Step-by-Step Instructions for Ordering Items from a Dealer

1. Dealers are authorized Suppliers who can offer the State the items listed on the contract. For example, Lenovo would be the parent Supplier on a contract, but a dealer would be a Supplier that can offer Lenovo’s laptops to the State. Ohio Buys allows for multiple dealers to offer the same item as part of a single hosted catalog item. When you are looking at an item that has multiple dealers, Ohio Buys allows you to view the price history and solicit multiple dealers in order to determine which dealer can provide a lower price.

Log in to Ohio Buys. From the Main Menu Navigation bar, click Shop and select Browse Items from the drop-down menu.

2. The Browse Items page is displayed. On this page, you can enter a variety of search terms to find goods and services on Ohio Buys. For example, you can easily search by Keywords and State Contract Numbers. Enter search terms and click Search. By default, the search results on the Browse Items page are filtered to only show items that contain an item tag. An items tag indicates if an item is tied to a Mandatory First Requisite, Mandatory Second Requisite, or Mandatory DAS Contract. In addition, item tags also indicate if an item has Dealers or is linked to MBE Set-Aside contract. In order to search for items that do not have any tags, you must remove the item tag filters from your search terms.

3. On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s). Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the + or – symbol next to the shopping cart.

An item that is offered by multiple dealers will display as a single line item in the search results.

4. Once you have selected your item(s) and adjusted quantities, click Add selection to cart. Please note that in some scenarios you may be prompted to select a feature (e.g., color, size, etc.) for your item(s).

5. The specified item will be added to your shopping cart. To begin the checkout process, click Checkout.
The checkout page is displayed. Any fields with a red asterisk indicate a mandatory field that must be completed.

a) Update the **Requisition Label** using your agency’s agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is “Office Supplies JD”).

b) Select your **Organization**, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access. For example, if your profile is set up with access to one main organization or if you have identified a favorite main organization, this will default. Selecting your Organization will also automatically populate the **Business Unit** field.

c) Indicate if you would like receiving to be required in Ohio|Buys. By default, this field will auto-populate as **No**. If you select Yes, a receipt must exist in Ohio|Buys in order for any Supplier submitted invoices to be processed.

d) Select the requisition’s **Ship To** address. If you cannot find the shipping address, click the ‘+’ icon to provide a one-time delivery address.

▲ You should also update the **Attn** field with the name of the person who will be responsible for receiving the items, if applicable.

e) If necessary, enter and select any **Additional Agency Approvers**. If any Additional Agency Approvers are selected, one of these user will need to approve your purchase requisition before it is routed to your Supervisor (for Requesters) or your Agency Procurement Approvers (for Requisitioners).

f) Click **Save**.
Step-by-Step Instructions for Submitting a Hosted Catalog

Pcard Purchase

Step 7

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a) Select the **Budget Date**. The relevant fiscal year will populate in the **Fiscal Year** field.
b) Select the **Origin Code** based off the agency you’re purchasing for.
c) Expand the **Purchasing Options** section. Indicate whether the purchase requisition should be put on hold, and/or if it should not be encumbered. Note that orders from a dealer should not require one-time bids, single or sole source purchases, or DAS solicitation requests.

On the right side of the page, enter the **Request Description**, as well as any applicable **Comments to Supplier**. This information can be added at both the header and line item level.
9. Click the **Save** button.

10. ▲ If you need to add an attachment to the purchase requisition, consider the following information regarding the types of attachments:

   - **Internal Attachment**: Documentation, visible to State users, kept with the purchase requisition (e.g., internal emails, supplier quotes) helpful for future reference or approvals.
   
   - **Justification Document**: Documentation required when ordering an item on the restricted commodity list. The restricted commodity list is a list of commodities identified by the requisite procurement programs as goods/services that require their review before they can be purchased from a supplier that isn't a requisite procurement program.
   
   - **Supplier Document**: Documentation sent to the Supplier with the purchase order.

At the bottom of the main checkout page, you will see your individual line items. Click the **Pencil** (✏️) icon next to each line item to make your mandatory and/or optional additions to specific fields (e.g., supplier contact, ordered quantity, chartfield information, etc.).

▲ If you want to edit multiple line items at one time (e.g., mass add a supplier contact to multiple line items at once), complete the following:

a) Click the **Individual Checkbox Icon** next to the individual line items to select multiple individual line items or click the **Select All Checkbox Icon** above the line items to mass edit all the line items and then click the **Edit Lines** button.

2) To update the **Supplier Contact**, first select your Supplier from the **Supplier** field. Next, select the Supplier Contact from the associated drop-down menu. Please note, the Supplier Contact field is not mandatory and some Suppliers may not have a contact.

a) Click the **Add** radio button or **Replace** radio button for each of the fields you updated.

2) Click **Save & Close**.
Whenever dealers are available for an item, a non-blocking alert will be shown for the line item.

When reviewing the line item details for an individual line item, you can update information in the following sections by clicking the **Pencil (-pencil) icon**:

- **Describe the Item**: contains the **Ordered Quantity** and **Delivery Date** fields.
- **Select Supplier**: In some scenarios, you will need to select a Supplier Contact if the Supplier has multiple order contacts listed on their profile. If dealers are available for an item, expand the **Dealers Details** section and then click **Dealers Last Price Paid**. From the displayed pop-up window you will be able to see the price and Supplier history for the item. Once you have analyzed this information, you can update the **Supplier**, **Order Supplier**, and **Supplier Contact** fields in the Find or Add Suggested Supplier section to the dealer you would like to order from.
- **Pricing**: You are able to adjust the price for hosted and punch-out catalog items, as needed. Whenever you do adjust the price, you will also need to specify a Supplier Quote ID and upload a copy of the quote as a justification document.
- **Define Delivery Place**: If desired, you can define a different delivery place for each item.
- **Budget Information**: expand this section to add chartfield information for the line item.

▲ The information entered in this section is the same information you previously would have provided in OAKS. Requesters or Requisitioners are not required to enter chartfield information - this information can be updated until a Fiscal Agency Approver completes their review.

▲ Prior to entering any chartfield information, it is recommended you right-click on any of the column headers to customize which columns are displayed.
Once you are done making updates to the line item’s information, click **Save & Close**.

Continue making updates to any remaining line items. When you have successfully completed the mandatory and optional fields, as well as resolved any applicable alerts, click **Submit requisition**.

In some scenarios, a Requisitioner or Procurement User will want to complete the Quick Quote process prior to submitting a requisition. The action that is taken at this point is dependent on the details of the purchase requisition and our agency’s procurement policies. Please refer to the **Creating and Awarding Quick Quotes** course for details on the Quick Quote process.

After your requisition has been submitted for review, you can check its approval status at any time.

If you would like to print the details of your requisition, click the **Print** icon in the top right of the page.

To view the main agency approvers for your requisition, expand the **Workflow Main Approvals** section on the Header tab of the purchase requisition.

On the **Workflow** tab, you can see where your requisition is in the approval process. Steps in green are completed steps, while steps in orange are in progress. As action is taken on your requisition, the Approval History section on the bottom of this page will be updated with the names of the individuals who have taken action on the purchase requisition.

You will receive an email notification whether your purchase requisition is rejected or fully-approved. Once a purchase requisition is fully-approved, a purchase order will automatically be created and sent to the associated Supplier.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).