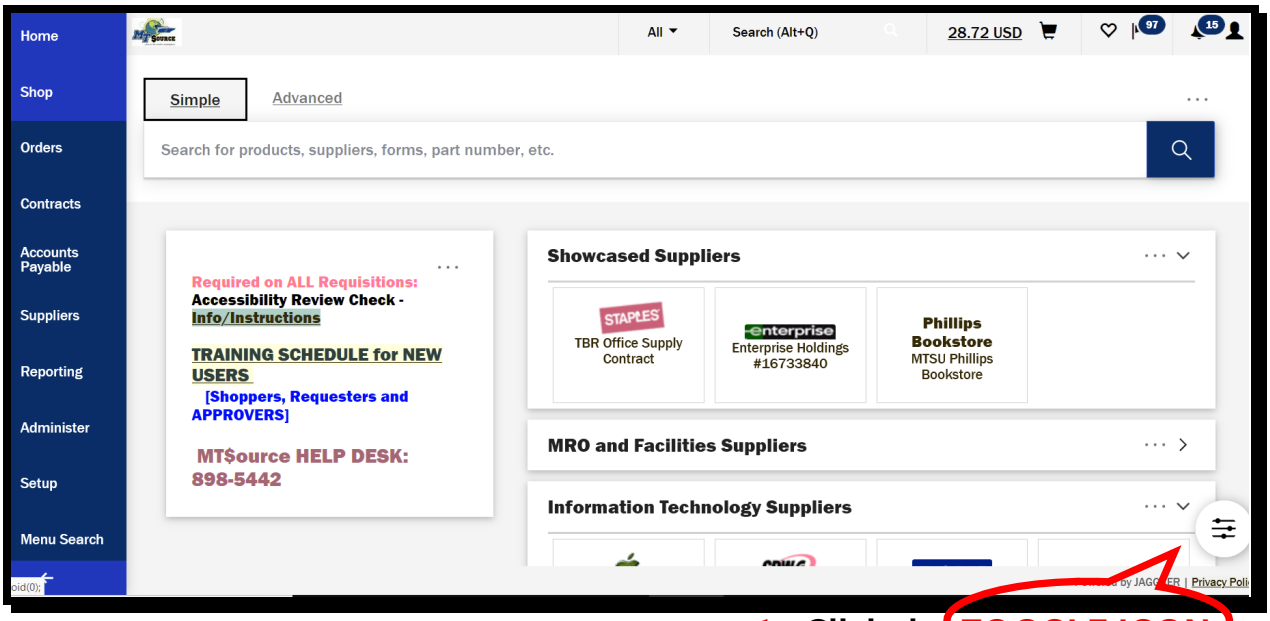
MT$ource NEW SHOPPING EXPERIENCE

Shopper and Requester: On **Wednesday, Sept. 1, 2021** MT$ource will roll-out the New Shopping Experience as a practice option. Users can toggle between the New Experience and the Classic Experience by clicking the icon in the lower right of the **Home Page.**

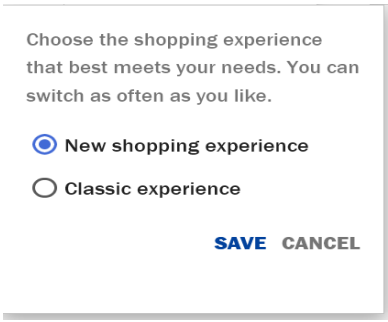
On **Monday, Nov. 1, 2021** the New Shopping Experience becomes permanent, and the Classic Experience will no longer be available.

The toggle icon is in the lower right corner of the MT$ource Home Page. Click to open the option window, select your choice, and click Save. Most computers will require a Refresh to activate the change. (The toggle icon may be seen on other MT$ource screens but the best way to assure the toggle change is to perform it while on the Home Page)



1 - Click the TOGGLE ICON
2 - Make your Selection
3 - Click Save.

Remember –
*On **Sept 1**, the **default** will be the **New Shopping Experience.** To return to the current Classic Experience, use the toggle option.*
The toggle option is temporary.
*On **Nov. 1**, the **New Shopping Experience** becomes permanent.*



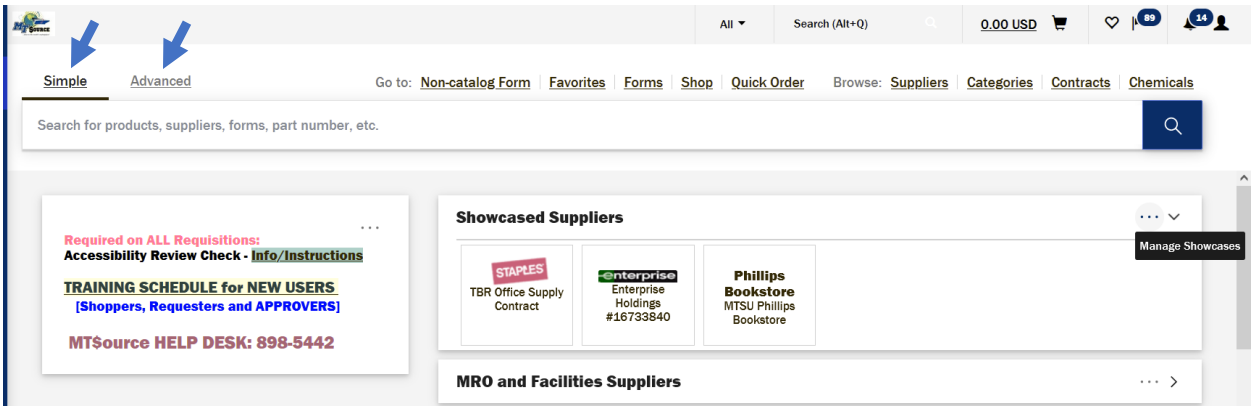
ICONS

These icons are displayed in the New Shopping Experience:

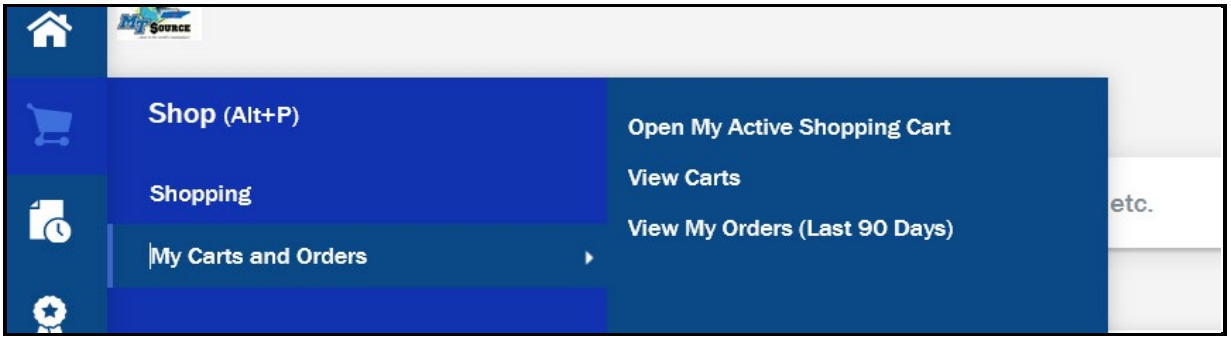
- Click to display additional options for items in a panel or page
- Click to edit information in a panel
- Collapse a section
- Expand a section
- Click to print the cart, requisition, purchase order or approval workflow

HOME PAGE

Let's look at the changes in the Home Page. In the top section of the Home Page, the location of the Simple and Advanced search options for catalog suppliers has a different look but the function to search the Hosted Catalog Suppliers remain the same.

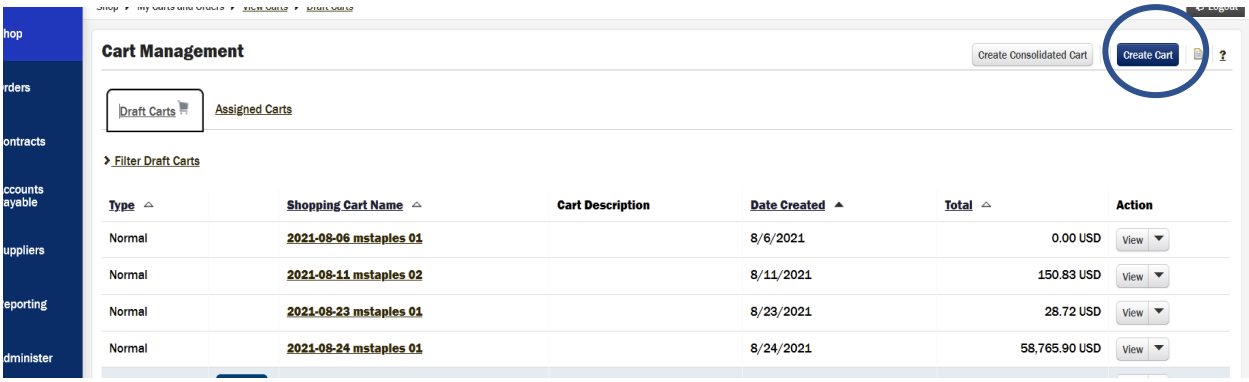


No changes were made to the blue navigation ribbon on the left side or with fly-out options.

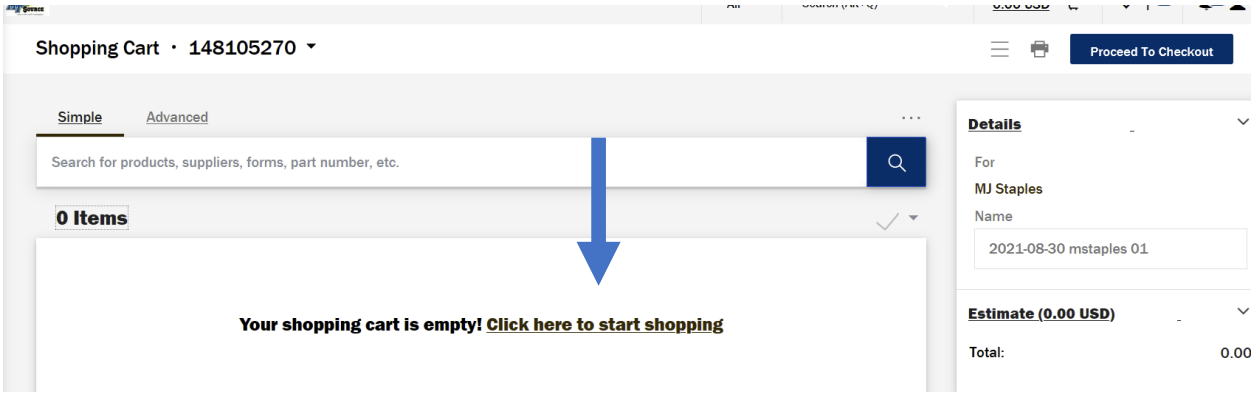


Create a New Cart

*When a fresh cart is needed, use the blue navigation ribbon, find **Shop > My carts and Orders > View Carts.** On the right, **Create Cart.***

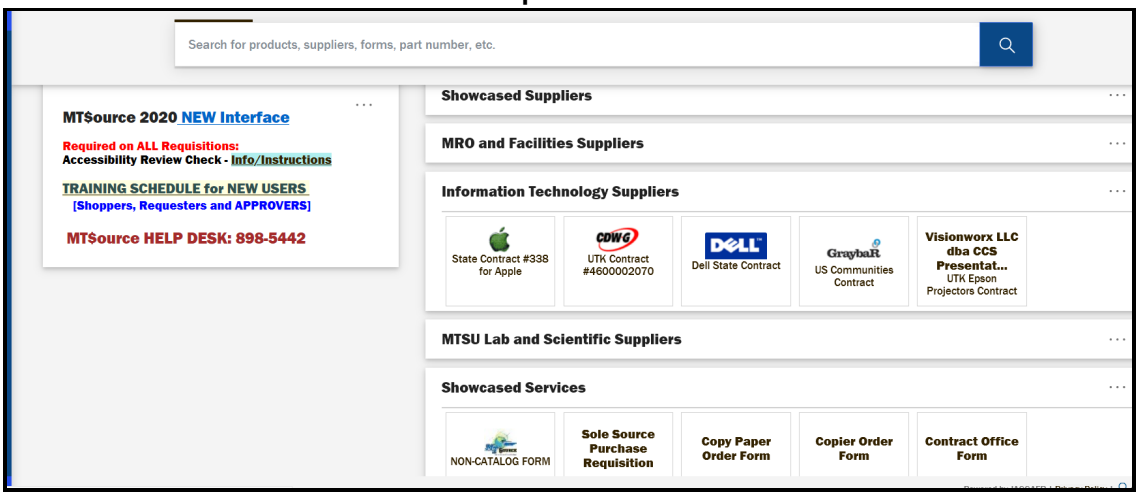


*An empty cart will open, 'click here to **'start shopping'** this will return to the Home Page with a new/fresh cart.*



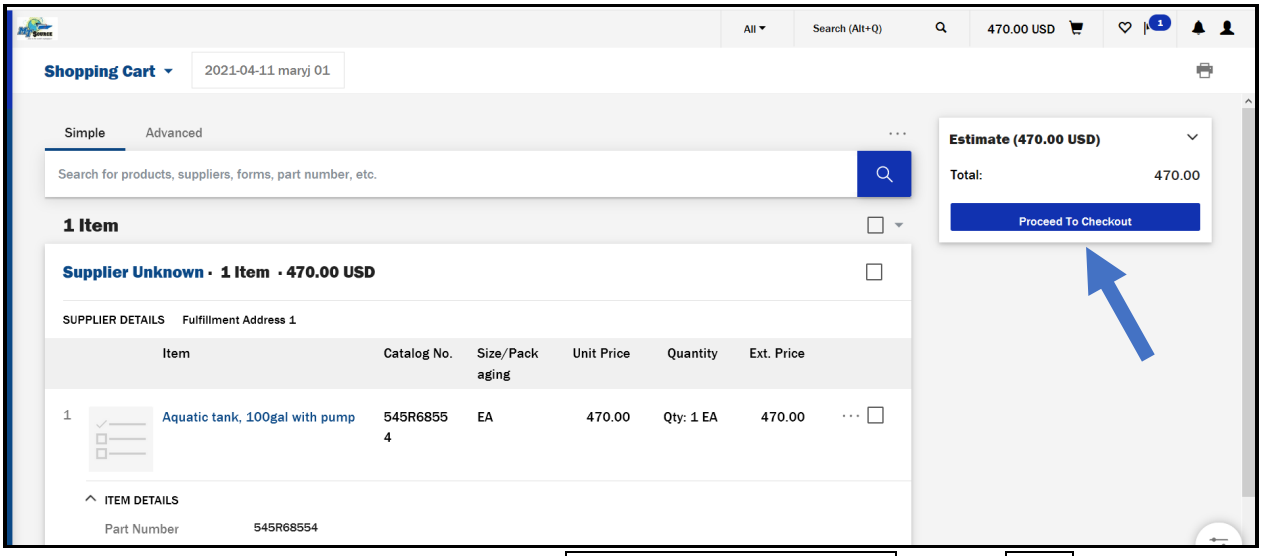
ORDERING WITH THE NEW SHOPPING EXPERIENCE

From the Home Page, select your shopping option. There are NO changes in the Forms - i.e. Non-catalog Form, Contract Office Form, Copy Paper Form etc. Click on their links and complete as normal.



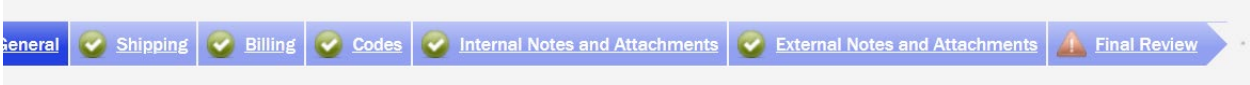
Once your Form or Punch-out is complete click 'Add and go to cart'. (Remember process the Form as normal as no changes were made)

Your cart screen will open the cart for review. After review and/or changes, click **Proceed To Checkout**.



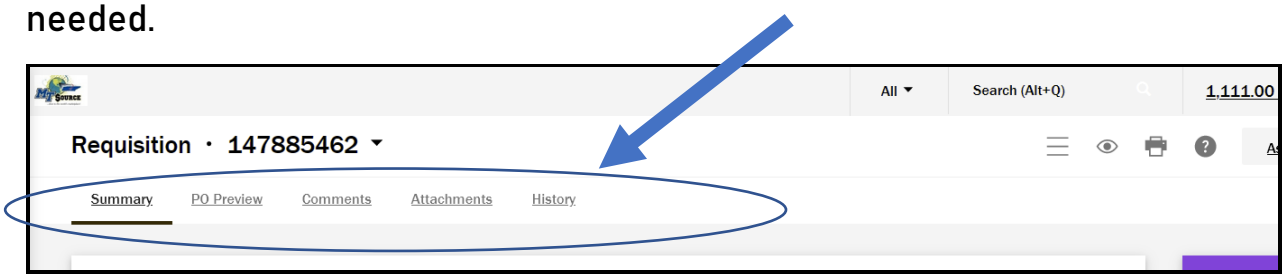
(To return to the Form, click on the Product Description or the box to the left of the Product Description.)

Instead of the navigation arrow that was used in the classical experience…

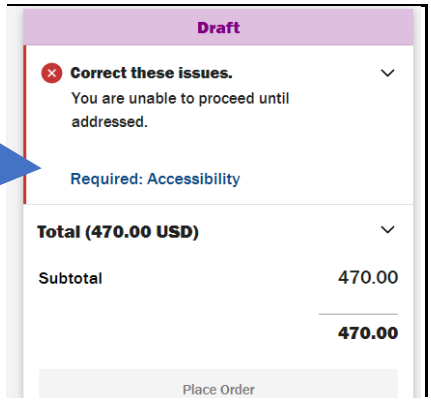


the New Shopping Experience presents all the requisition sections at once. (like what you would see in final review)

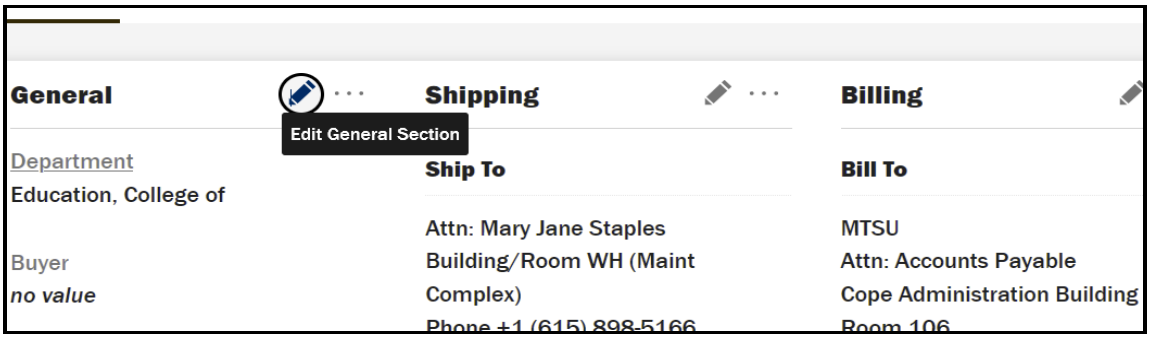
The sections are the same and tabs are provided for additional entries as needed.



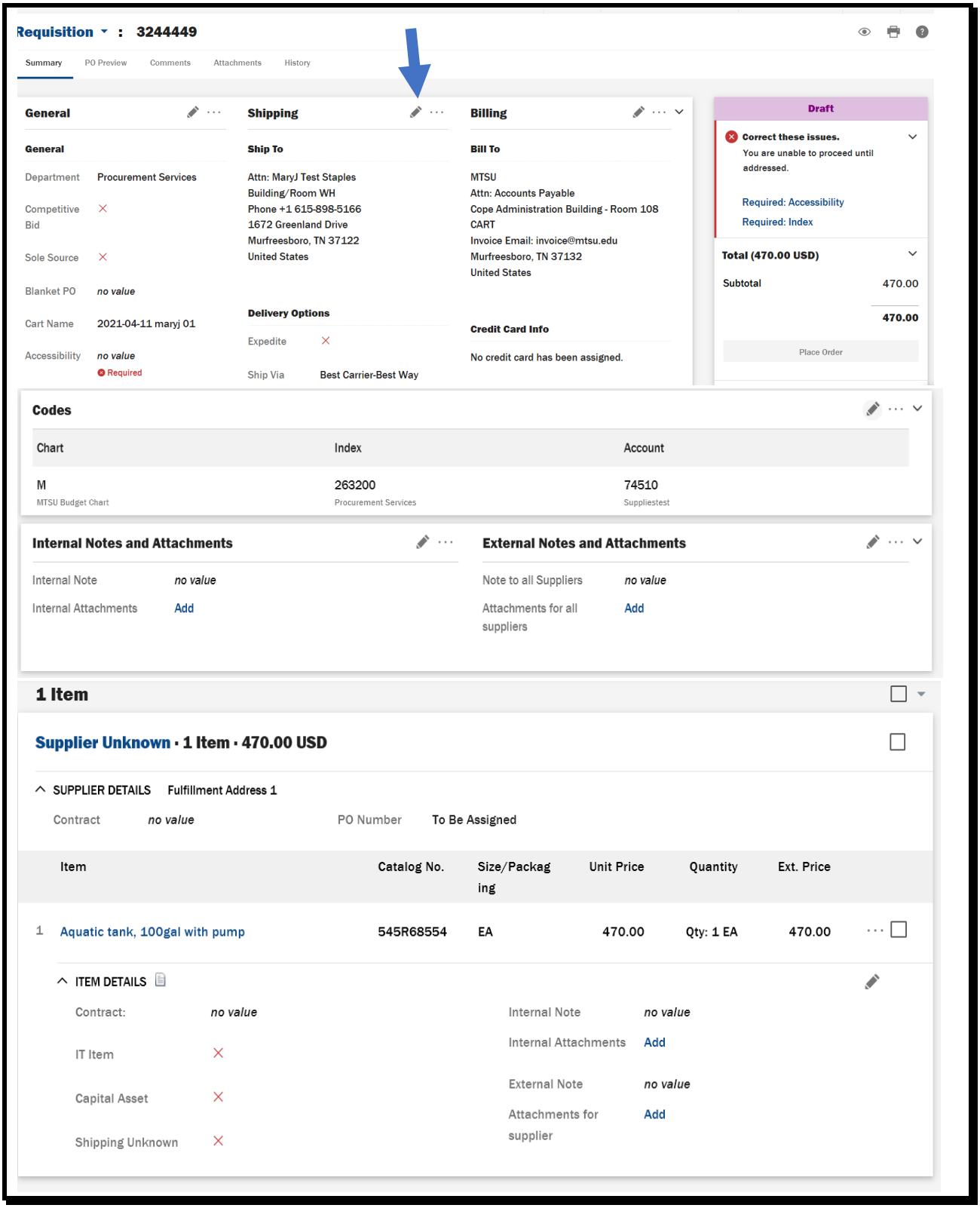
The section on the RIGHT of the screen will show the required corrections needed before Place Order.



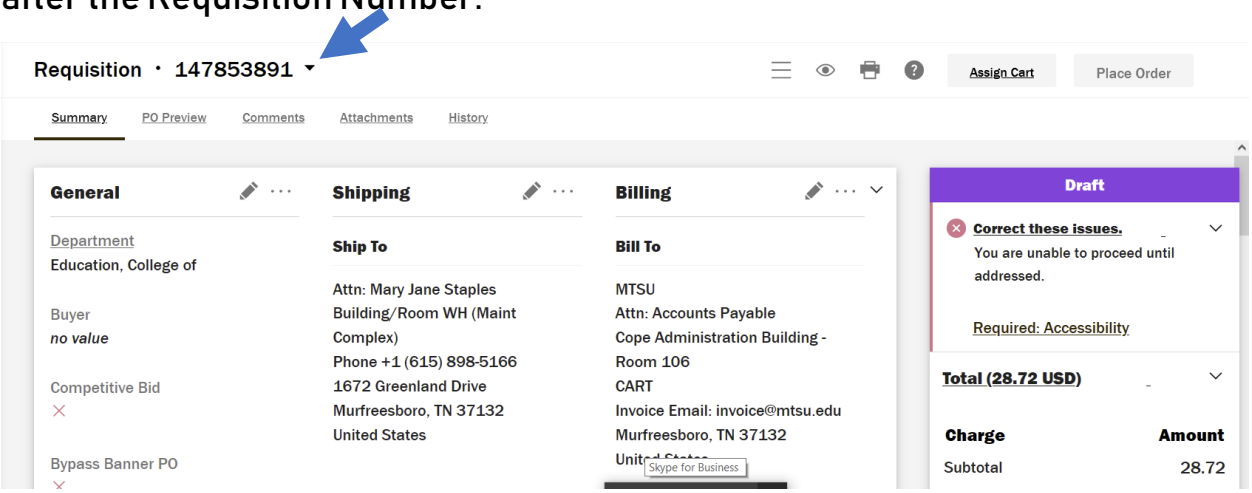
To make changes or corrections click the pencil icon located in that section.



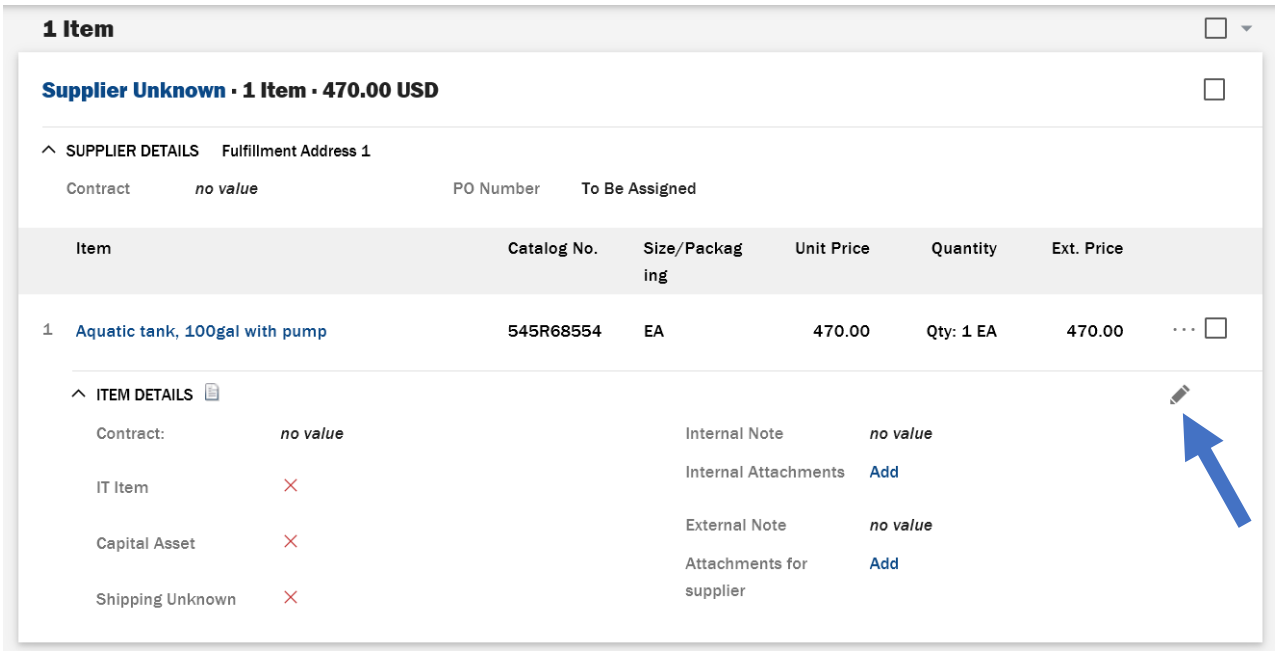
Review each section and make corrections by clicking on the pencil icon.



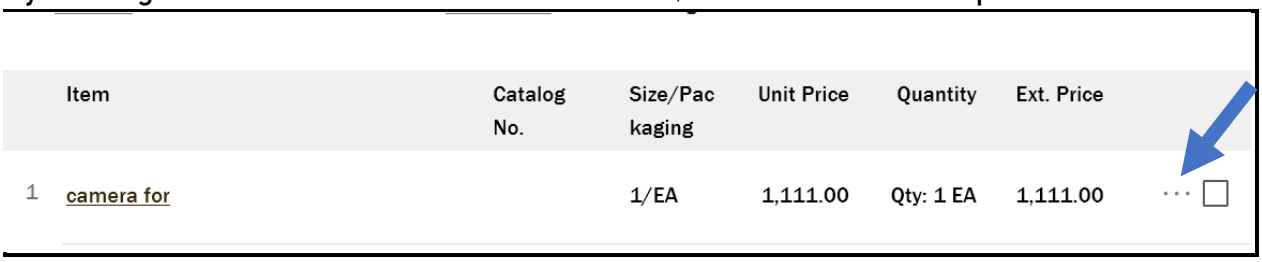
Additional requisition options are available by clicking the down-arrow in after the Requisition Number.



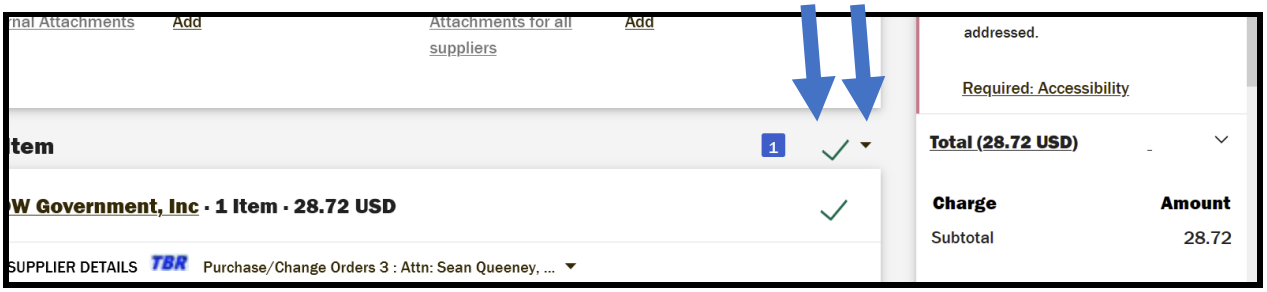
<u>To update or correct Item</u> details, scroll down, and click the pencil icon to the right of a line item.



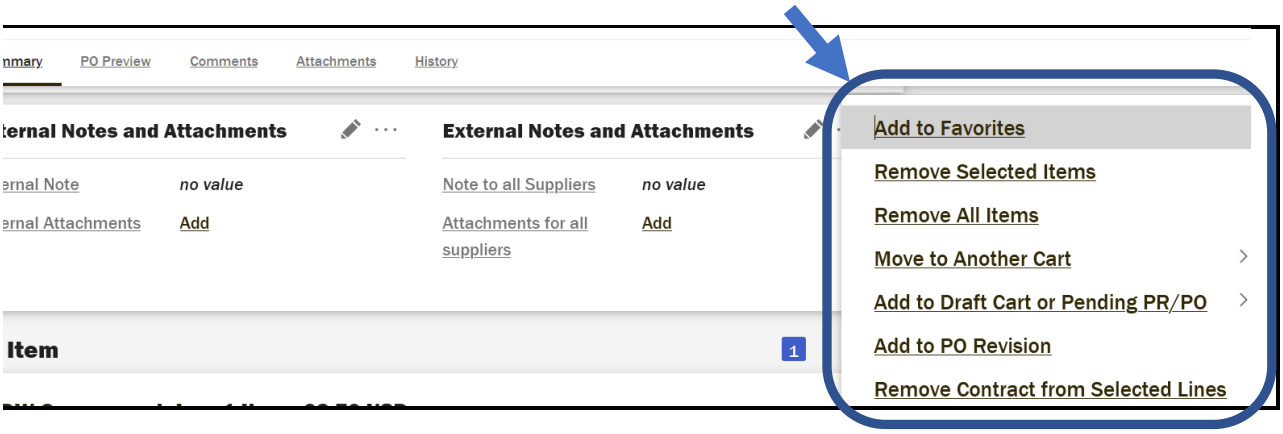
By clicking on dots ··· at the end of the line item, other actions can be performed.

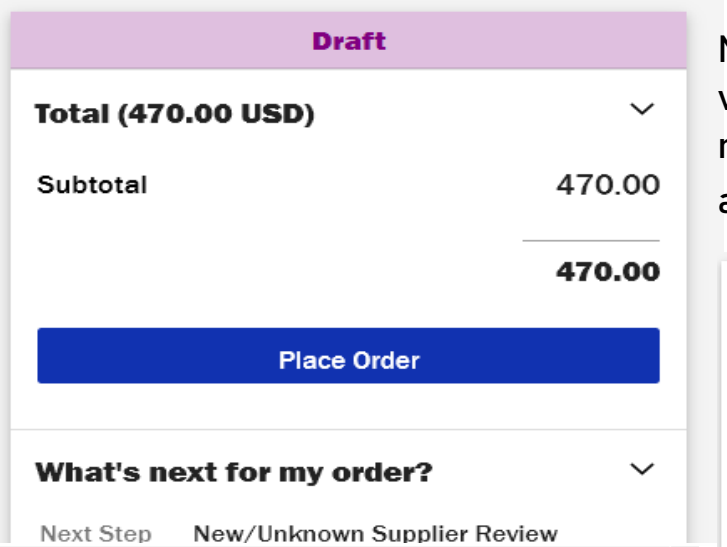


Check the box to the right of the line item and clicking the down arrow…

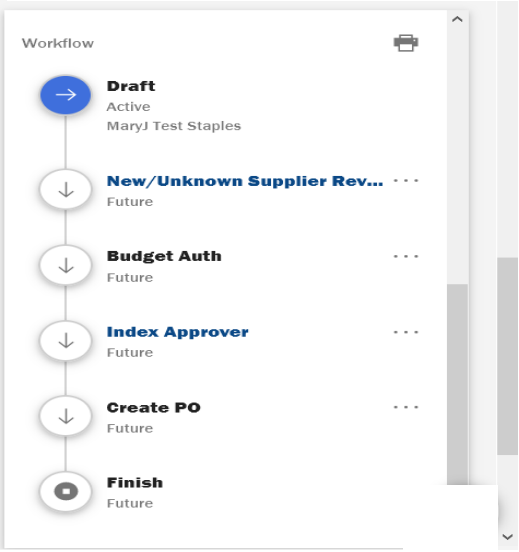


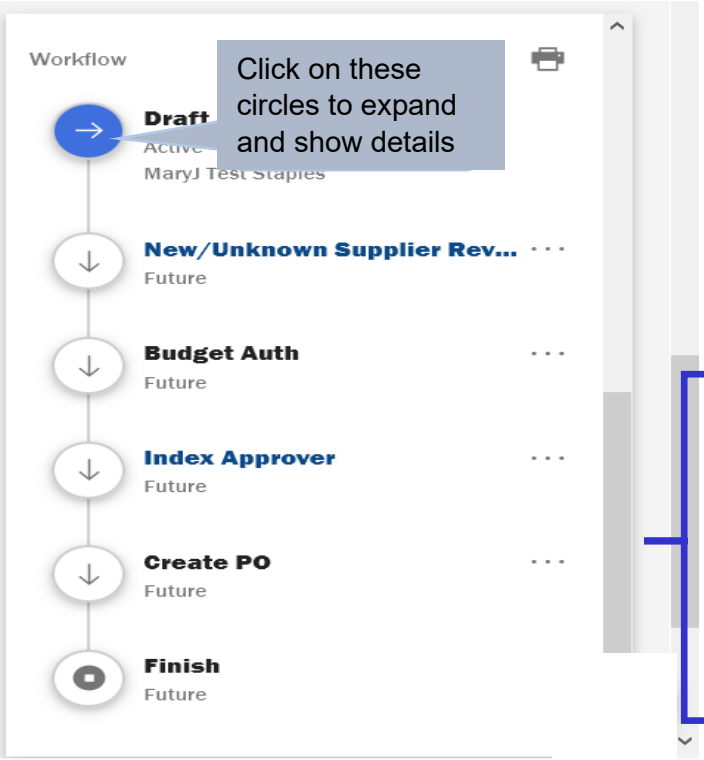
Actions related to the item will become available.





Note -the workflow is aligned vertically. After the Draft Cart is reviewed and all corrections are made, click Place Order.



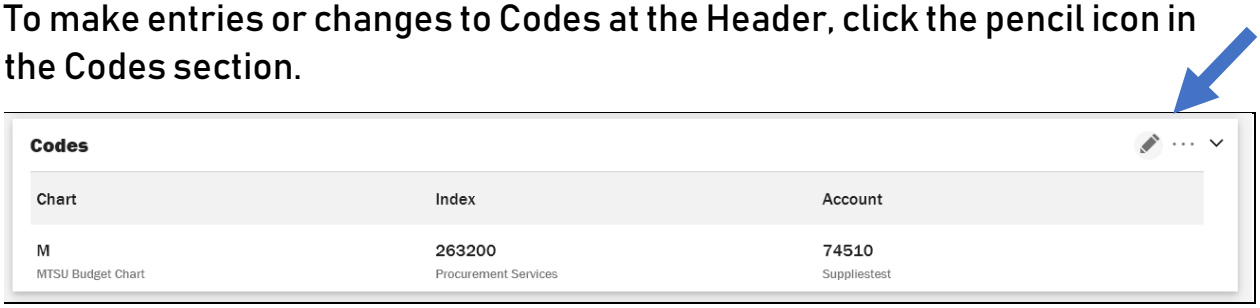


NOTE: The resolution on your monitor may not allow for the workflow side bar to be seen clearly. To slide, click inside the box, hold, and slide.

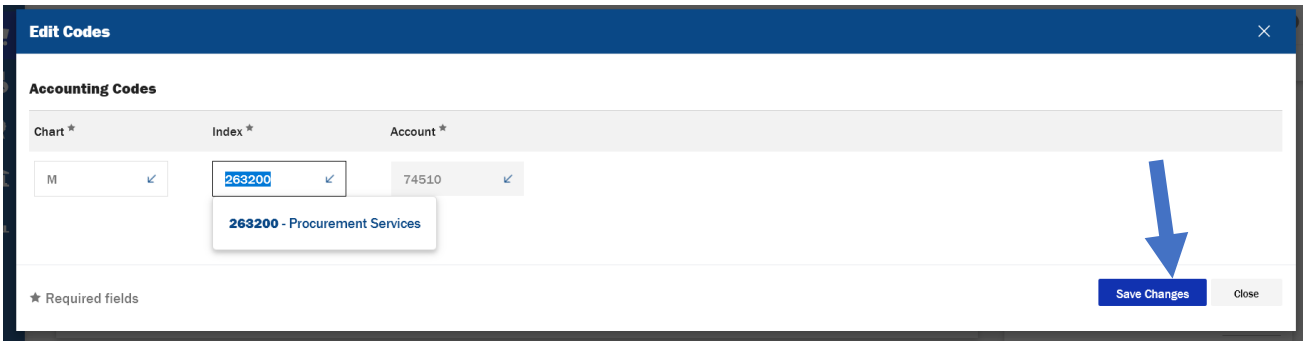
There will be two bars, one for the web page and the other for the workflow queue box.

CODE CHANGES

To make entries or changes to Codes at the Header, click the pencil icon in the Codes section.

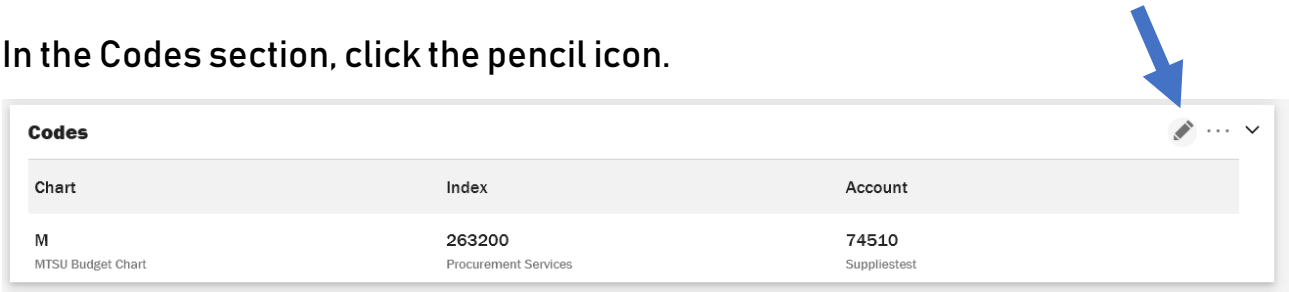


Highlight the code to change, delete, then enter the correct information. Click Save Changes to complete.

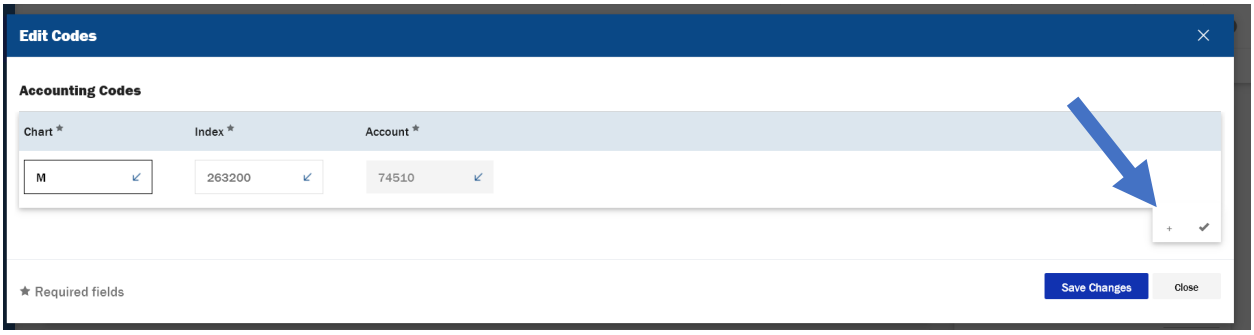


SPLIT CODES AT THE HEADER

In the Codes section, click the pencil icon.

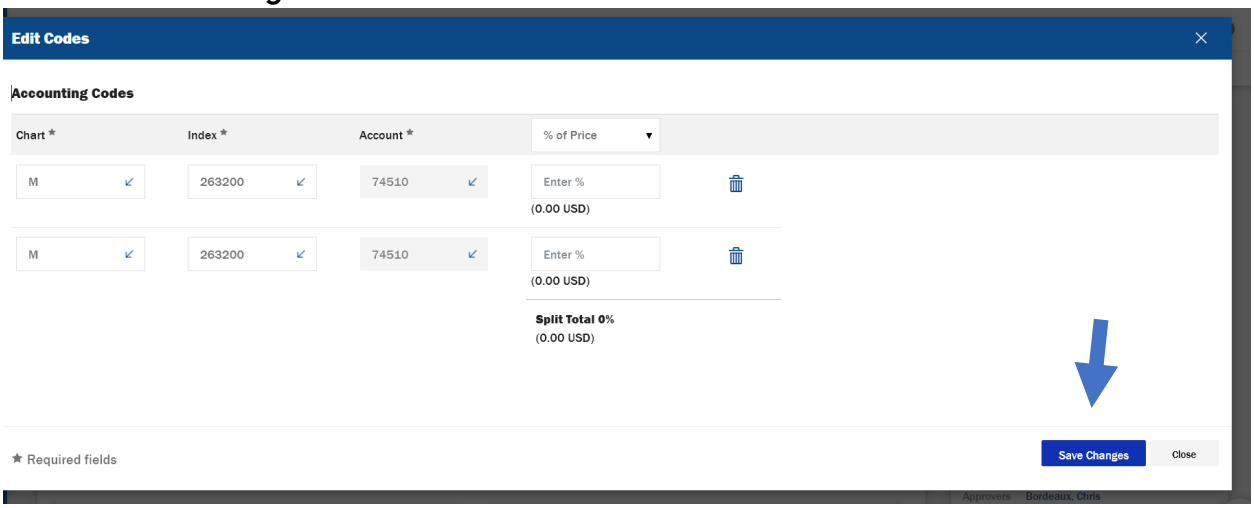


Hover over the form to allow the plus sign (+) to appear. Click the + to add additional splits.



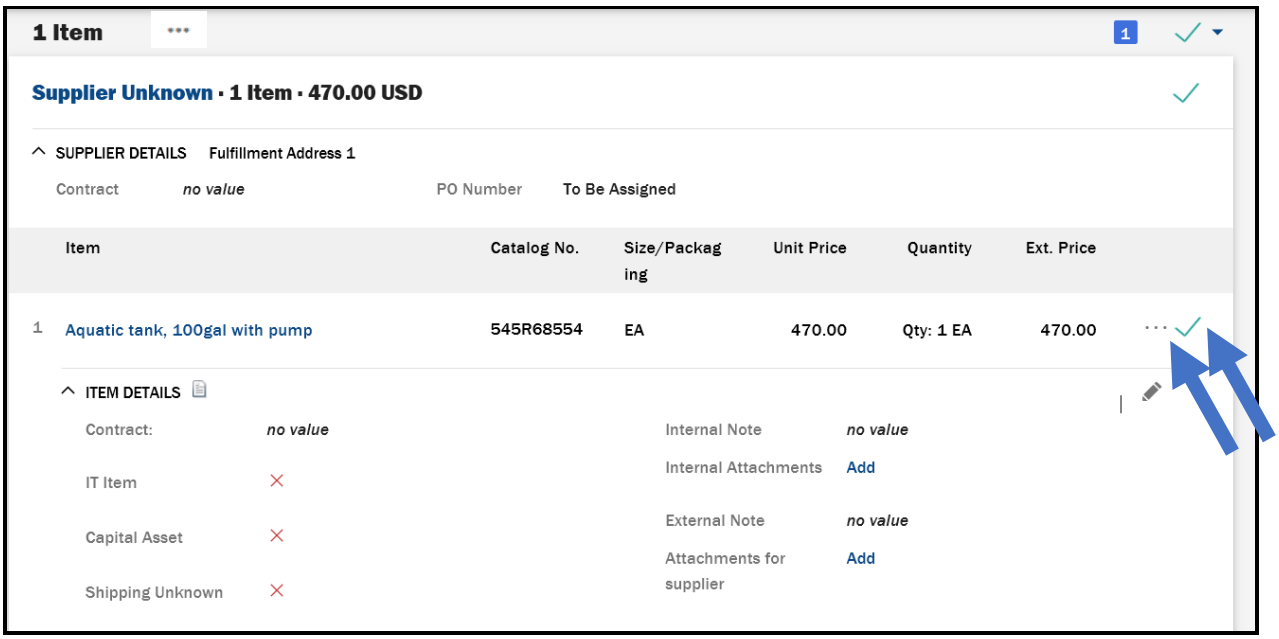
Enter the appropriate information. Always select 'Amount of Price'.

Click Save Changes.

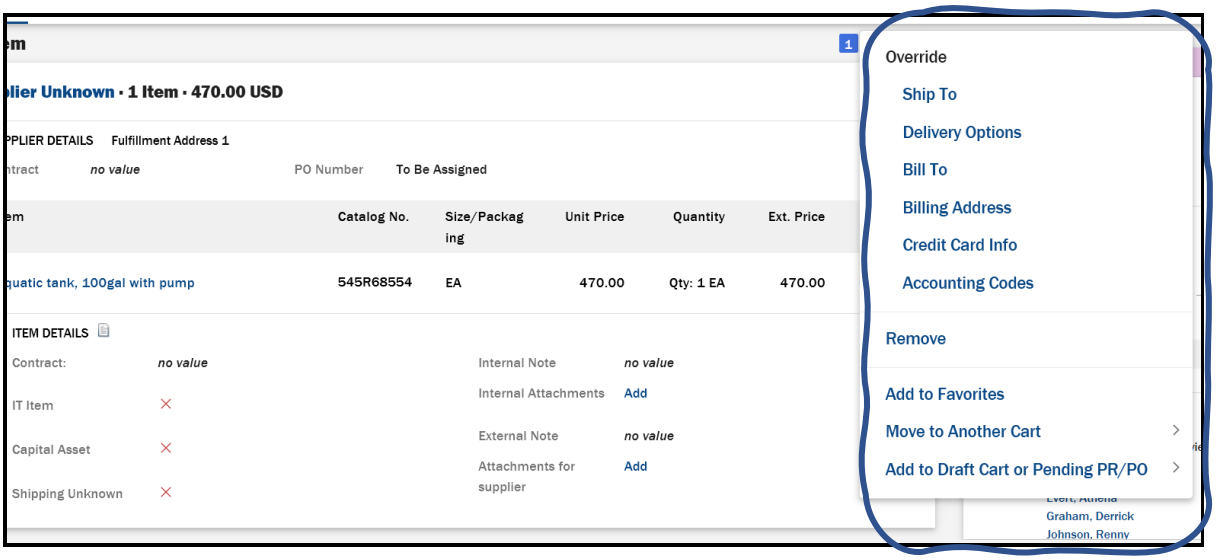


SPLIT CODES AT THE LINE LEVEL

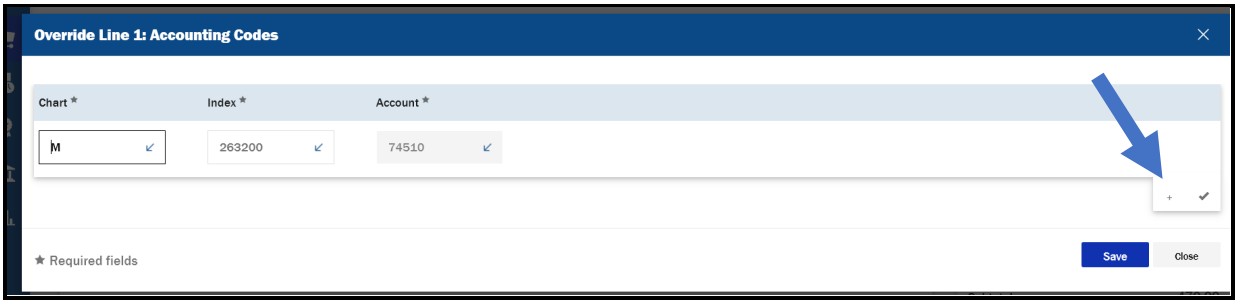
Check the box to the right of the price to select the item to split.



Click the dots . . . to open the options, which will appear on the right.

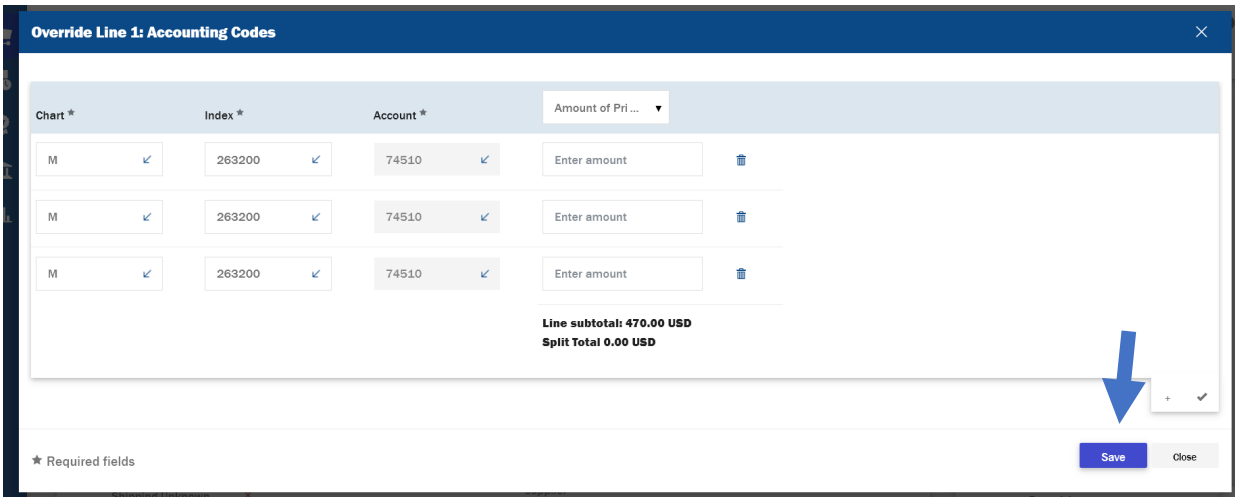


From the list, Click Accounting Codes. Hover over the form to allow the plus sign (+) to appear. Click the + to open the form and add the splits.



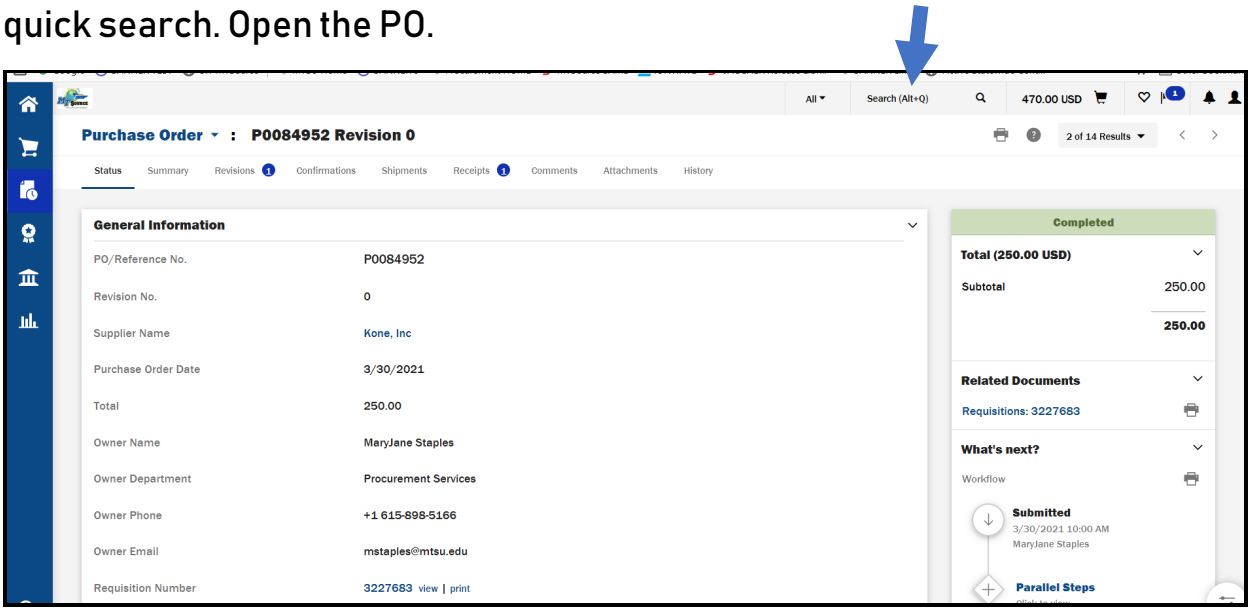
Enter the appropriate information. Always select 'Amount of Price'.

Click Save.

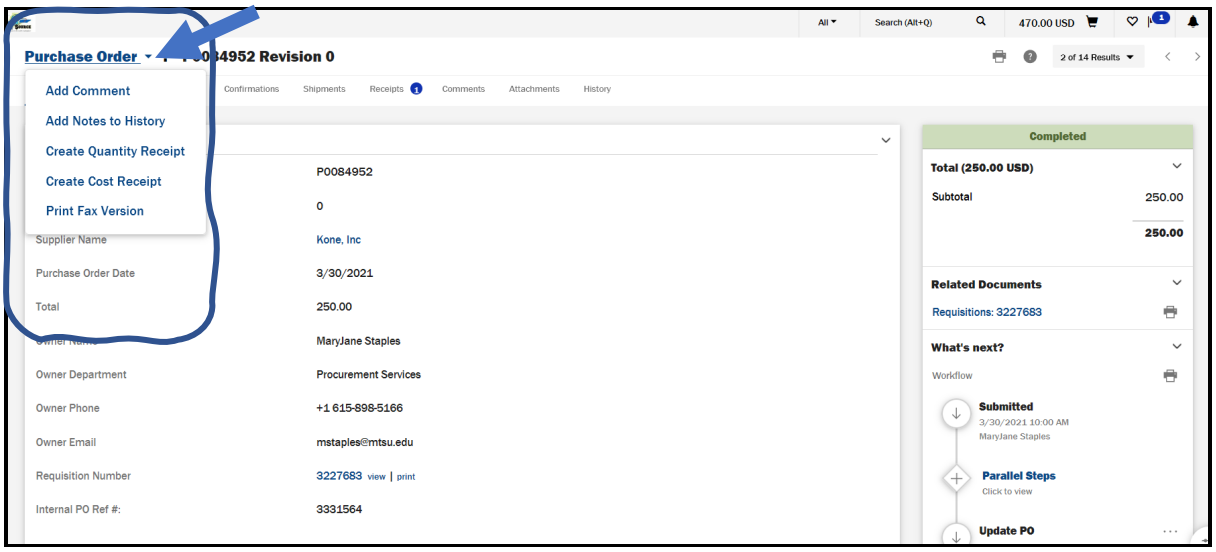


SETTLEMENT RECEIPT

Search to locate the Purchase Order Number or enter the PO Number in the quick search. Open the PO.



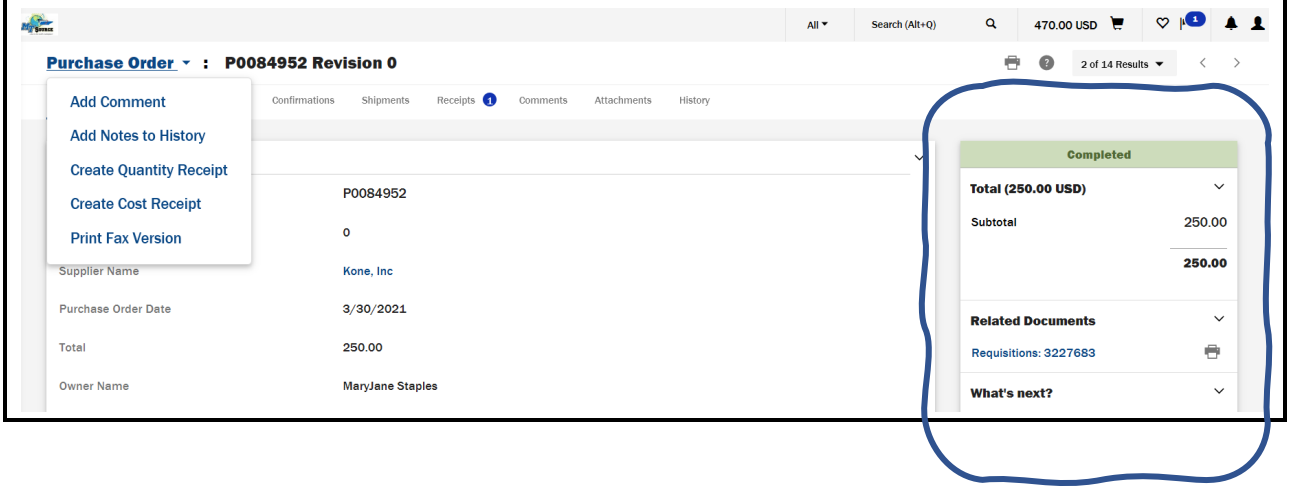
On the left, Click on the down-arrow next to 'Purchase Order', this will open with options for your receipt.



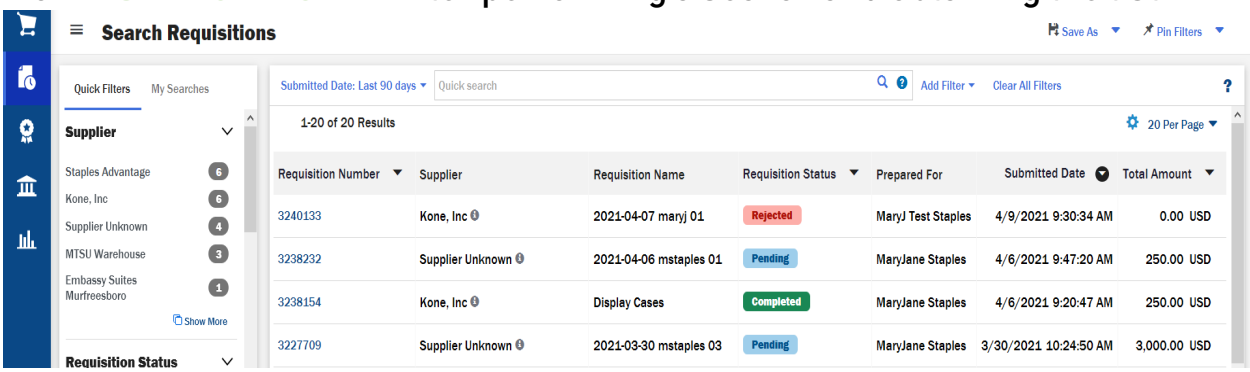
Select *quantity receipt* for products and items or *cost receipt* for services, contracts, and leases. Perform the receipt entry routine as normal, no changes were made to the receipt form.

GENERAL NOTES:

NOTE: The Green section on the right of the PO screen will show the vertical steps of the requisition or purchase order.

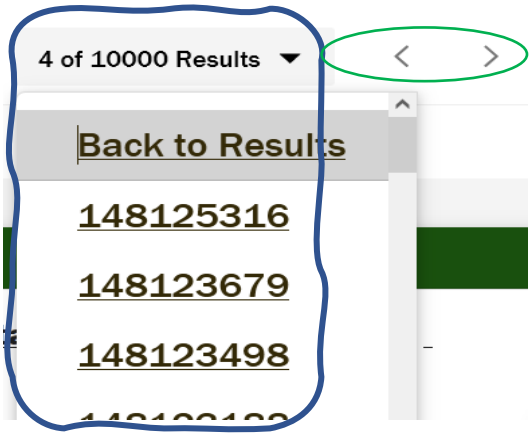


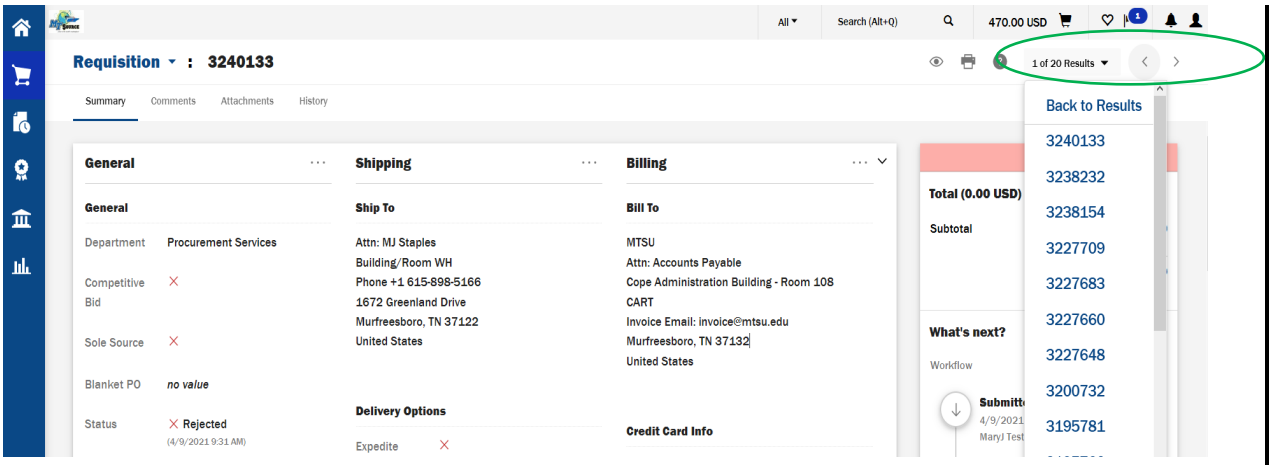
NOTE: SEARCHING TIP: After performing a search and obtaining the list . . .



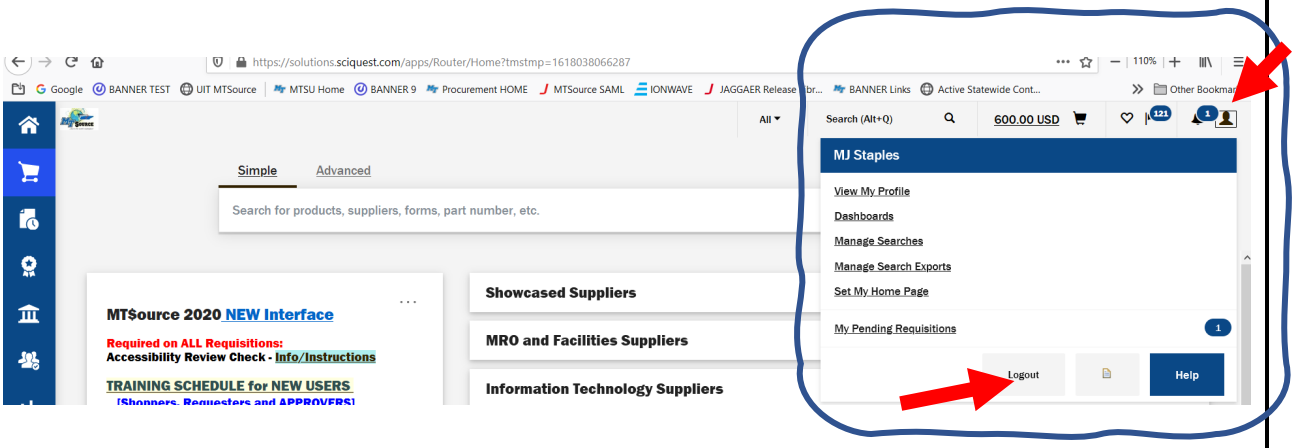
click on the search element (Req number of PO number) to open.

To return to the listing of results, use the down-arrow for the 'list of results' or the < > arrows.





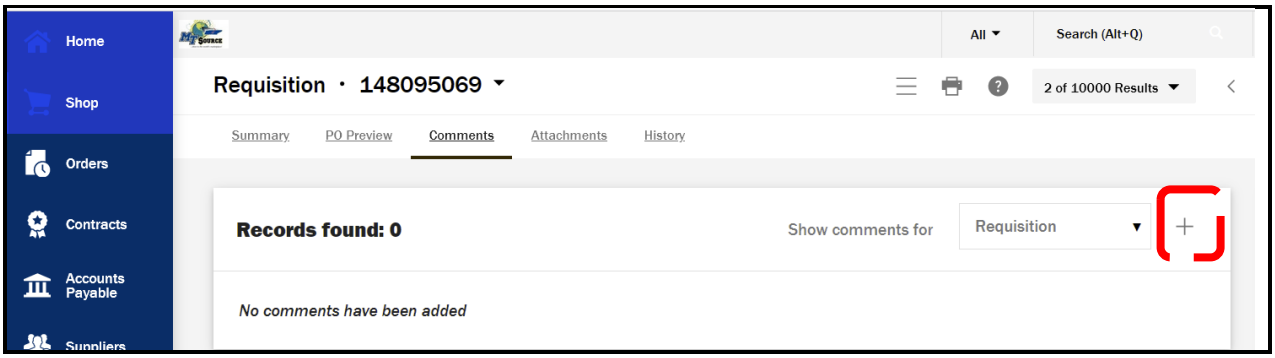
LOG OUT: To log out, Click the icon on the top right of your screen. A drop-down will appear at the bottom with the option to log out.



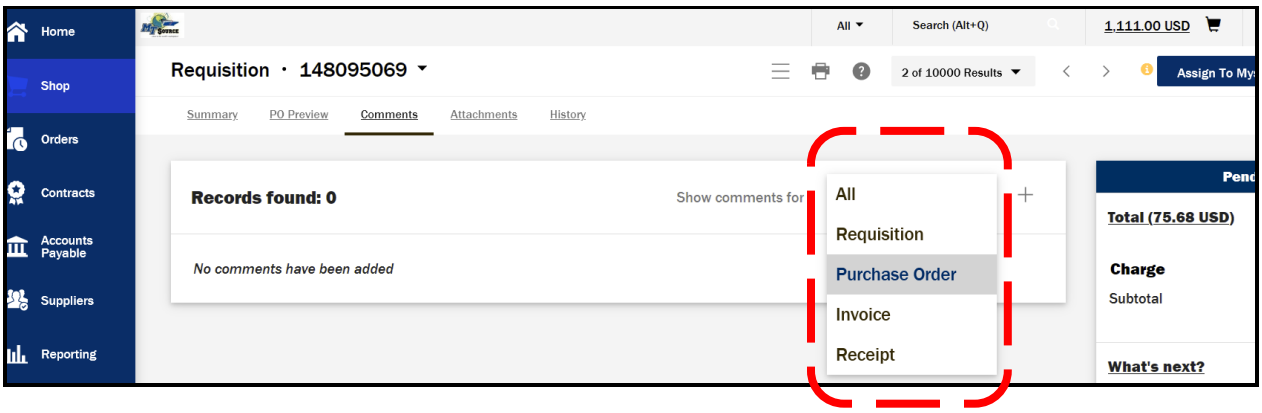
Create a Comment

From an open Requisition or PO, Click the Comments tab.

Click the plus sign (+) to open the comment form

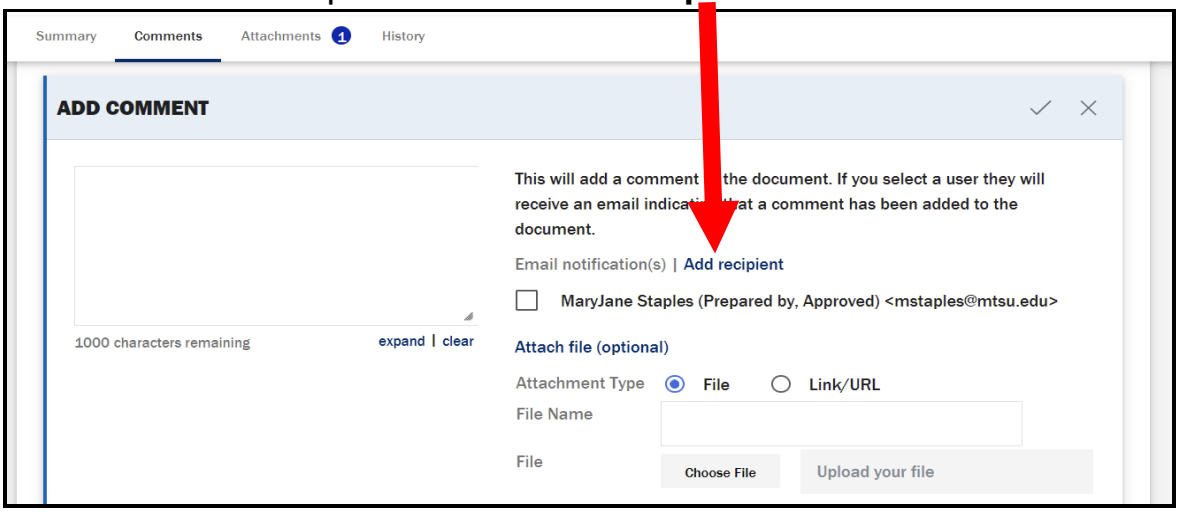


Locate which document to add the Comment. Best practice is to choose **ALL,** that way your Comment will be seen on the requisition, PO, Invoice and Receipt.

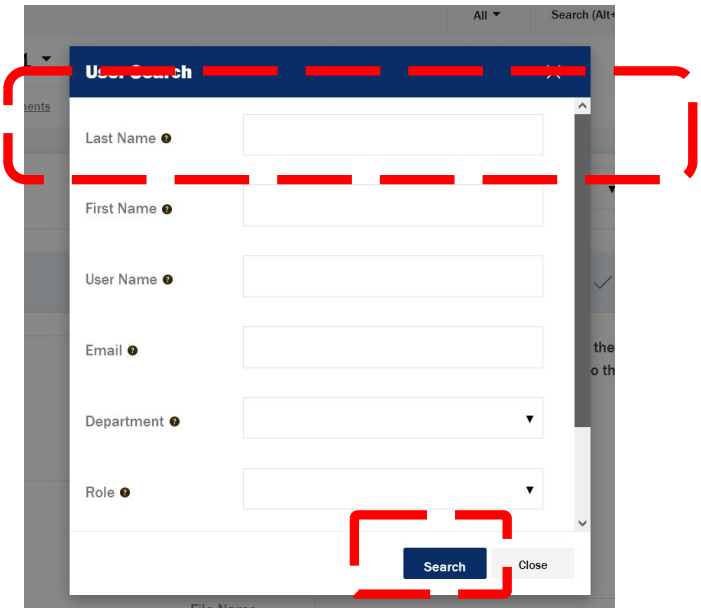


The form will open for your comment entry. Be sure the recipient(s) you wish to receive the Comment is **listed** and **checked.**

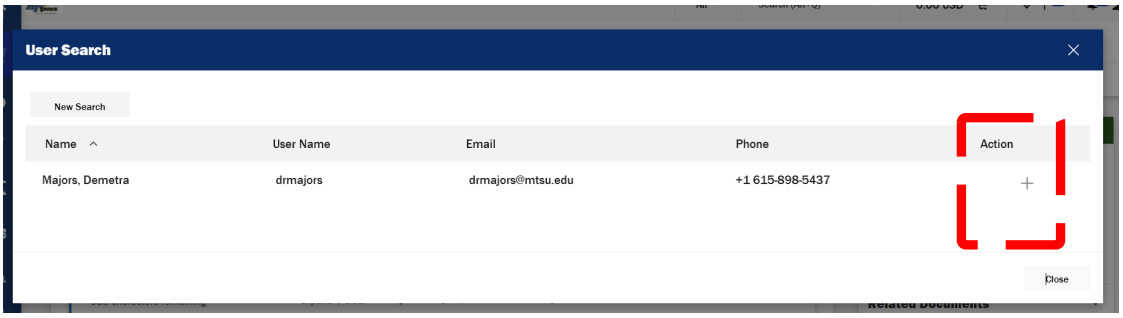
To add another recipient click **Add Recipient.**



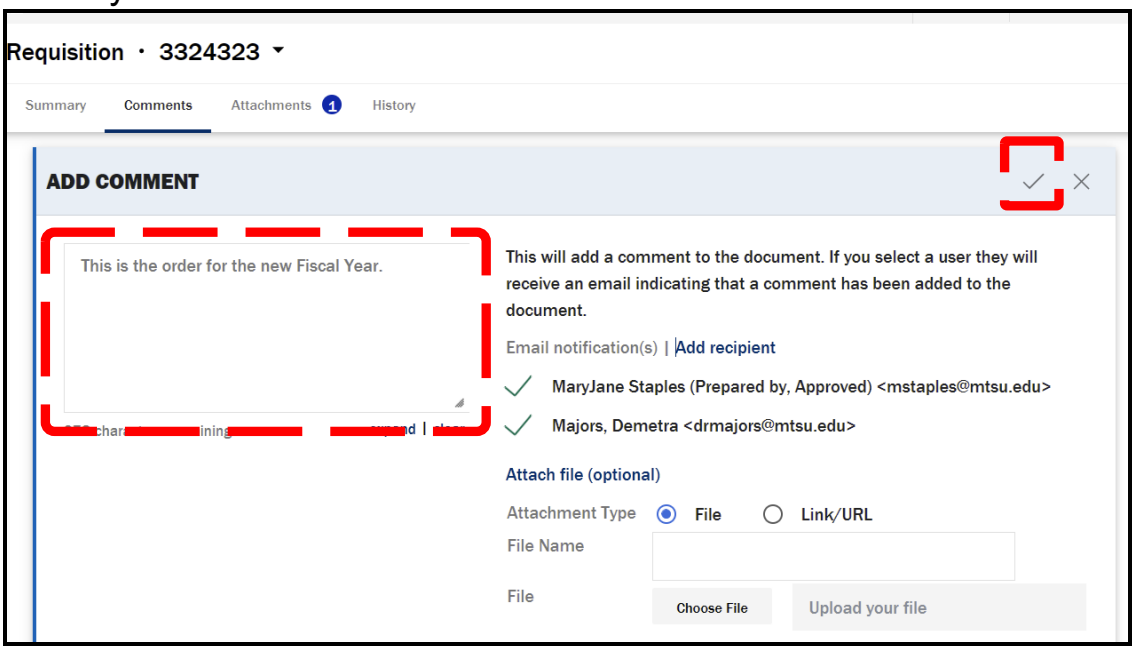
A search form will open, enter the last name of the recipient and click **Search**.



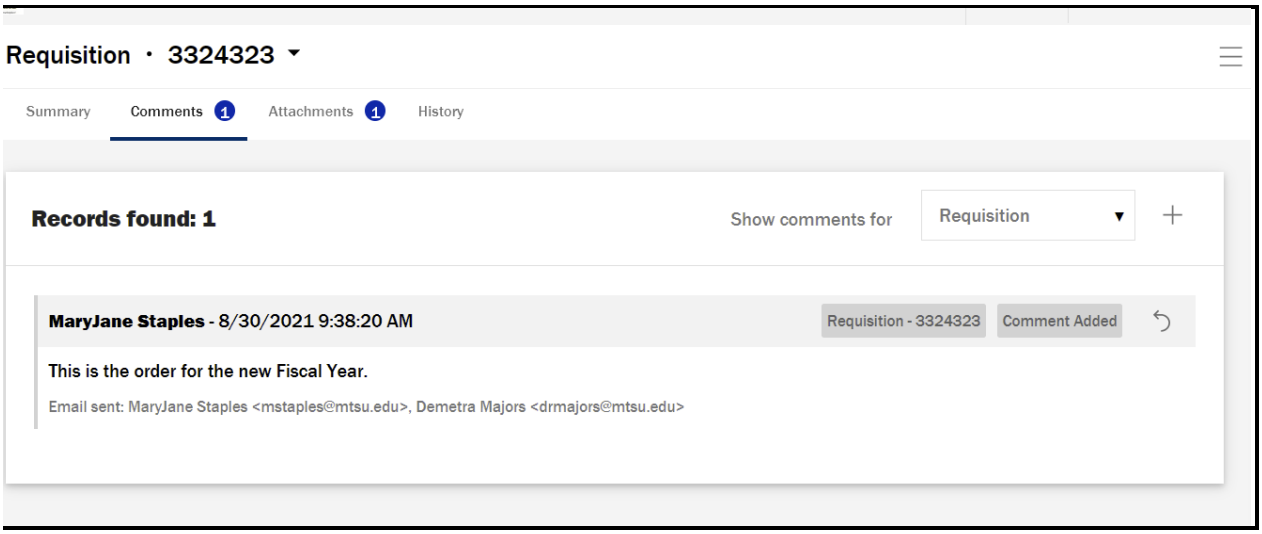
When the name is found, select by **clicking the plus sign (+) under Action.**



Enter your Comment. Click the **check mark** to send.



Your Comment will be posted and sent to the selected recipient.



To upload or attach a file inside a Comment, use the actions listed below.