



**Texas Comptroller of Public Accounts**

**Texas SmartBuy Online Ordering System**  
**User Guide**



**April 2022**

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# Texas SmartBuy Overview and Resources

This guide documents the high-level steps for using the Texas SmartBuy system. In order to view more detail and screenshots for the subjects covered in this guide, reference the guides mentioned in each section.

## Who can use this system?

1. State and local government employees can search Texas SmartBuy for items they need. Anyone can look at items offered in the system.
2. State agency purchasers and local government purchasers who belong to the [SmartBuy Membership Program](#) can place orders in the system.

### How can a Local Government get access?

Become a [SmartBuy Member](#) and for a \$100 annual cost recovery fee, your entity can purchase from the Texas SmartBuy system and use other statewide purchasing contracts.

## System Requirements and Browser Compatibility

Browser Version
Google Chrome 34+ (Recommended)
Firefox 26+
Edge
Safari

### NOTES:

- Allow pop-ups to support several features in the Texas SmartBuy system, including the Add to Cart view, Item Comparison view and more.
- System features are best viewed in the browser versions listed above. Other browser versions may not display correctly.

## Public Purchase Order Search

Public, non-logged in, users can search for specific purchase orders using the Texas SmartBuy systems. On the navigation bar, click on the Purchase Orders tab to enter the purchase order number.

After clicking search, purchase order will be displayed and purchase order number is clickable to get a pdf copy of purchase order.

### Purchase Order Details

Purchase Order #	Purchase Order Date	Purchaser Name	Contractor Name	Purchaser Order Total
<a href="#">14023261</a>	8/4/2014	TxCPA Agency for Testing - 54321	Tibh Industries, Inc	\$46.14

## Searching for items

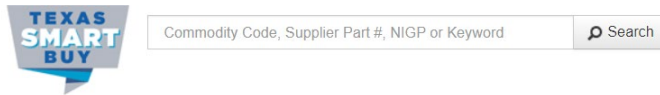
### Search Bar

On TxSmartBuy.com, the search bar is used in a variety of ways to locate items for purchasing. Users may search for items based on commodity code, supplier part number, NIGP code, or by searching based upon other various keywords.

On the TxSmartBuy.com home page, the search bar is located directly to the right of the Texas SmartBuy logo, and can be used publicly - without logging in as a purchaser.

**TIPS:**

*If a specific commodity code or part number is not available, enter in as much detail about the item for the best group of results.*

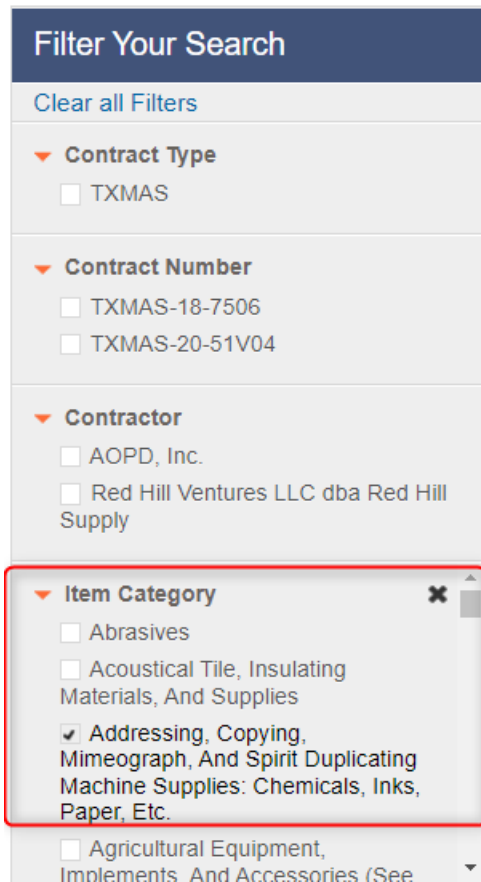


### Browse by item category

From the Txsmartbuy.com home page, users can select one of the Item Categories on the left to create a search narrowed to items within that category (based on the NIGP 3 digit class code).

Select the “Search by Category” link at the bottom of the category column to load a page with all category listings available to view in TxSmartBuy.

Select any category to view search results specific to that category.



## Browse items by contract

At the upper right of the TxSmartbuy.com home page under the Agency/SmartBuy Members Sign In button in the blue navigation bar, users can select the “Contracts” link to view a list of all statewide contracts administered by the Comptroller’s office.

Each contract number links to a Contract Details page.

On the Contract Details page for any Texas SmartBuy Term and TXMAS contracts, a button titled “Search for items in this contract” is available under the Contract heading.

Select that button to create a search narrowed to items available on that contract.

## Contract Details: # 050-A1

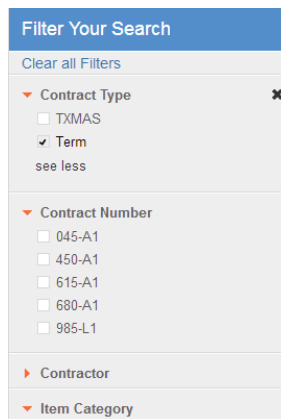
Q Search for items in this contract

Number	050-A1
Description	Art Equipment And Supplies
Category	TxSmartBuy
Type	Term

## Filters

Using filters is a fast and easy way to narrow down a large amount of search results to a more manageable sample. Once a user has searched for an item on the web store, filters are available on the left-hand side of the webpage.

Available filters include:



- Contract Type
- Contract Number
- Contractor
- Item Category
- Contract Award Level
- Zone
- Highway District
- Area

*TIP: Multiple filters can be used to further narrow down search results.*

## Sorting

Sorting allows users to manipulate the search results and organize the data based on certain criteria. By using the sort function, users have the ability to easily locate items based on:

- Ordered Search
- Price, Low to High
- Price, High to Low
- Commodity Code, Low to High
- Commodity Code, High to Low
- Award Level, Low to High

The Sort By drop-down menu is available directly below the Results Found heading. To use the sorting function, simply click on the arrow next to the “Sort By:” drop-down menu and select the desired criteria.

Over **10,000** Results Found



## Page organization of search results

When there are several pages of results, page links appear at the top of the search results page. Users can view all of the search results by navigating through the various pages.

Over **10,000** Results Found

Sort By: Ordered Search « 1 2 3 4 5 »

### Display number of results per page

Users can expand the number of search results shown on the page from 50 to 100. This can be helpful for printing results for procurement files and more.

Show: 50 results per page

### Item Comparison

On the search results page, users have the ability to compare up to five items side-by-side to determine the best value item for purchase, or to easily see any differences between two or more items.

The compare tool allows users to compare various item criteria such as price, contract type, and description on one screen.

**STEP 1:** Below the “Add to Cart” button on every search result item, select the “Compare” checkbox for items of interest. For users that are not logged in, the compare checkbox will appear beneath the “Add to Wish List” button.

Price **\$70.00** UOM **TON**  
 Min. Order Qty: 24  
  
 Compare

**STEP 2:** Once two or more items have been selected, click on the blue “Compare Items” button located at the top right of the page.

Over **10,000** Results Found Compare Items Export to CSV

Sort By: Ordered Search « 1 2 3 4 5 » Show: 100 results per page

**STEP 3:** Review the results. Remember to check zones, areas, and highway districts to confirm item availability.

ITEM COMPARISON			CLOSE x
<b>Item Name:</b>	771G--771G FORD E-350 EXTENDED HEIGHT 14 PASSENGER VAN	760D--201 DOORS-SLIDING SIDE DOOR GER V	750C--750C Freightliner Sprinter 2500 144" WB 1/2 TON FULL S
<b>Description:</b>	771G--771G FORD E-350 EXTENDED HEIGHT 14 PASSENGER VAN	760D--760D Chevrolet CG33706 /Ext Pass Van 1 TON FULL SIZE EXTENDED PASSENGER VAN,8-CYLINDER DIESEL, 15 PASSENGER	750C--750C Freightliner Sprinter 2500 144" WB 1/2 TON FULL SIZE PASSENGER VAN 6/8-CYL, 8 PASSENGER
<b>Price</b>	\$36,950.00	\$36,424.10	\$47,862.00
<b>UOM:</b>	EA	EA	EA
<b>Contractor:</b>	Sam Pack's Five Star Ford	Gunn Chevrolet	Fort Worth Freightliner
<b>Contract:</b>	071-A1	071-A1	071-A1
<b>Contract Type:</b>	Term	Term	Term
<b>Commodity Code:</b>	07192101751	07192101741	07192101630
<b>Min. Order Quantity:</b>	1	1	1

**STEP 4:** Use the Add button at the bottom of an item column to select and add that item to the cart. Or simply close the comparison window in the upper right or lower right corner.

Delivery Days:	120	120	120	120
NIGP Code:	07192	07192	07192	07192
Start Date:	9/1/2013	9/1/2013	9/1/2013	9/1/2013
End Date:	8/31/2014	8/31/2014	8/31/2014	8/31/2014
Supplier Part #:	--	--	--	--
Manufacturer:	FORD	Chevrolet	Chevrolet	Chevrolet
Sold By HUB:	--	--	--	--
Recycle:	--	--	--	--
	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>

### Download Search Results

The Export to CSV function creates a data file in the CSV (comma delimited) format for users to save to their local device and view the search results in spreadsheet software such as Microsoft Excel or Apple Numbers. When comparing a large number of items on a particular search, it may be easier for users to export the results and review them in a spreadsheet format.

**STEP 1:** Search for any item(s) using the search bar and click the search icon.

**STEP 2:** On the search results page, click the blue “Export to CSV” button. This will automatically download a CSV file.



**STEP 3:** In spreadsheet software, you can import the file, or it may load a text view with field values divided by commas. You will need to use the function that allows you to apply text across columns using a comma delimiter.

### Add to Wish List

The “Add to wish list” feature is useful for employees to compile specific items, options, and pricing they want to request. A list of several items can be created and printed or saved as a PDF to email. Items on a wish list **cannot** be ordered without a Texas SmartBuy username and password. Contractors are encouraged to use this feature to support communication with Agency/SmartBuy Members to help compile item information for purchasing requests and orders.

### Access to Add to Wish List

All visitors to TxSmartBuy.com can search and add items to a wish list. Authorized Purchasers are able to log in with a username and password to add to cart, checkout and finalize purchases.

The “Add to wish list” button is accessible to all site visitors from the:

1. Search Results page
2. Item Details page
3. Item Comparison view

### Item Information

#### Attributes

When viewing certain items, users can customize their item by selecting various item attributes, such as item color, size, finish, and more.



### Dealers

Items available on certain TXMAS contracts may be fulfilled by local dealers. The dealer list will be displayed as a drop-down list beneath the quantity in the “Add Item to Wish List” view.

Users may select a specific dealer (*if applicable*) and should advise their purchaser colleagues to call in advance to the specific dealer to confirm availability before placing an order on Texas SmartBuy.

### Shipping Details

The delivery days will be indicated in the Shipping Details section in the upper right section of the Add Item to Wish List view.

## Additional Charges, Priced Options, TXMAS Incidentals

### Charges

Pre-defined 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.

Additional charges may be added by selecting the “Add New” button beneath the charge line. Edits can be made to each line as often as needed. A charge may also be removed by selecting the black “X” button to the right of the charge.

The subtotal of the price for the Charge items will appear in the Charges tab.

### TXMAS Incidentals

For TXMAS contract items, various incidental charges may be associated with an item. “TXMAS Incidentals” appears as a tab. Incidentals should only be utilized when the necessary charges are not available on the “Charges” tab.

Enter the *Price* and *Description* of the incidental and select the “Add New” button to include an incidental. The subtotal of the price for the incidental items will appear in the TXMAS Incidental tab.

Additional Charges		TXMAS Incidentals \$183.51	Charges \$500.00	Subtotal: \$683.51
Price	Description			
\$ 183.51	3 cases of 15" Purple "Tug Tight" Pull-tight Seals	✕		
\$		✕		
<a href="#">Add New</a>				

### Options

Options are items that are linked or associated with a primary item. Options typically have a cost that will increase or decrease the primary item price. For example, a passenger van could have several options that customize the van to match the procurement requirements.

To add a linked item, go to the Options tab. All applicable options will be shown. Select the "Add Item" button to create another line. Additional lines can only be added for each available option. To delete a linked option, select the black X at the right end of the row.

The subtotal of the price for the Options will appear in the Options tab.

The subtotal for all charges will show to the right of the Additional Charges heading.

Additional Charges		Options \$4,120.00	Charges \$0.00	Subtotal: \$4,120.00
Item	Price	Quantity	Notes	
374C--444 WARRANTY -	\$1,730.00	1		✕
374C--6 ALL WHEEL DRI'	\$2,390.00	1		✕

### My Wish List View

Once items are added to the wish list, they will appear in total on the "My Wish List" screen.

#### Edit/Delete Item(s)

Users can make edits to an item after adding them to a wish list. Use the "Edit" button located next to each item in a Wish List to change item information such as quantity, charges, and options.

Use the "Delete" button to quickly remove items from wish list.

### My Wish List

Item	Shipping Address	Price	Qty	UOM	Subtotal	
Hot-Mix Cold-Laid Asphalt Concrete	.	\$81.20	24	TON	\$1,948.80	<a href="#">Edit</a> <a href="#">Delete</a>
Delivery Charge		Price \$0.45	Miles 1	UOM TON/MILE	Delivery Subtotal \$10.80	

### How to use your Wish List

Wish lists are not saved since you are not a logged in user. You can print, export as a .csv or PDF, or share the wish list with an authorized purchaser to complete the order.

## My Wish List

Share

Item	Shipping Address	Price	Qty	UOM	Subtotal	
Mid-size Crossover/Wagon - 120 to 134.9 cu ft, Electric Vehicle		\$31,775.00	1	EACH	\$31,775.00	<a href="#">Edit</a>
	Delivery days: 150					<a href="#">Delete</a>

Commodity Code: 0710422  
Item Detail: Series X120EV Mid-size Crossover/Wagon - 120 to 134.9 cu ft, Electric Vehicle  
Contractor: Caldwell Country Chevrolet, LLC  
Contract: 070-A1  
Min. Order Quantity: 1  
Special Item Notes: CONTACT DEALER BEFORE PLACING PO. Purchasers should document their reasons for selecting the vehicle & vendor as the best value in series for their entity.

Pickup Date: 9/9/2022

Order Total: \$31,775.00

[Search for More Items](#)

[Print](#)

[Export Wish List to PDF](#)

[Export Wish List to CSV](#)

### Print Wish List or Export to a PDF

Use the "Print" button at the bottom of your Wish List to open your browser software print window. You can also export the Wish List as a PDF to save and send to others via email. Contractors are encouraged to use this feature to support communication with Agency/SmartBuy Members to help compile item information for purchasing requests and orders.

### To share your Wish List

Max number of items that can be in a shared cart is 24 items

- Select Share
- Choose either option 1 that will generate an email using your default email application or option 2 and copy the URL listed into your email

## Add to Cart

### Purchaser access to Add to Cart

Texas SmartBuy allows purchasers to add items to cart, checkout and finalize purchases -- only if they are logged in with a username and password. If the "Sign In" button is available in the upper right, then the user is NOT logged in. "My Account" will display in the upper right, once logged in.

Items can then be added to cart from:

1. the Search Results page
2. the Item Details page
3. the Item Comparison view

## Item Information

### Attributes

When purchasing certain items, purchasers have the ability to customize their item by selecting various item attributes, such as item color, size, stain, and width.

## Add Item to Cart

**Item Information**  
Quantity:   
Colors:  ▾  
Sizes:  ▾  
**Commodity Code:** 20070  
**Unit Price:** \$36.82 per EA  
**Description:**  
Under Armour ColdGear Compression Fit  
Mens Crew Neck Shirt

### Dealers

Items available on certain TXMAS contracts may be fulfilled by local dealers.

Purchasers have the option to select a specific dealer (*if applicable*) during the ordering process and are advised to call in advance to the specific dealer before placing an order on Texas SmartBuy.

Purchase orders are specifically received by dealers rather than parent contractors during this process.

**Item Information**  
Quantity:   
Dealer:  ▾

### Shipping Details

#### Delivery Date

As users add items to the cart, they have the ability to change the delivery dates of certain items to meet their specific needs. This allows purchasers to anticipate not only the location, but the time at which their purchased items are delivered.

**Shipping Details**  
Delivery date:   
 Ship to saved address  ▾  
 Ad-hoc address

### Ship-To Addresses

#### Saved addresses

Each state agency or SmartBuy Member account has pre-established addresses for shipping and billing stored in the Address Book available in the My Account section. Purchasers can set their preferred billing and shipping addresses as Defaults within the Address Book. This feature allows purchasers to add items to the cart and check out quickly by selecting from these saved addresses in the Add to Cart view.

**Shipping Details**

Delivery days: 14 days

Address

Ad-hoc address

- A0912 -**  
1995 HILTON ROAD  
, PAMPA TX
- A0484 -**  
ACA ACCREDITATION 1060 HWY 190 E  
, HUNTSVILLE TX
- A0028 -**  
ACCESS TO COURTS 1060 HWY 190 E  
, HUNTSVILLE TX

#### Ad-hoc addresses

Selecting the “Ad-hoc address” option allows purchasers to enter in a different address than those listed on the pre-defined address list. This is useful for purchases delivered to a location not typically used in the normal course of business.

*NOTE: Ad-hoc addresses are saved to the line item only and are not stored in your Address Book. To add or make changes to a regularly used address, contact your Superuser.*

**Shipping Details**

Delivery days: 1 day

Address

Ad-hoc address

**AA002**  
AUSTIN EXECUTIVE ADMINISTRATION  
8610 SHOAL CREEK BLVD.  
AUSTIN, TX 78757

**\*Indicates required field**

<input type="text" value="Attention/Contact Person"/>	<input type="text" value="*Address 1 (Required)"/>
<input type="text" value="Organization/Department"/>	<input type="text" value="Address 2"/>
<input type="text" value="Phone"/>	<input type="text" value="Address 3"/>
<input type="text" value="Address Label"/>	<input type="text" value="*City (Required)"/>
	<input type="text" value="Texas"/>
	<input type="text" value="*Zip Code (Required)"/>

## Additional Charges – Adding Charges, Quotes, Priced Options, TXMAS Incidentals

### Charges and Quotes

Purchasers may add pre-defined, additional charges to an order via the “Charges” tab on the “Add Item to Cart” view. These charges are specifically defined on each contract; therefore, only eligible charges appear on the tab. Some examples of “Charges” include freight, installation or removal, and inside delivery.

The purchaser will select the charge or quote *Item* and enter a *Price* obtained from the contractor and an optional *Description* (if helpful). Additional charges may be added by selecting the “Add New” button beneath the charge line. Edits can be made to each line as often as needed prior to checking out. A charge may also be removed by selecting the black “X” button to the right of the charge.

The subtotal of the price for the Charge items will appear in the Charges tab.

Additional Charges		
TXMAS Incidentals \$0.00		Charges \$130.00
<b>Subtotal: \$130.00</b>		
Item	Price	Description
Installation OR Removal Charge	\$ 80	
---		
Furniture Quote		
Installation OR Removal Charge		
Transportation and Freight Charge		
Furniture Installation and Reconfiguration Charge		
---	\$	
<b>Add New</b>		

### TXMAS Incidentals

When users purchase TXMAS items, various incidental charges may be added to an order. "TXMAS Incidentals" appears as a tab in the Additional Charges area of the Add Item to Cart view. Incidentals should only be utilized when the necessary charges are not available on the "Charges" tab.

Enter the *Price* and *Description* of the incidental and select the "Add New" button to include an incidental. The subtotal of the price for the incidental items will appear in the TXMAS Incidental tab.

Additional Charges		
TXMAS Incidentals \$183.51		Charges \$500.00
<b>Subtotal: \$683.51</b>		
Price	Description	
\$ 183.51	3 cases of 15" Purple "Tug Tight" Pull-tight Seals	
\$		
<b>Add New</b>		

### Options

Options are items that are linked or associated with a primary item. Options typically have a cost that will increase or decrease the primary item price. For example, a passenger van could have several options that customize the van to match the procurement requirements.

To add a linked item, go to the Options tab. All applicable options will be shown. Select the "Add Item" button to create another line. Additional lines can only be added for each available option. To delete a linked option, select the black X at the right end of the row.

The subtotal of the price for the Options will appear in the Options tab.

The subtotal for all charges will show to the right of the Additional Charges heading.

Additional Charges			
Options \$4,120.00		Charges \$0.00	Subtotal: \$4,120.00
Item	Price	Quantity	Notes
374C--444 WARRANTY -	\$1,730.00	1	
374C--6 ALL WHEEL DRI'	\$2,390.00	1	

### My Cart View

Once items are added to the cart, they will appear in total on the "My Cart" screen.

**\*\*\*Note the max number of items you can put in a cart is 45 items, incidentals and optional items will count toward the total number of items.\*\*\***

### Add note

For each individual line item, the “Add Note” text field is available for purchasers to enter any extra instructions and details regarding the purchase, or the item itself. This text field is located at the bottom of each item added to a cart.

### TIPS:

A note can display up to 300 characters and will appear with the line item on the purchase order form.

To add a note that will appear at the top of the purchase order (rather than at line level), please refer to the “Checkout” section..

**IMPORTANT:** Please allow the page to store the note and refresh before selecting the “Proceed to Checkout” button. A spinning wheel will show until the note is submitted. This process may take up to 30 seconds.

The screenshot shows the 'My Cart' page with a navigation bar containing 'Your Cart', 'Checkout', and 'Confirmation'. Below the navigation bar, the page title 'My Cart' is displayed. The main content area shows a table with one item:

Item	Shipping Address	Price	Qty	UOM	Subtotal	
RF-30REFRIGERATED HOLDING, TRANSPORT CARTS DUAL TEMP CONVERTIBLE UNITS COLD/FREEZE, MOBILE, STAINLE	4747 Ranger Creek Austin, TX 73301 Delivery days: 30	\$5,676.00	1	EA	\$5,676.00	<a href="#">Edit</a> <a href="#">Delete</a>

Below the table, the following details are shown:

Commodity Code: 74070702530  
Item Detail: RF-30REFRIGERATED HOLDING, TRANSPORT CARTS DUAL TEMP CONVERTIBLE UNITS COLD/FREEZE, MOBILE, STAINLESS STEEL Energy Star  
Contractor: Ruler Fixture, Appliances  
Contract: 740.A1

At the bottom of the item details, there are two sections:

- Add Note to Item:** A text input field with a red border.
- Attach File to Item:** A button labeled 'Choose File' and the text 'No file chosen'.

### Add attachment

After an item is added to a cart, users have the ability to add an attachment to the purchase order to be submitted to the Contractor (or Dealer). This functionality allows the purchaser to include pertinent information such as delivery location, price sheet, dimensions, or any other additional details regarding the order.

If an order has multiple items for multiple Contractors (or Dealers), users are able to add an attachment for each line item so that only the specified Contractor is sent the attached file.

**IMPORTANT:** Please allow the page refresh before continuing – A spinning wheel will show until the attachment is submitted. This process may take up to 30 seconds.

The screenshot shows the 'My Cart' page with a table containing one item:

Item	Shipping Address	Price	Qty	UOM	Subtotal	
686C-686C Freightliner Sprinter 3500 170" WB 1 TON FULL SIZ	111 E 17th Street Austin, TX 78774 Delivery days: 120	\$47,662.00	1	EA	\$47,662.00	<a href="#">Edit</a> <a href="#">Delete</a>

Below the table, the following details are shown:

Commodity Code: 07190101579  
Item Detail: 686C-686C Freightliner Sprinter 3500 170" WB 1 TON FULL SIZE EXTENDED CARGO VAN , 686-CYL  
Contractor: Fort Worth Freightliner  
Contract: 071-A1  
Contract Award Level: 7

At the bottom of the item details, there are two sections:

- Add Note to Item:** A text input field.
- Attach File to Item:** A button labeled 'Choose File' and the text 'No file chosen'.

### Edit/Delete Item(s)

Purchasers can make edits to an item after adding them to a cart. The quantity can be updated on the My Cart screen. By using the “Edit” button located next to each item in a cart, purchasers can easily edit item information such as quantity, delivery date, miles to deliver, shipping address, and charges and options.

Purchasers can use the “Delete” button to quickly remove items from their cart and check out without having to create a brand-new cart.

## My Cart

Item	Shipping Address	Price	Qty	UOM	Subtotal	Edit	Delete
Paper Copy Cover 17X11		\$21.75	1	REAM	\$21.75	Edit	Delete

Delivery days: 2

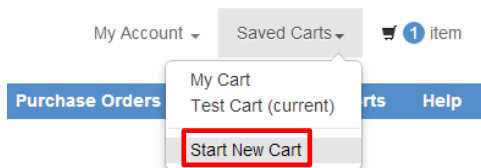
Commodity Code: 64533 Pickup Date: 3/3/2022  
Item Detail: Hammermill Color Copy Cover Paper, Ledger Paper Size, 100 Brightness, 60 Lb, Photo White, Pack Of 250 Sheets  
Contractor: Office Depot, LLC  
Contract: TXMAS-20-7501  
Min. Order Quantity: 1

## Multi-Cart Functionality

Purchasers have the ability to save multiple shopping carts in Texas SmartBuy to support internal decision-making and save work-in-progress. These carts can be saved under different names, added, shared with others, or deleted at the purchaser’s discretion.

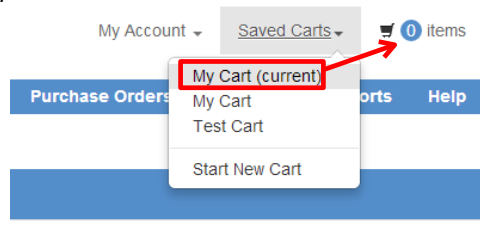
### Starting a New Cart

Once logged in to Texas SmartBuy, from any page, click the “Saved Carts” dropdown menu. Here you will see all of the Saved Carts that you have at the time. Select “Start New Cart” to create a new Cart.



Upon selecting “Start New Cart,” the current page will be refreshed a new Cart will be created. By default, this new cart will be named “My Cart” and will now be selected as the Current Cart. You will see your new cart with a message notifying you that your cart is empty.

*\*\*Note: At any time, only one Cart is marked “(current).” This indicates which Cart items will fall into when shopping. Also, the cart designated as “current” contains the items that are being displayed in the mini cart count.*



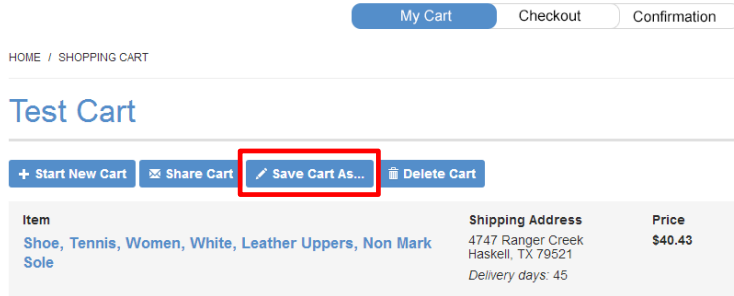


The name of this cart can be changed, and we will cover this in the next section.

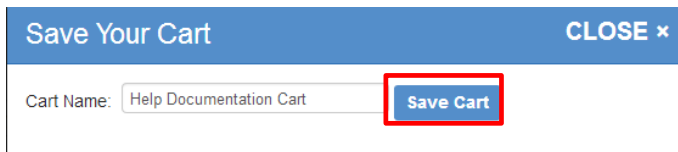
## Renaming a Cart

*IMPORTANT: In order to change the name of a Cart, at least one item has to be in the Cart.*

To rename a Cart, navigate to the Cart page in which you wish to rename. On the Cart page, click the option that says “Save Cart As...”



Upon clicking this button, a modal will pop up prompting you to change the name. Type in the desired name, and then click the “Save Cart” button.

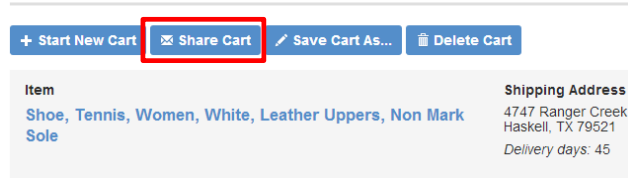


*IMPORTANT: Once you have completely checked out, your current cart will be removed. To save your order to re-order at another time, use the Favorite Order feature on the Check Out screen.*

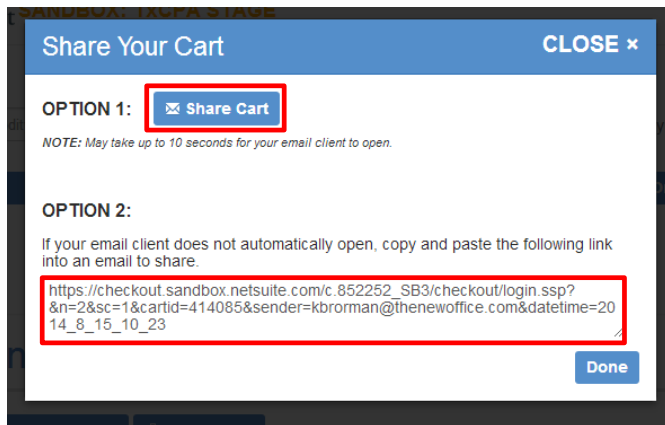
## Sharing a Cart

To share a Cart, navigate to the Cart page in which you wish to share. On the Cart page, click the option that says, “Share Cart.”

## Help Documentation Cart



Upon selecting this option, a modal will pop up with 2 different options.



Option 1 – Share the Cart through an email client. With this option, click the “Share Cart” button and your default email client will pop up with a new email being drafted. The subject line will be automatically populated, and the body of the email will contain the URL to the saved Cart.

Option 2 – Manually share the Cart. If Option 1 is not working properly with any email client you have set up on your computer, simply copy the URL provided in the box, paste it in the body of an email, and manually send the cart to the preferred recipients.

### Deleting a Cart

Unlike renaming or sharing a Cart, you do not have to have any items in the Cart in order to delete it. To delete a Cart, navigate to the Cart page that you would like to delete. Whether you have items in the cart or not, simply select the button that says “Delete Cart” to permanently delete the cart.

## My Cart

[+ Start New Cart](#) [Share Cart](#) [Save Cart As...](#) [Delete Cart](#)

<b>Item</b> Shoe, Tennis, Women, White, Leather Uppers, Non Mark Sole	<b>Shipping Address</b> 4747 Ranger Creek Haskell, TX 79521 Delivery days: 45
--	--

HOME / SHOPPING CART

## YOUR SHOPPING CART IS EMPTY

Search for items using the search bar.

[Delete Cart](#)

## TXMAS Quotes

All TXMAS purchase orders must be issued from the Texas SmartBuy system to be eligible for contract pricing. The Contractor will not ship any products or provide related services until receipt of a Purchase Order generated by the Texas SmartBuy system.

**PO's containing quotes will be placed on hold before generating a PO and reviewed by SPD Contract Management. They will contact you with any questions about the quote and the system will notify you once it has been approved and the PO is generated. While it is being reviewed it will show in your My Account area under Purchase Requisitions with the status of Requisition on Hold.**

## Purchase Requisitions

Showing 1 - 15 of 15

Requisition Date 4/12/2022	Requisition Total \$25,150.00
Requisition Number 1562485	Status Requisition on Hold

For certain TXMAS contracts, purchasers will need to add quote items to cart to create a Texas SmartBuy purchase order.

**STEP 1:** Search for quote item(s) on TXMAS contracts by using the keyword QUOTE in search bar.

**STEP 2:** Find the service quote or other quote item available from the TXMAS Contractor and add that item to cart.

**STEP 3:** In the Add to Cart view, update the Item Quantity to the dollar amount of the quote and select Add to Cart.

**STEP 4:** On the My Cart screen, add the contractor quote as an attachment and add a note, if needed. To remove an attachment, select the black X button to the right of the attachment link.

Figure 4.0 – Adding note and attachments to a TXMAS Quote line item

## My Cart

[+ Start New Cart](#) [Share Cart](#) [Save Cart As...](#) [Delete Cart](#)

Item	Shipping Address	Price	Qty	UOM	Subtotal	
Paper Copy Cover 17X11		\$21.75	1	REAM	\$21.75	<a href="#">Edit</a>
Delivery days: 2						<a href="#">Delete</a>

Commodity Code: 64533 Pickup Date: 3/3/2022  
Item Detail: Hammermill Color Copy Cover Paper, Ledger Paper Size, 100  
Brightness, 60 Lb, Photo White, Pack Of 250 Sheets  
Contractor: Office Depot, LLC  
Contract: TXMAS-20-7501  
Min. Order Quantity: 1

Add Note to Item  Attach File to Item

wait until the page refreshes to store your note and/or attachment

No file chosen

**IMPORTANT:** Please allow the page to store the attachment and/or note and refresh before selecting the “Proceed to Checkout” button. A spinning wheel will show until the note is submitted. This process may take up to 30 seconds.

## Checkout

After a user selects their preferred items and fills their cart, they are now ready to check out. The “Checkout” screen in Texas SmartBuy allows the purchaser to purchase items, select destinations for billing, and provide shipment tracking information. To continue to Checkout, select the “Proceed to Checkout” button at the bottom of the Cart screen

**Order Total: \$21.75**

[Search for More Items](#) [Print](#) [Export Cart to CSV](#) [Proceed to Checkout](#)

## Select Billing Address

Texas SmartBuy allows users to define a *Default Billing Address* for the most common transactions. On the Checkout page, purchasers can use their default billing address or select from other designated billing addresses. Ad hoc billing addresses are not allowed. Purchasers should contact their Agency/SmartBuy Members superuser to request additional billing addresses or revisions.

### Default Billing Address

The pre-defined billing address, or *Default Billing Address*, is the address that will be automatically loaded onto the checkout screen...

### Select a Billing Address (Required)

#### Billing Address

Location Code, Street, City or Zip

123123

Amy B

123 Test Dr.

Austin, TX 78745

*NOTE: The Default Billing Address can be updated on the Addresses page in the My Account area.*

### Internal Tracking Number

The Internal Tracking Number is a required field that allows the purchaser to easily track a Texas SmartBuy purchase order using an internally assigned requisition or purchase order number or another designation that can help the purchaser identify a purchase. The Internal Tracking Number input field is found in the center of the checkout screen. This number is also listed on each PO record in the Purchase Orders list under My Account.

Enter Internal Tracking Number (required)

Internal Tracking Number

### Add Note to entire order

A purchaser can add a custom note to the entire order as opposed to the line item level. "Header-level" Notes will print on each resulting PO and can be helpful for providing additional information - other than the item list, address, or tracking number - to multiple contractors. If you have longer notes you can attach a document containing the information and will be included with the PO to the Contractor.

### How to edit My Cart in Checkout process

A purchaser can edit and change items in the cart during checkout process by simply selecting the "Edit Order" option in the "Order Summary" section of the Checkout page. This will reload the My Cart page and allow a purchaser to edit quantities for selected items or add/delete items if necessary.

Order Summary Edit Order


Item	Shipping Address	Price	Qty	UOM	Subtotal
Paper Copy Cover 17X11		\$21.75	1	REAM	\$21.75

Delivery days: 2

Commodity Code: 64533  
Item Detail: Hammermill Color Copy Cover Paper, Ledger Paper Size, 100 Brightness, 60 Lb, Photo White, Pack Of 250 Sheets  
Contractor: Office Depot, LLC  
Contract: TXMAS-20-7501  
Min. Order Quantity: 1

### My Account

Agency and SmartBuy Members sign in to TxSmartBuy.com using an e-mail address and password. All purchasers will be required to log in before checking out. The sign-in button can be found at the top of the home page, to the right of the Search Bar.

   Items

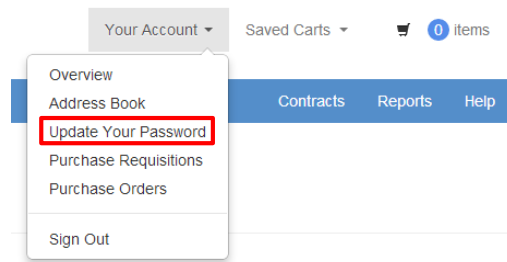
### Update Your Password

Agency and SmartBuy Member purchasers may change or update their password at any time through the My Account section of

Texas SmartBuy.

**STEP 1:** Click the drop-down arrow to the right of the “Your Account” button at the top of the screen.

**STEP 2:** Select the “Update Your Password” option.



**STEP 3:** Enter your current password, followed by the new password of your choice. Confirm your new password once more to ensure accuracy and update your account.

### Security questions

The security questions linked to your account may also be changed in the “My Account” area in the “Update Security Questions” section.

### Purchase Requisitions list view

After the Checkout process is completed, a new requisition will be added in the Purchase Requisitions section. If the status shows Pending Approval, the requisition may be on hold for approval.

### Purchase Orders list view

Purchasers can view Purchase Orders submitted for the “Account” section of TxSmartBuy. On the Purchase Orders list view, the following details display for each Purchase Order:

- PO #
- Date
- Contractor
- Purchaser
- Tracking #
- Status

There are two ways to navigate to the Purchase Orders section of your account:

1. Click the drop down arrow to the right of the “My Account” button at the top of the screen, then select “Purchase Orders”.
2. From the “My Account” Overview page, the “Purchase Orders” link in the left-hand column will also load a list of current Fiscal Year Purchase Orders.

## My Account

<b>Overview</b>
Addresses
Update Your Password
Update Your Security Questions
Purchase Requisitions
Purchase Orders
Favorite Orders

### Purchase Order Filters

The Purchase Orders list view can be narrowed to search for a specific purchase order or group of purchase orders by using the filters at the top of the list. Filters can be used individually or in combination to create custom lists of purchase orders.

The filters available are:

Purchase Order Number	Contractor	Internal Tracking Number	Purchaser
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date Range	Start Date	End Date	
-- <input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="Search"/>	<input type="button" value="Clear Filters"/>		<input type="button" value="Export Results"/>

To view previous fiscal purchase information be sure to add the appropriate date range in the filter area.

#### *Purchase Order Number*

Enter an 8 digit purchase order to find a specific purchase order.

#### *Contractor*

Enter any portion, or group of letters, of a Contractor's name to narrow the list of purchase orders to contractors containing the information entered. (E.g. entering "Industries" will return results for any contractor whose name contains the word "Industries," whereas entering "Ind" will return results for any contractor whose name contains the "Ind" letter combination.)

#### *Internal Tracking Number*

Enter the Internal Tracking Number used on any purchase order to find that specific purchase order.

#### *Purchaser*

Enter the name of a purchaser to see any purchase orders associated with their name.

#### *Date Range*

Using the Date Range filter will narrow the list of purchase orders to orders created within that specific date range. Ranges include: this week, this month, this fiscal year, last week, last month, last fiscal year, and custom.

#### *Start Date/End Date*

By selecting custom in the Date Range, the list can be filtered to narrow the list to any date range. Enter the start and end dates of the range desired.

After entering all the required filters, click the Search button to filter the purchase order list. To return to the unfiltered list, click Clear Filters.

## Purchase Order Change Notice / PO Cancellation

A purchase order change notice, or POCN, is created when a purchaser goes back to a previous order and makes changes to an order. Purchasers can edit purchase order details, including quantity, delivery date, and shipping address. The following sections go into further detail about the specific changes.

### Changes to quantity, delivery date, shipping address, and more

**STEP 1:** Navigate to the Purchase Orders screen by viewing the "My Account" drop-down menu and selecting "Purchase Orders."

**STEP 2:** Select the "View Details" button on the Purchase Order listing to view and make changes.

*Figure 5.0 – Purchase Order listing*



## My Account

Overview
Address Book
Update Your Password
Update Your Security Questions
Purchase Requisitions
<b>Purchase Orders</b>

## Purchase Order

Showing 1 - 14 of 14

Purchase Order Date 4/24/2014	Purchase Order Total \$173.28	<a href="#">View Details</a>
Purchase Order Number 80000663	Status Approved	Tracking # 123456789
Contractor Vulcan Construction Materials LP, San Antonio TX	Purchaser Andrew Degiorgio	

**STEP 3:** On the Purchase Order Details screen, click “Edit” on the line item to make changes.

## Purchase Order Details

Order Number: **80000663** [Cancel Purchase Order](#)

Order Date 4/24/2014	Order Total \$173.28	Order Status Approved
-------------------------	-------------------------	--------------------------

Line Item #	Name	Address	Qty	Price	Total	
1	Flexible Base	9000 Alama Dr. Lakeview TX 79239	24	\$7.00	\$168.00	<a href="#">Edit</a>
		Deliver By: 4/25/2014				

**STEP 4:** On the pop-up window, make the necessary changes to quantity and select “Update”.

*TIP: Purchase Order Change Notices take up to 15 minutes to generate. The Purchaser and Contractor will receive an email with a PDF attachment of the POCN.*

*TIP: Once all updates have been made, please allow up to 30 seconds for the page to submit. The popup window will disappear when the update is complete.*

**If your PO was delivered more than a year ago or if it contains quote hold items you will be asked to enter a POCN request.**

## Purchase Order Details

[Back to results](#)

PO Number: **21055932** ([View PDF](#))

Agency/CO-OP: Comptroller Of Public Accounts - 304

Tracking Number: testin quote hold

[Request PO Changes](#)

[Cancel PO](#)

[Reorder PO](#)

[Share PO](#)

Attach File:  No file chosen

Order Date 4/12/2022	Order Total \$25,150.00	Order Status PO Issued
-------------------------	----------------------------	---------------------------

Line #	Item	Commodity	Address	Qty	UOM	Price	Total
1	Quote TXMAS-21- 36001 Mohawk Carpet Distribution.	36076	304 2I-40 Fort Worth Audit 6320 Southwest Blvd	25000	EACH	\$1.00	\$25,000.00

### For the Requested POCN Changes

**Include:**

- Item(s) that need to be changed current value-> new value
- Items that need to be cancelled if applicable
- Current PO value->new PO total amount
- Any notes that need to be updated

Contract Management will contact you with any questions and if they need you send an updated quote from the contractor to support the changes to the PO.

**Request POCN** CLOSE x

---

**Requested Changes**

Purchase Order: 21055932

Please describe your requested changes below:

Submit Request for POCN Cancel

### Cancel entire PO and Cancellation reason

To cancel a Purchase Order, follow these steps.

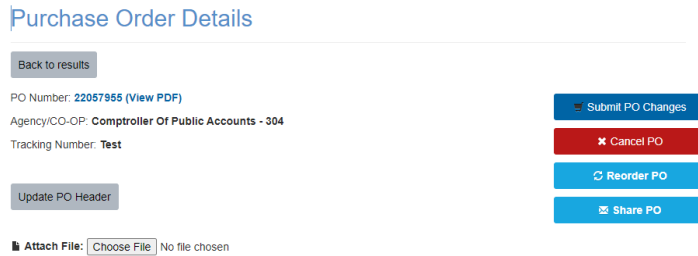
**STEP 1:** Click on the Purchase Orders tab in the left-hand menu within My Account.

**STEP 2:** Click on View Details next to the Purchase Order to be cancelled

Figure 5.3 –Purchase Order listing

Purchase Order Date <b>4/17/2014</b>	Purchase Order Total <b>\$840.00</b>	<a href="#">View Details</a>
Purchase Order Number <b>80000535</b>	Status <b>Approved</b>	Tracking #: <b>987654312</b>
Contractor <b>Vulcan Construction Materials LP, San Antonio TX</b>	Purchaser <b>Jeff Tester</b>	

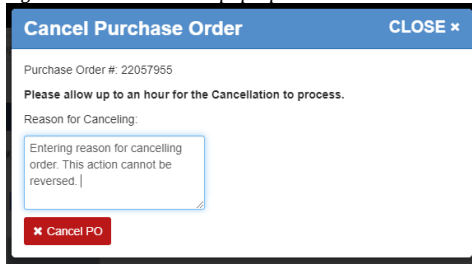
**STEP 3:** Within the Purchase Order Details view, click on the “Cancel Purchase Order” button.



**STEP 4:** When the cancellation pop-up appears, must enter a cancellation reason and select the “Cancel Purchase Order” button. The reason entered here will appear on the Purchase Order Cancellation PDF emailed to the Contractor.

**NOTE:** Please wait for the cancellation pop-up window to disappear. Do not click the Cancel Purchase Order button twice -- the pop-up will disappear automatically once the cancellation has been executed.

Figure 5.5 –Cancellation pop-up



**STEP 5:** An email will immediately be sent to the Purchaser and Contractor that the order has been cancelled. The status of the Purchase Order will change to CANCELLED in the Purchase Orders List.