Wish Lists in TxSmartBuy

Orders against TXMAS contracts and certain Term contracts require the creation of a wish list in the TxSmartBuy system prior to creating a PB7 or PB8 requisition in POINT Plus. Follow these steps to determine if a wish list is needed:

2. Click Contracts on the upper right-hand side of the page.
3. Use the Contract Number column to locate a specific contract.
4. Use the Contract Category column to determine if a wish list is required.
   • If Managed or CCG is listed, the order can be processed on a POINT Plus PB4 requisition following standard procedures. Disregard the remaining steps because a wish list is not required.
   • If TxSmartBuy is listed, the order must be entered into the TxSmartBuy system.
5. Use the Contract Type column to identify if the contract is a Term contract or a TXMAS contract. Follow the instructions below for the appropriate type of contract.

TIP: Use the TxSmartBuy Online Ordering System User Guide and TXMAS Quote Processing Instructions on the TxSmartBuy website for additional help with creating wish lists and orders.

Create a Wish List in TxSmartBuy for a Term Contract

1. Click the contract number in the Contract Number column on the TxSmartBuy Contracts page to view the details of the contract.
2. Click the Search for items in this contract button to locate a list of items included in the contract.
   • Searches can be further defined by item category, contract number, and various filters on the left navigation bar.
   • If a search doesn’t yield the needed item, work with the vendor to have the item added to the catalog.
2. Once the needed item has been found, click Add to Wish List to add the item to your virtual shopping cart.
   • When purchasing certain items, customize an item by selecting various item attributes, such as item color, size, finish, and more.
   • Predefined charges associated with specific contract items may appear as a drop-down list on the “Charges” tab in the Additional Charges area of the Add Item to Wish List view. Some examples of “Charges” include freight, installation or removal, and inside delivery.
3. In the Quantity field, select the required quantity and click Add to Wish List.
4. The Added to Wish List pop-up window displays.
   • If additional items are required, click the Search for More Items button to continue shopping (repeat steps 2-4).
   • If shopping is complete, click the View Wish List button to complete the wish list.
5. Once shopping is complete, select **Export Wish List to PDF** or **Print** to get a copy of the wish list to aid in the creation of the PB7/8 requisition.

6. Click the **Share** button at the top left-hand side of the page to email the wish list to yourself. Choose option 1 to open an email window or option 2 to copy and paste the link into an email. **Note:** This step ensures the wish list is retained even if the shopping session is closed. Keep this email until you are ready to contact your Buyer Team with order details.

7. Go to POINT Plus and create a new requisition with PB7 or PB8 as the Purchase Order Type. The POINT Plus purchase order should mirror the vendor quote.

8. Once the POINT Plus document has been created, email the wish list link (the one that was emailed to you), POINT Plus doc ID number, and any supporting documents to your **Buyer Team** for processing.

9. Once the buyer has received the wish list link and the corresponding PB7/8 requisition, he or she can complete the order. Buyers will return PB7/8 requisitions that do not have corresponding wish lists.

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**Create a Wish List in TxSmartBuy for a TXMAS Contract**

Prior to creating a wish list for a TXMAS order, contact the vendor to determine which items are on contract and which are considered incidental or open market items (if any).

1. Click on the contract number in the **Contract Number** column on the **TxSmartBuy Contracts** page to view the details of the contract.

2. Click the **Search for Items in this contract** button to locate a list of items included in the contract.
   - Searches can be further defined by item category, contract number, and various filters on the left navigation bar.
   - When searching for items on a TXMAS order, for any items matching the quote, add them to the order as needed.
   - For certain TXMAS contracts, create the wish list utilizing a generic line item in TxSmartBuy. There should be a Quote line item (TXMAS_______Quote-Contractor Name) for the appropriate manufacturer. The unit price is $1.00.
   - If a search doesn’t yield the needed item, work with the vendor to have the item added to the catalog.

3. Once the needed item has been found, click **Add to Wish List** to add the item to your virtual shopping cart.
   - When purchasing certain items, customize an item by selecting various item attributes, such as item color, size, finish, and more.
   - If you located the specific item that was needed, in the **Quantity** field, select the required quantity.
   - If using a Quote line item, the total quote dollar amount for the product or services (Non-Incidental) must be entered as the quantity of the $1.00 item.
   - Choose a dealer, if applicable from the drop-down menu.
• TXMAS open market incidental charges must be entered on the TXMAS Incidentals tab along with a description. If there is more than one incidental charge on the quote (i.e., installation charge, freight charge etc.), enter more than one incidental change.

4. Once all the information has been entered, click **Add to Wish List**.

5. The **Added to Wish List** pop-up window displays.
   • If additional items are required, click the **Search for More Items** button to continue shopping (repeat steps 2-4).
   • If shopping is complete, click the **View Wish List** button to complete the wish list.

6. Once shopping is complete, select **Export Wish List to PDF** or **Print** to get a copy of the wish list to aid in the creation of the PB8 requisition.

7. Click the **Share** button at the top left-hand side of the page to email the wish list to yourself. Choose option 1 to open an email window or option 2 to copy and paste the link into an email.
   **Note:** This step ensures the wish list is retained even if the shopping session is closed. Keep this email until you are ready to contact your Buyer Team with order details.

7. Go to POINT Plus and create a new requisition with TXMAS Contract (PB8) as the Purchase Order Type. The POINT Plus purchase order should mirror the vendor quote.

8. Once the POINT Plus document has been created, email the wish list link (the one that was emailed to you), POINT Plus doc ID number, and any supporting documents to your **Buyer Team** for processing.

9. Once the buyer has received the wish list link and the corresponding PB8 requisition, he or she can complete the order. Buyers will return PB8 requisitions that do not have corresponding wish lists.