopping Cart** icon to add the item to your shopping cart as shown in the graphic below.

Quantity	Description	Sup. ... ⇕	Price ⇕	⇕	Sup. 0p. ... ⇕	⇕	Actior
1	TnrCrtrdg-Toner Fax Ricoh 2500L/3000L	SM 3000	62.89 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-Brother toner fax 2750	TN5000PF	29.34 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN-BLACK	LC41BK	21.68 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN-CYAN	LC41C	12.05 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN-MAGENTA	LC41M	12.05 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN-YELLOW	LC41Y	12.05 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 750/770/MFC 970MC-THERMAL RIBBON REFILL KIT	PC302RF	32.88 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1820C/MFC3220C/MFC3220CN/ MFC3420C-BLACK	LC31BK	23.37 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1820C/MFC3220C/MFC3220CN/ MFC3420C-CYAN	LC31C	12.84 CAD	EA	KERR NORTON	No	🛒
1	TnrCrtrdg-FAX 1820C/MFC3220C/MFC3220CN/ MFC3420C-MAGENAT	LC31M	12.84 CAD	EA	KERR NORTON	No	🛒

Shopping Cart   Compare

Once you have added your item to the shopping cart, you will notice that the **Shopping Wizard** has moved to step 2 of the shopping process. You are now in your **Shopping Cart** and have one item in it.

To add more items to your shopping cart, click on the number *1* hyperlink in the Shopping Wizard or click on the **Back** button at the bottom right hand corner of the screen to go back to select additional goods and services. In the case of this scenario, go back and select a **Monitor** and add it to your shopping cart.

Elements of Shopping Cart

In your Shopping Cart below you will notice many tables, icons and buttons. This section will describe those items in detail.

Under **Items in Shopping Cart**, you have several fields which are described in further detail below.

1. **Good/Service:** Holds a Product ID (for products in own inventory).
2. **Description:** More information about this field is in the following section.
3. **Category:** This identifies the UNSPCP category to which your item belongs.
4. **Required on:** The date when you need the item.
5. **Quantity:** The number of that particular item you need.
6. **Price/Limit:** How much the item costs per unit of measure.
7. **Action:** These icons allow you to view or complete some actions related to that shopping cart line item. They are further described below.

You can click these **Action** icons to get further information about your product or order, or to complete a task.
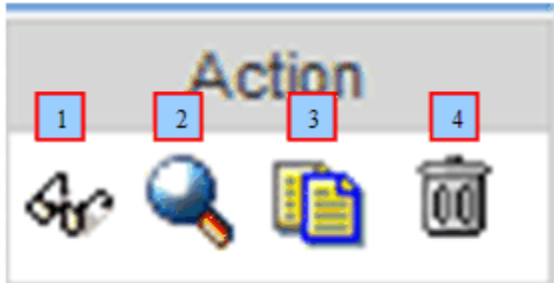
1. Clicking on the glasses opens up a new window with product details from the catalog.
2. Clicking on the magnifying glass provides order information related to the product, including basic product information, cost assignment, documents, shipping information, and source of supply. This information appears below the shopping cart. This icon is the same as clicking on the **Description** link in the shopping cart.
3. Clicking on the two pieces of paper indicates **Copy**. Use this if you wish to copy a line item without having to search for the product in section **1**.
4. Clicking on the trash can allows you to delete that particular line item.

The Description Field

When you click on the **Description** link or magnifying glass, details about that line item order appear below the shopping cart as you can see in the image below.

The contents of each section are described in further detail below:

Item Details: TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF

1 ▸ Basic Data

2 ▸ Cost Assignment

3 ▸ Documents and Attachments

4 ▸ Ship-To Address/Performance Location

5 ▸ Sources of Supply / Service Agents

1 - Basic Data: As demonstrated in the image below, you will find details about the product and ordering information. Your default information in **Personalizing** will appear in this section. If you need to change any information, you can use the various drop down menus to use the other settings you have saved in your **Personalizing** section.

Note: Since GoCM is not completing shopping transactions, procurement card information will not be stored; therefore, the **Procurement Card** drop down field is not functional. However, if you are using a procurement card to purchase the items in your shopping cart, simply click on the **P. Card Indicator** to identify that a procurement card was used for this purchase. This check box will also appear on your purchase order.

▼ Basic Data

You can change basic data. Changes are accepted automatically.

Description	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF
Product Category	Printer and facsimile and photocopier supplies
Company Code	0127 ⌄
Location	⌄
Purchasing Group	PWGSC Purchasing Group ⌄ 🔍
Order Quantity	10 each
Price	21.68 Canadian Dollar Per 1 each
Required on	11.12.2006 🗐
Tax	Sales Tax
Tax Amount	13.01 Canadian Dollar
Vendor Product Number	LC41BK
Supplier	252 1021076 ONTARIO INC
Procurement Card	⌄
Goods Recipient	User2 Shop2 ⌄
P. Card Indicator	☑
Tax Exemption Number	1006232210TQ0001SS
Manufacturer Name	

PRODUCT DESCRIPTIONS

|	
English Description	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF
	Toner Cartridge -FAX 1840C/MFC210C/MFC3240C/
	MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN - BLACK
French Description	Cartouche de toner -FAX 1840C/MFC210C/MF
	Cartouche de toner -FAX 1840C/MFC210C/MFC3240C/
	MFC3340CN/MFC420CN/MFC5440CN/M FC5840CN/MFC620CN-NOIR

PRODUCT ATTRIBUTES

UNSPSC	44103105
GSIN	N7510

2 - Cost Assignment: As you can see in the image below, this section shows who bears the costs for this line item.
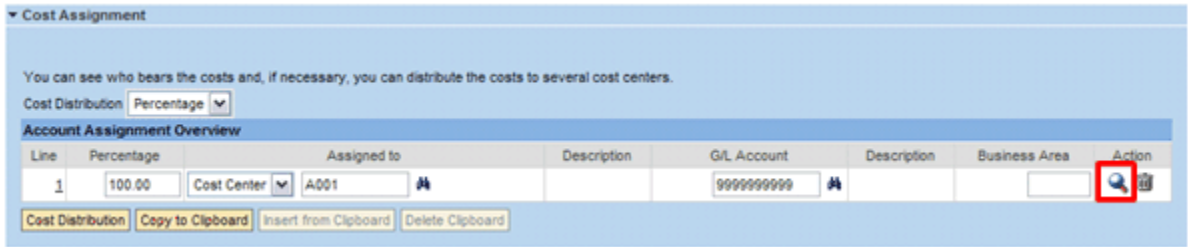
You can view details about this cost assignment by clicking on the magnifying glass. The screen below is what you will see as a result.

Again, the information shows the default information in the **Personalizing** module.

If you have multiple items in your shopping cart that require the same cost assignment information, you can click on the **Copy to Clipboard** button as shown in the graphic below. This will copy all fields in the cost assignment section.
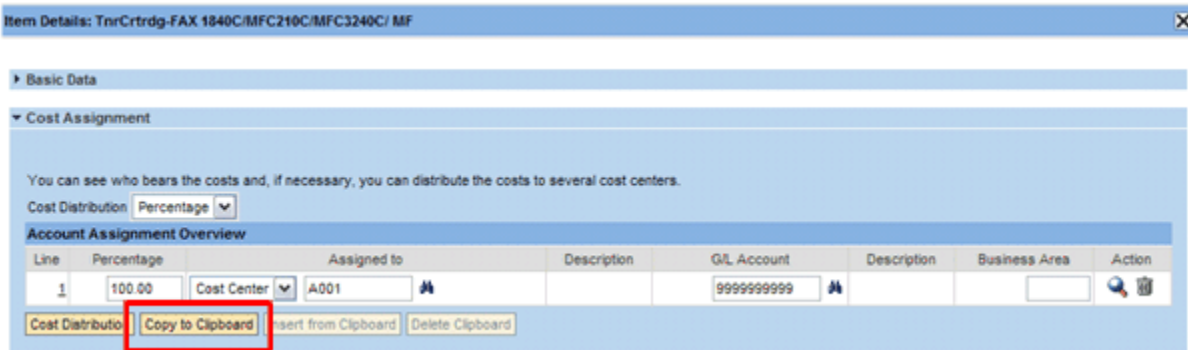
There are two ways to make quick changes to the cost assignment of items in your shopping cart:

- You can either select the checkbox **Change all items in Document** to assign this costing arrangement to all items in your shopping cart as demonstrated below; or,
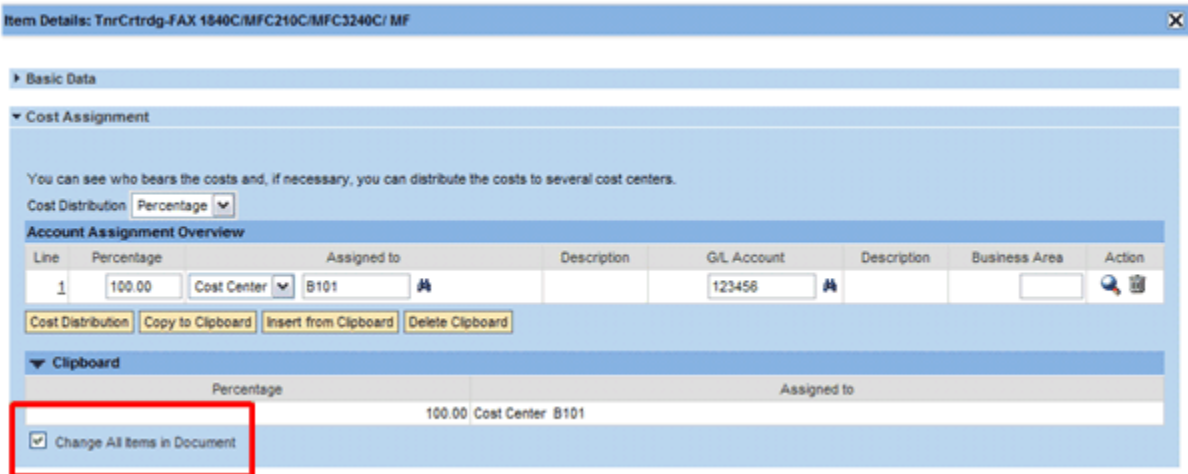
- Go to the details of each line item of your shopping cart where you want this cost assignment and click on the **Insert from Clipboard** button.

Click on **Back to Account Assignment Overview** to view your cost assignment.

3 - Documents and Attachments: You can also provide attachments; however, since GoCM is not yet an end-to-end system, the vendor(s) will not receive the document(s) unless you print and send them with the Purchase Order. For now, you can upload a document to maintain a historical record of your shopping cart/purchase order.

You can browse your computer to find the document(s) you want to attach.

4 - Ship-To Address/Performance Location: The screen below shows the address where the item will be shipped. It is the address in **Personalizing** that was selected as your default. You can change the address in this section by clicking on the binoculars.

Note: To save you time and effort, if your entire shopping cart is intended to go to a different delivery address than your default address, make the change in **Personalizing** so that you do not need to manually change every line item in your cart.

▼ Ship-To Address/Performance Location

If the item is to be delivered to a different address, you enter the new address here.

Note: If you enter address data here, Name and Country fields are mandatory

Name	0127
Other Name	PWGSC / TPSGC
c/o	EN450
Telephone Number	999-9999
Fax	
E-Mail Address	pwgsc@pwgsc.com
Building	
Floor / Room	
Street/House Number	11 LAURIER ST
Postal Code / City	K1A 0S5 Gatineau
District	
Postal Code / P.O. Box	
Country	Canada
Region	Quebec

[Undo Entries]

5 - Source of Supply/Service Agents: This section, as shown in the graphic below, shows the vendor from which you will be ordering your product.

Order the Shopping Cart

Before completing your order, you can do a couple of checks to ensure everything is fine. The image below identifies these checks.

Clicking on the **Refresh** button ensures all the changes you made to the shopping cart are incorporated.

Clicking on the **Check** button checks your shopping cart and provides error or warning messages based on the details of your cart.

If your shopping cart is free of warnings/errors, you will receive a message like this:
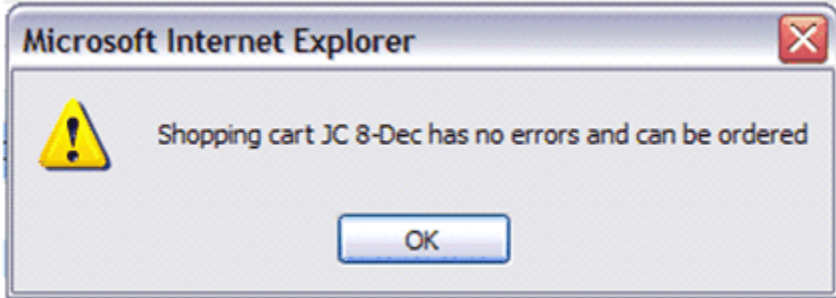
Click **Ok** to continue.

If you do receive a warning/error message, you will be told which line item needs attention. Make your changes as required and check your work again.

Now, to complete the shopping process, click on the **Continue** button.

The next screen, as shown in the graphic below, allows you to name your shopping cart so you can access the cart at a later time if necessary.

The default name is your user name followed by the date and time of the creation of the shopping cart.

You can also add any notes for approvers of your shopping cart in the space provided.

In this section, you can also view who is responsible for approving the shopping cart by clicking on the **Approval Preview** hyperlink.

If you decide to **Hold** your cart, this will save your cart for access at another time.

If you frequently order certain products, simply add those items to your shopping cart and save it as your personal template.

If you wish to save your work every so often, you can click on this button and then click on the **Back** button to continue shopping.

Once you are happy with your shopping cart, you can click on **Order** to create your cart.

Note: You must ensure you get a message that states that your shopping cart is either held or ordered. If you do not wait for this message, you may risk losing your work. Below is an example of the notification message you will receive for holding, creating a template and ordering your shopping cart.

Action performed successfully

Back to Status

Shopping Cart Created with Name/Number: JC 8-Dec / 1000001446

🛒 4 Items in Shopping Cart

Goods/Services	Description	Quantity	Category	Required on	Value
	TnrCrtrdg-Toner Fax Ricoh 2500L/3000L	10 each	Printer and facsimile and photocopier supplies	11.12.2006	628.90 CAD
	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF	10 each	Printer and facsimile and photocopier supplies	11.12.2006	216.80 CAD
	TnrCrtrdg-Toner Fax Ricoh 2500L/3000L	10 each	Printer and facsimile and photocopier supplies	11.12.2006	628.90 CAD
	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF	10 each	Printer and facsimile and photocopier supplies	11.12.2006	216.80 CAD
				Total Value (Net) :	1,691.40 CAD
				Tax Amount :	101.48 CAD
				Total Value (Gross) :	1,792.88 CAD

You can now print the shopping cart or display additional information, using the Check Status function
You can display whether the shopping cart has been approved or whether a purchase order has already been created
Print Shopping Cart
Check Status
Create new Shopping Cart

When your shopping cart is ordered, the following screen will appear. It outlines each line item of your cart, including the total value of your shopping cart.

Government of Canada   Gouvernement du Canada   Canada

Help | Personalize | Log Off

GoCM Government of Canada Marketplace

Go Shopping | My Purchase Orders | My Reports
Search for Goods | Check Order Status

Action performed successfully

Back to Status

Shopping Cart Created with Name/Number: JC 8-Dec / 1000001446

🛒 4 Items in Shopping Cart

Goods/Services	Description	Quantity	Category	Required on	Value
	TnrCrtrdg-Toner Fax Ricoh 2500L/3000L	10 each	Printer and facsimile and photocopier supplies	11.12.2006	628.90 CAD
	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF	10 each	Printer and facsimile and photocopier supplies	11.12.2006	216.80 CAD
	TnrCrtrdg-Toner Fax Ricoh 2500L/3000L	10 each	Printer and facsimile and photocopier supplies	11.12.2006	628.90 CAD
	TnrCrtrdg-FAX 1840C/MFC210C/MFC3240C/ MF	10 each	Printer and facsimile and photocopier supplies	11.12.2006	216.80 CAD
				Total Value (Net) :	1,691.40 CAD
				Tax Amount :	101.48 CAD
				Total Value (Gross) :	1,792.88 CAD

You can now print the shopping cart or display additional information, using the Check Status function
You can display whether the shopping cart has been approved or whether a purchase order has already been created
Print Shopping Cart
Check Status
Create new Shopping Cart

At this point, you have also created your Purchase Order. More details regarding this topic are described in the **Purchase Order** training module.

To actually proceed with your order, you will need to go to your existing procurement tool(s).

Review and Try it Now

Review

In this module you learned how to create a Shopping Cart from items in the GoCM catalogue.

You also learned about the line item description field where product and ordering information could be found and modified if necessary.

Finally, you were shown how to order your shopping cart.

Additional training tips on GoCM Shopping can be found in the next section - **Helpful Tips and Other Job Aids**.

Further details on what to do with your ordered shopping cart can be found in our next module - The GoCM Purchase Order (Purchase Order 100).

Congratulations, you now have the skills to shop in the GoCM!

Try it Now

You now have the option to complete an exercise on your own in GoCM. Try this exercise on creating a shopping cart.

Log on to GoCM to complete this exercise.

You need to place an order for two different items: Plasma and Cable. To proceed with this order, you need to search for your items then create a shopping cart.

1. In the **Go Shopping** tab, click on **My GoCM**.
2. In the Searching **Find** field enter **Plasma**
3. In the resulting list, select the item you want and click on the shopping cart or the **Add to shopping cart** button.
4. To add your next item, click on the **Back** button and complete another search for **Cable**. Add this item to your shopping cart.
5. Once you are satisfied with all of your items in your shopping cart, click on the **Continue** button.
6. Name your shopping cart for easy retrieval.
7. Click on **Order** to create your shopping cart, **Hold** to save your cart, or **Create Personal Template** to save your cart as a template.
8. Wait until you receive a message stating that your shopping cart has been created.

Helpful Tips and other Job Aids

FAQs

- Where to search for items?
- How to search for an item?
- How to improve your search results?
- How to search by Supply Arrangement Number?
- How to compare characteristic values of several items side by side?
- How to complete an advanced search?
- How to search using free text?
- How to find a delivery address?
- How to change the delivery address?
- How to check status of shopping cart?
- How to enter vendor instructions?
- How to enter accounting data?
- How to copy and paste financial codes?
- How to describe a non-catalog item?
- How to name a shopping cart?
- How to hold a shopping cart?
- How to use a personal template?
- How to order a shopping cart?
- How to order for somebody else?
- How to order with Procurement Card?
- How to print a shopping cart?
- How to search for a shopping cart?
- How to view line item details?
- How are taxes calculated?
- How to find a purchase order from a shopping cart?