

Step by Step Guide to shopping in OrderPoint

OrderPoint is the computer system used in Derbyshire County Council to create orders for goods/services where exact prices are known. Shoppers create shopping carts which are approved and the purchase orders are emailed to the Vendor. Goods are delivered and receipted within OrderPoint, the invoice goes to the Accounts Payable department and the vendor is paid. There are three types of shopping carts: internal catalogue, punchout catalogue and freetext.

Creating shopping carts

For every type of shopping cart, click **Purchasing** then click **Shopping_Cart**

In the General Data section

- Enter **Name of shopping cart**. We recommend a meaningful name so you can easily identify this later eg **Shopper Initials–Vendor Name – Goods – DD/MM/YY**
- Add a note to Approver in **Approval Note** (if required). (Where Governors approval has been given, the minute number must be recorded here).
- Enter **cost centre** or **SIO** by clicking on **Set Values** within the **Account Assignment** tab. (These can be split by percentage, value and quantity).
- In **Delivery Address** tab, if **required**: In Other name overtype *Derbyshire County Council* with "FAO xxx" (the person needing the items)

1. Free text shopping cart

- Click on **Add Item**, click **With Free Description**

In the pop up window, complete the fields for your first item:

- **(Product type: Material – do not change this)**
- **Description:** Enter a brief description of the item including catalogue/product number
- **Product Category (GL code):** click in the search square, click **Start Search** to view complete list of GL codes. Click your selected code
- **Quantity/Unit:**
 - **Quantity:** Enter quantity
 - **Unit:** (first time entry) click on search square, then click **Search** to bring up complete list, select **EA**. (Subsequent entries, type in **EA**)
- **Net Price/ Currency:** Enter net price of item / **GBP**
- **Delivery date:** will be 7 days' time unless you select date
- Click on **Add to Item Overview**

Tip: **ALWAYS** ensure that the price is accurate. Don't forget to add a line item for any delivery charges.

Adding the Vendor

- Click on **Details**
- Click on **Sources of Supply/Service Agents** tab
- Click in **Supplier** search box (not Preferred Supplier)
- In **Search Term 1**, type in all/part of the Vendor name

Tip: using **asterisk** at start/end of name can assist with search

- Click **Search**
- Click on the required **Vendor name** – this populates the Supplier field
- Click on **Assign Supplier**
NEVER search for a Vendor using the vendor number as this number could be blocked. OrderPoint will allow you to create the cart but the purchase order will not go to the Vendor.

2. Internal catalogue

- Click on **Add Item**, click **Schools Catalogue**
- The catalogue displays with available vendors
- Tick the required **Supplier**
 - Enter the **product code** (if known) or description of item into **Keyword** field
 - Click **Search**

Tip: use asterisks to bring up related items if exact item/code is not known.

- **Tick** the required item(s), enter **quantities**
- Click **Add to cart**
- When all items have been selected, click **Cart Preview**
- Here you can see details including pre-selected GL codes
- Click **Transfer Items**

Your shopping cart items are displayed.

3. Punchout catalogue

- Click on **Add Item**, click on your preferred **punchout catalogue** eg **ESPO, YPO, Lyreco, ARCO**
- The Vendors website displays
- In the **Search** field, find your items by typing:
 - the product/catalogue code
 - product type
 - keyword , then clicking **Enter**
- Enter your required **quantity** of the item, click **Add to basket**
- When you have completed shopping, click on **View Basket**
- If all items are correct, click on **Proceed/Continue to checkout**

You are taken back into your shopping cart with your selected items displayed.

Duplicating a Line Item – free text only

If you have more than one item in your order and/or a delivery charge, use the Duplicate line facility. This copies all details of the line, including the Vendor and any notes and attachments. Then you can amend the product description, price, quantity in the duplicated line, as required.

- First click on **Check** – to check for errors
- With the required line highlighted, click on **Duplicate**
- **A duplicate line displays**
- Highlight this line and click **Details**
- The **Item Data** tab is where you can amend the Description, price, quantity, Product category* (GL code)
- Click on **Check** updates the line item's information – and checks again for errors

Tip: If you change the ***Product category** or **Unit of measure**, the **Vendor details** are removed and will have to be re-input.

Adding a note or attachment

Only the Vendor text notes appear on the Purchase order (not Approval Notes) and attachments go to the Vendor with the purchase order.

- With the relevant line item of the order highlighted, click **Details**
- In the **Notes and Attachments** tab:

To add a note:

- Click on **Vendor Text**
- Overtyping the existing text with your note/instruction. This will not delete the line item information.

To add an attachment:

- Click on **Add Attachment**
- Click **Browse** to navigate to the saved document's location
- **Double click** on the file name
- Type a **Description** if required
- Untick the checkbox **Visible Internally only**
- Click **Ok**

For every type of shopping cart - when you are ready to order

When your cart is complete, **ALWAYS** click on Check to check the cart for errors

- Click on **Order**

This sends the shopping cart to your approver(s) for approval.

- Click **Close**

Viewing the Purchase Order of approved

Shopping Carts

PO numbers can only be found when the order has been approved.

- Click on **Home-School Shopper**, then on **Shopping Area**
- Highlight **Shopping carts** in the **Active Queries** line, click **Refresh**
- If your shopping cart doesn't show, click **Show Quick Criteria Maintenance**, select your search options eg shopping cart number, click **Apply**
- Click on the required **Shopping Cart Name/number**
- In the shopping cart, click on **Details**
- Click on **Related Documents** tab (you may have to click on the >I arrow to view this)

The **PO number begins 65...**

- Click on the **PO number**
- To view the pdf copy, click **Print Preview**
- **Close** out of the pdf
- To view the date sent and vendor email address, click **Header**, then **Output**

Identifying the Numbers Used in OrderPoint

There are set number prefixes to allow easy identification of what point your order is at.

Shopping Carts start with 100..

Purchase Order (PO) start with 65..

Confirmations start with 32...

Invoices/AP's start with 51.....



Order
Check
Sources of Supply
Notes & Attachments
Delivery Date
Price & Quantity
Product Category - GL code
Item description
Add Item
Account Assignment & Delivery Address
Name cart/Add approver to