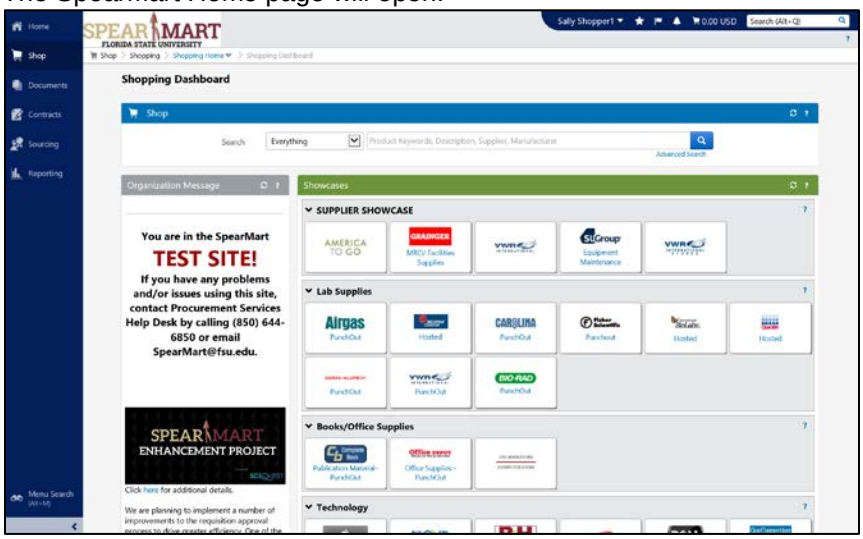
SPEARMART
FLORIDA STATE UNIVERSITY

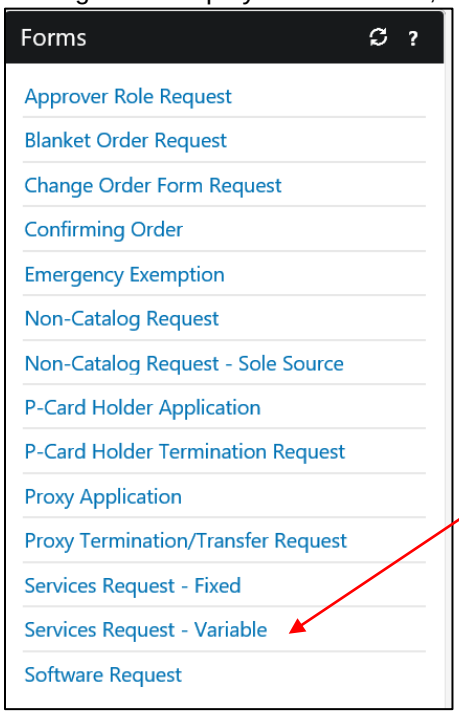
# JOB AID
## Shopping Using a Services Request-Variable Form

Access SpearMart by navigating to https://my.fsu.edu/ and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:

The SpearMart Home page will open.




Shoppers may need to enter an order for another supplier that is not included among the Catalog suppliers. To do this, you will use different forms. Scroll down on the page to find the list of Forms which are found under the catalog icons. The form you will select depends on the type of requisition you want to enter. For this example, we have a supplier that has provided a quote to provide training for a group of new lab employees. The supplier quoted $50 as the hourly rate for training these employees. Therefore, the "Services Request – Variable form is selected.




Select the "**Services Request-Variable**" Form by clicking on the name of the form.

The form will open. First, you must select a supplier. Enter the name of the supplier or click the "Supplier Search" link.

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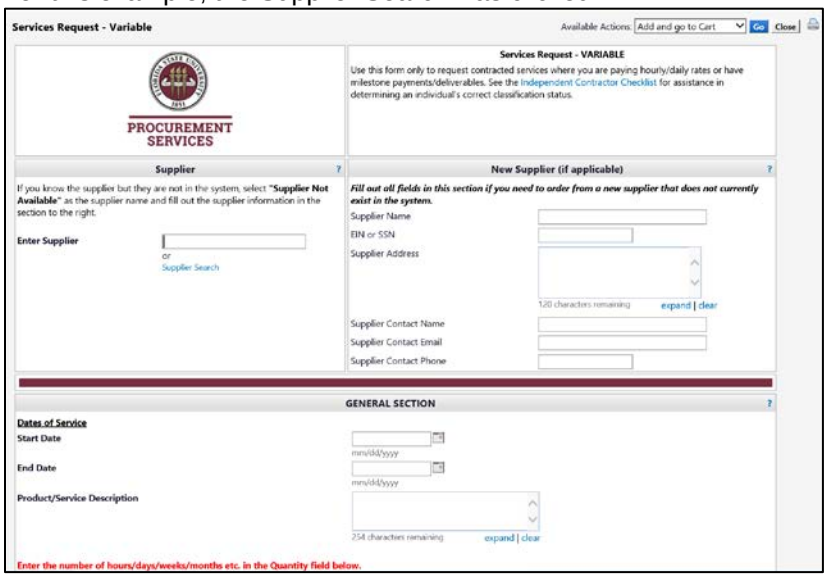
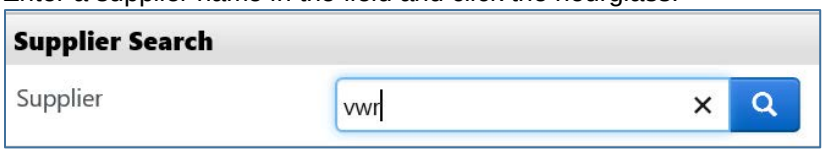
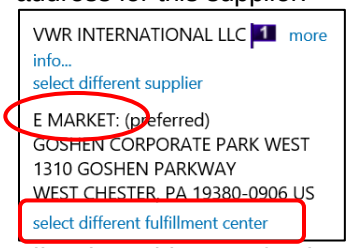
For this example, the Supplier Search was clicked.



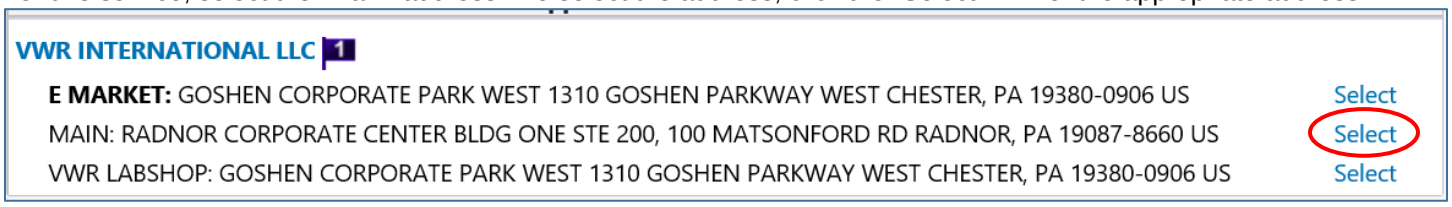

Enter a supplier name in the field and click the hourglass.




The system may populate the field with an address automatically. Check that address to ensure it is not the "EMarket" or "SpearMart" address. This address cannot be used with a form. Click "select different fulfillment center" to select another address for this supplier.




All active addresses for the supplier will come up on the list. For this particular supplier, VWR, there are several choices. For this service, select the "Main" address. To select the address, click the "Select" link for the appropriate address.




Once selected, the supplier address will populate in the form. If you need to change the address, click "select a different fulfillment center".

**Special Note:** For SpearMart suppliers, the SpearMart address is the default address. When using the Services Request – Variable Form, you must ensure that you are not using an address that says "EMarket" or "SpearMart". To change an address, click "select a different fulfillment center". Orders will fail if the SpearMart catalog address is used with any non-catalog form including the Services Request - Variable form.

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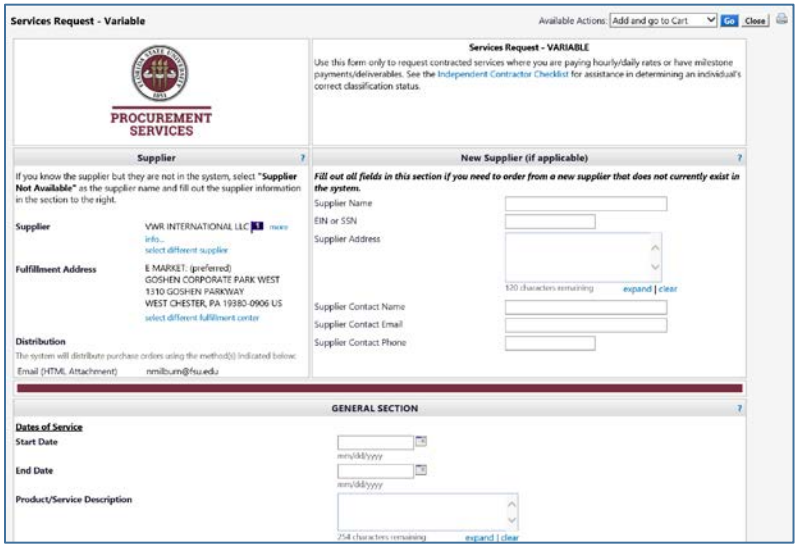
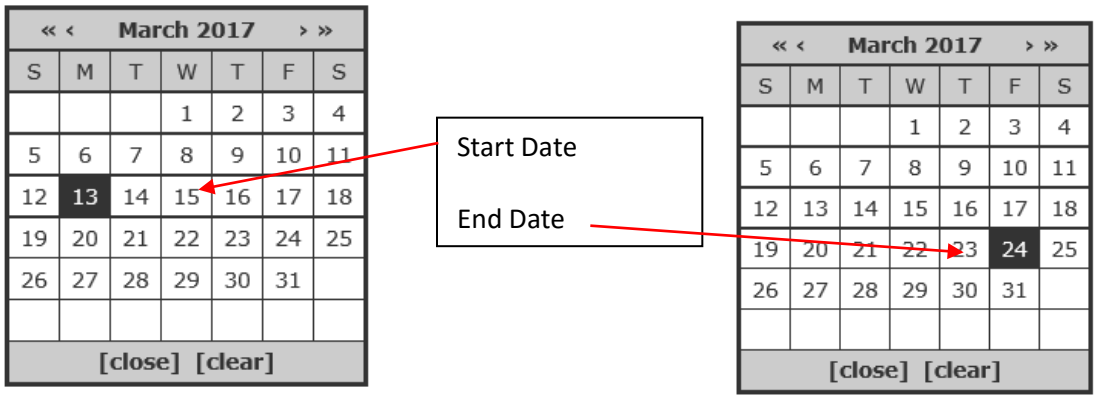
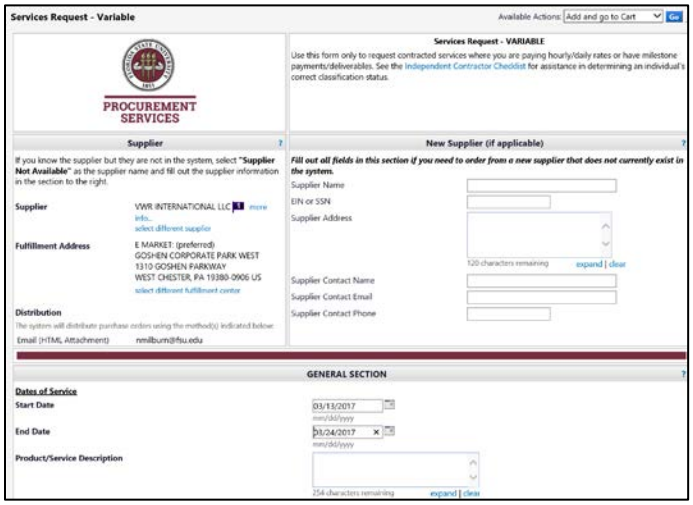
Next, enter the start date or select the calendar icon to select the date.




Select the date by clicking that day on the calendar. For this example, March 13 is selected for the start date and March 24th for the end date since this service will be performed over a two-week period. The end date is the last date that the service will be performed.




These dates will populate the fields in the form when selected. If the service lasted only one day, you would pick a the same date as the start date.




Now, enter the description of the service that will be provided in the Product/Service description box. Then enter the Quantity. For this example, 20 hours are the maximum the department will allow due to the costs of the training. Enter "20" in the box. Then enter the cost per Hour/Day/Month, which as stated above is $50. Note the special instructions in red regarding these two fields.

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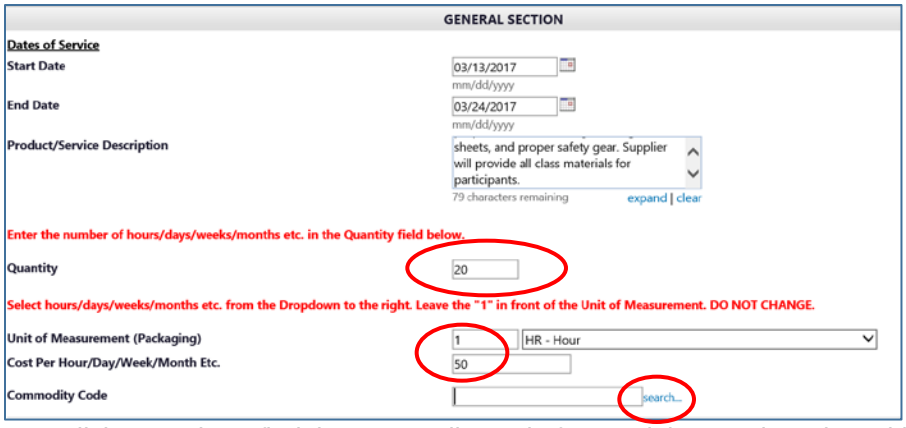
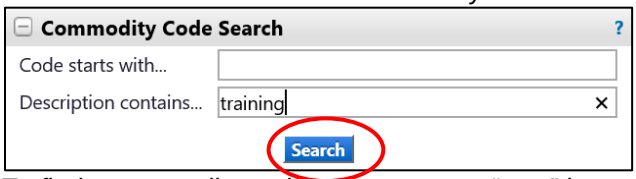
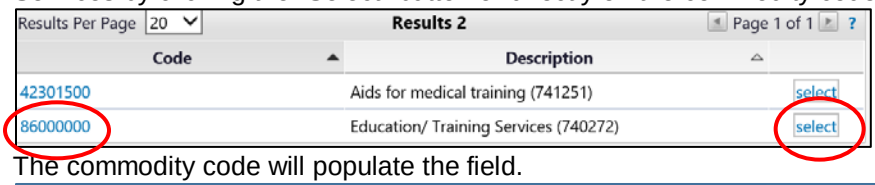



Next click "search" to find the commodity code for a training service, since this is for training classes.

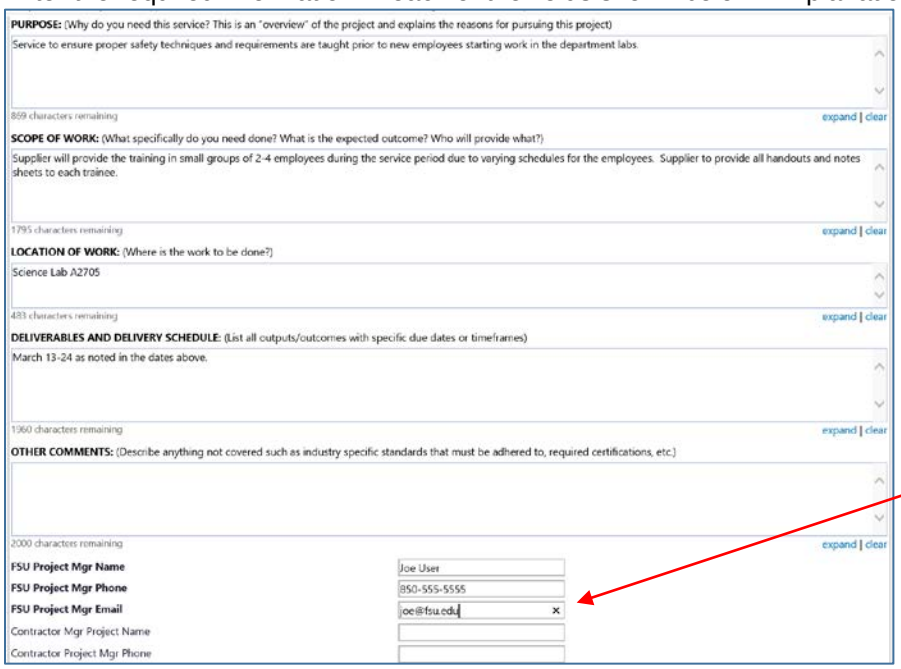



To find a commodity code, you can enter "serv" because all service commodity descriptions contain these letters or part of the description of the type of service. Since we already know this service is for training, that is what was entered in this search. Click "Search". The search results show two choices for "training" services. Select the "Education/Training Services by clicking the "Select" button or directly on the commodity code.




The commodity code will populate the field.

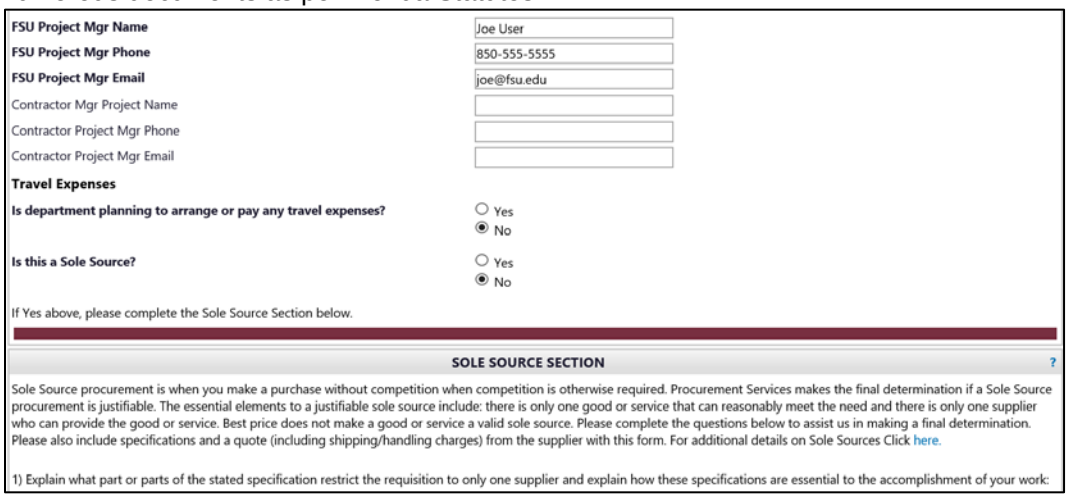
Enter the required information in each of the fields shown below. Explanations as to what is needed are above each field.



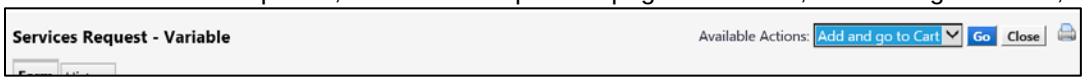

Also required is the full name, full phone number and email address for the FSU contract manager. This is the individual at FSU that is responsible to ensure the supplier provides the full service and they certify payment is due to the supplier.

Click the appropriate buttons to answer the questions about paying for travel and whether the service is a Sole Source or not. In this example, "No" was selected or both questions. If you answered "Yes" to either, there are additional fields that must be filled out. See below.

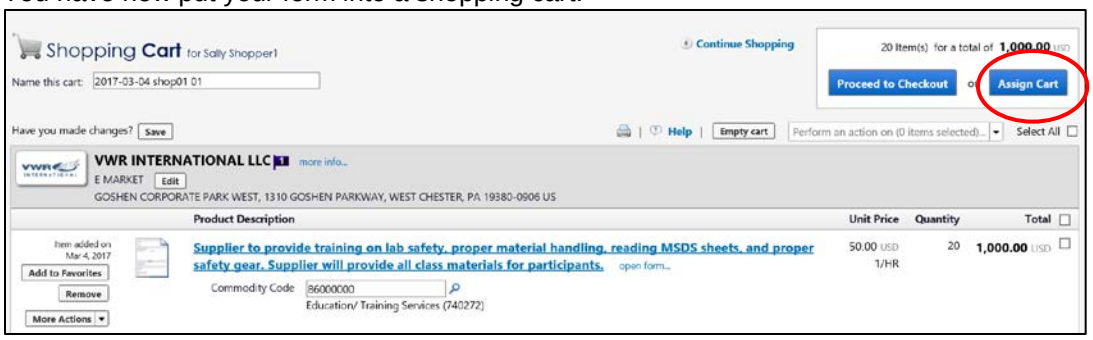
**Note:** Travel expenses that are paid via a purchase order must be paid in accordance with Florida Statutes. It is recommended to have the supplier include their travel expenses in their pricing quote total to avoid having to submit numerous documents as per Florida Statutes.




When the form is completed, scroll to the top of the page and select, “Add and go to Cart”, then click “Go”.



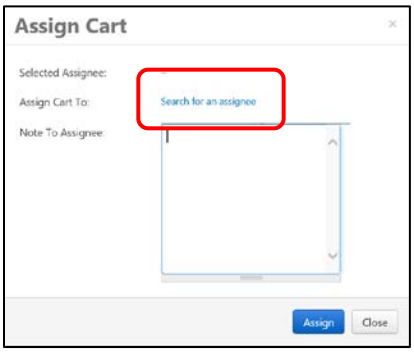

You have now put your form into a shopping cart.




Once back in the shopping cart, there are two choices. You can either assign the cart to your Requester or proceed to checkout if you know the accounting codes to enter. Both are outlined below.

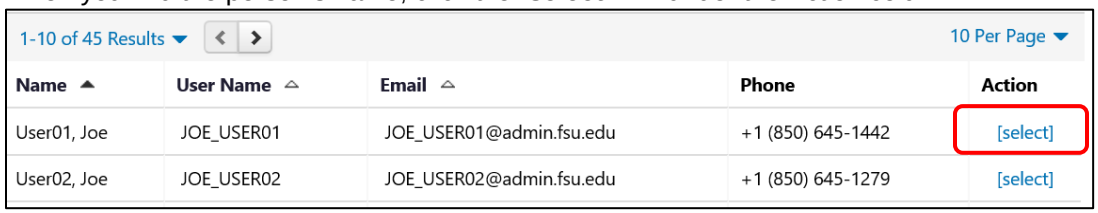
Click “Assign Cart”

1. **Assign Cart:** Once you click “**Assign Cart**”, the below page will show up.

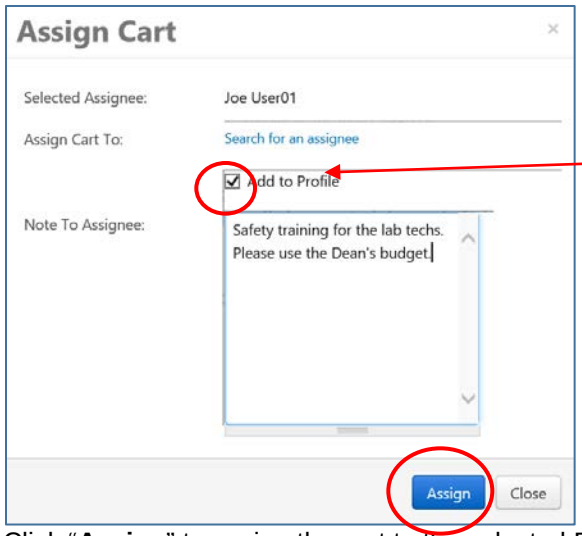



Click “**Search for an Assignee**” to find your Requester in your department to assign the cart to. Enter their first and last name in the “User Search” below.

When you find the person's name, click the "**select**" link under the Action column.

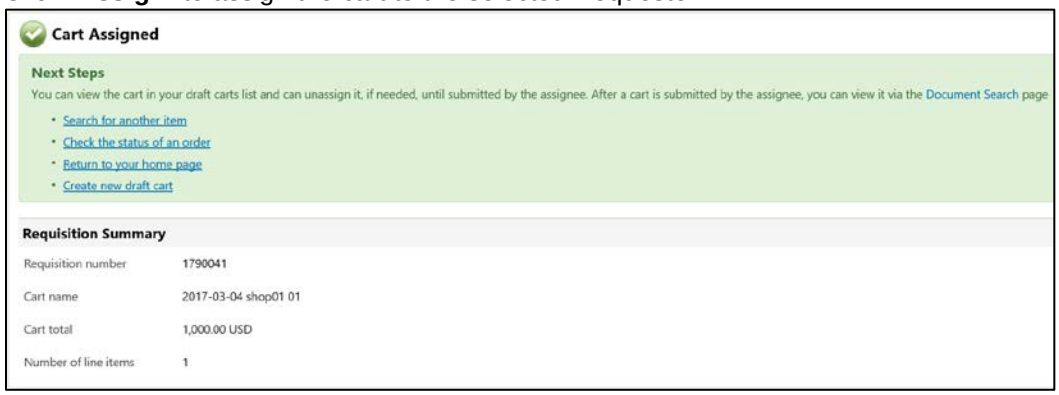



Enter a note for the Requester as needed to provide order information, justification, or budget information to the Requester so they know how to code the requisition. You can also click the "Add to Profile" box to save this Requester so you can search from your profile going forward.




Click "Add to Profile" to save this assignee. Next time you want to assign a cart, they will be saved in your profile.

Click "**Assign**" to assign the cart to the selected Requester.




You have successfully assigned your cart to a department Requester!

**"Proceed to Checkout"** is the other option is to enter the accounting data for your Requesters and the Shopper can enter the requisition data and then assign the cart to their Requester.

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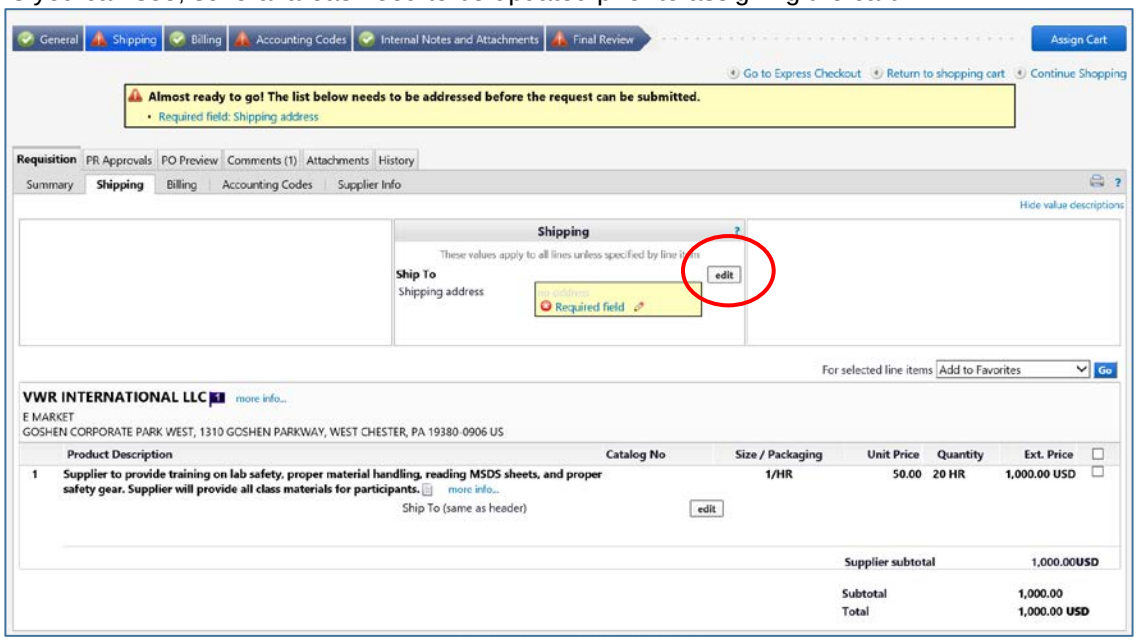
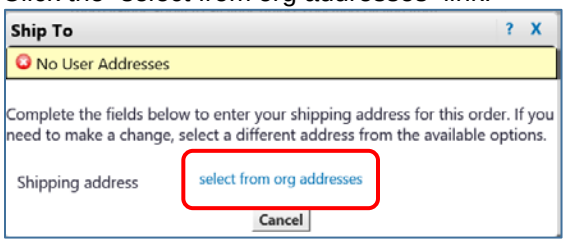
2. **Proceed to Checkout:** Once you click "**Proceed to Checkout**", the below page will show up. You can now enter the budget and shipping information.

As you can see, several areas need to be updated prior to assigning the cart.



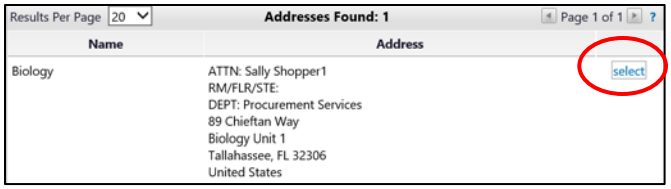

Click the "**Edit**" button in the "Shipping" box to add or update the shipping address. For this example, no address exists, so the address needs to be added.

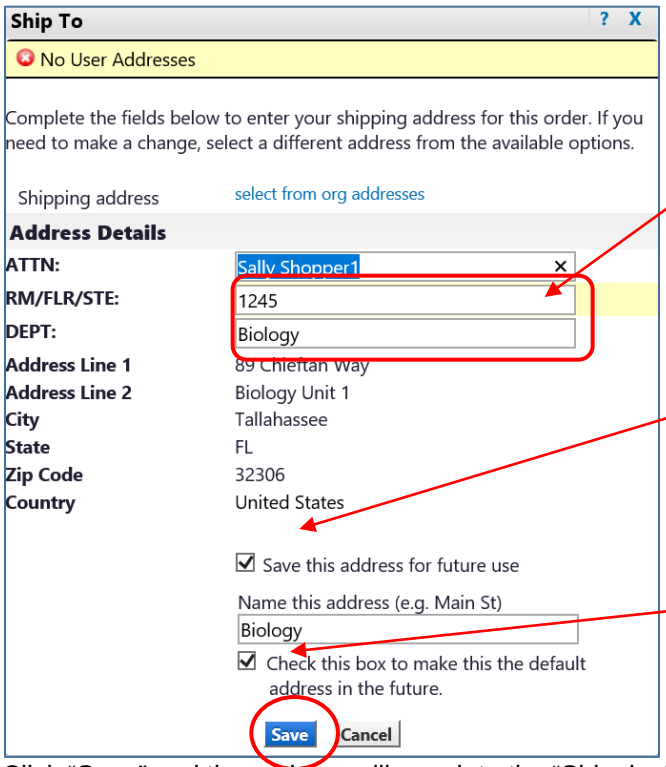
Click the "select from org addresses" link.




In the search box, enter part or all of the name of the building. For this example, "biology" was entered.

The one building that contains "biology" in it comes up, so click "select" to choose this address.



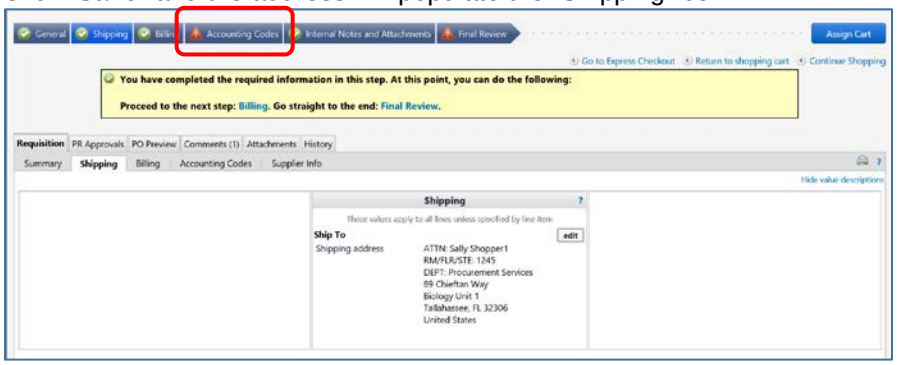




You must add a room number and update the department name in the appropriate fields.

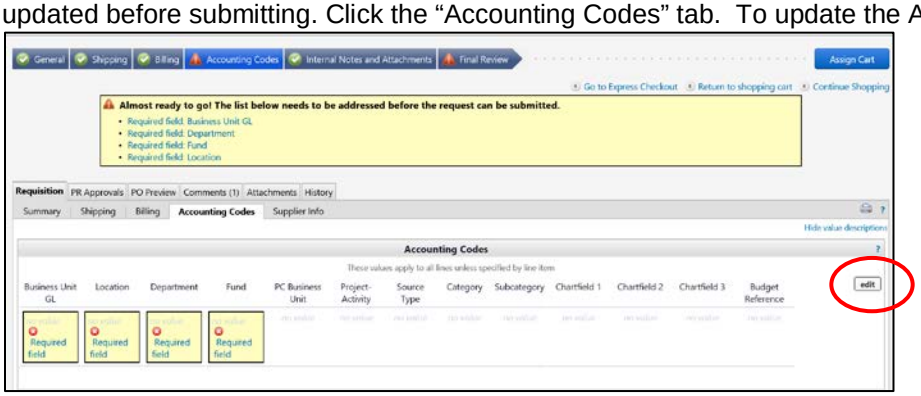
To save this address in your profile, you can click the "**Save this address for future use**".

To save this as a default, click the "**Check this box to make this the default address in the future**" box.

Click "**Save**" and the address will populate the "Shipping" box.

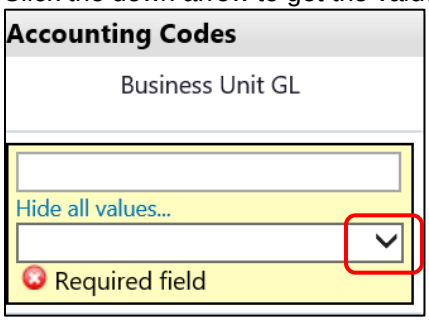



As you can see above, the "Accounting Codes" tab has a red exclamation mark, which means it is information must be updated before submitting. Click the "Accounting Codes" tab. To update the Accounting Codes, click the "**edit**" button.

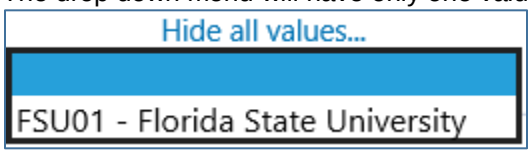



The first field is the "Business Unit GL". Click the "**Select from all values**" link.

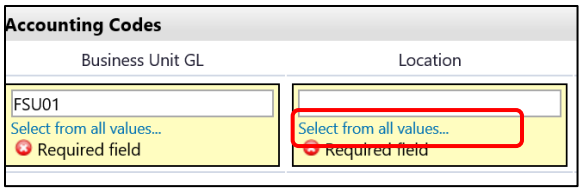
Click the down arrow to get the value “FSU01”.



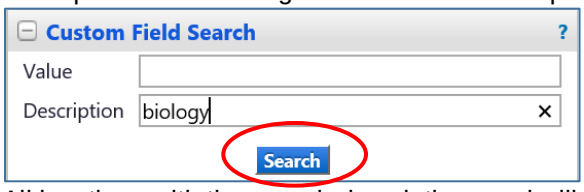

The drop down menu will have only one value to select. Select “FSU01” and it will populate the field.



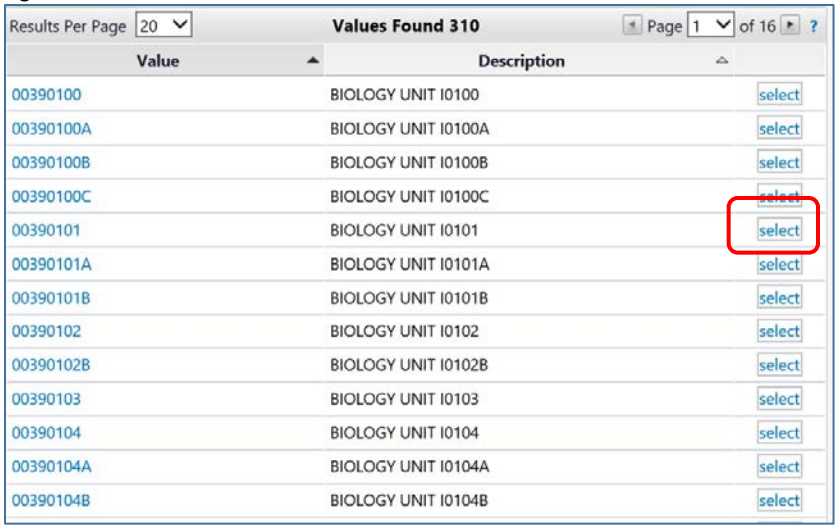

The next item is Location. Click “**Select from all values**”.




Enter part of the building name. For this example, “biology” was entered.




All locations with the search description used will come up as choices. Select a choice by clicking “**select**” button to the right of the location.




The system will take you back to the page and populated the field.

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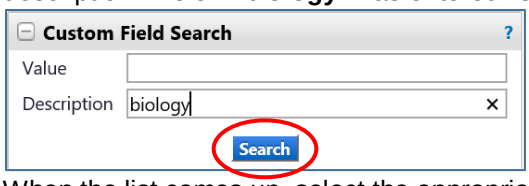
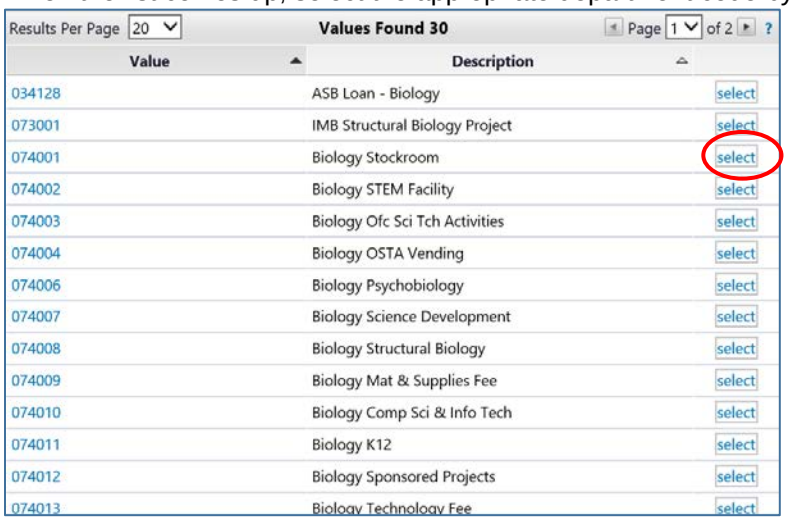
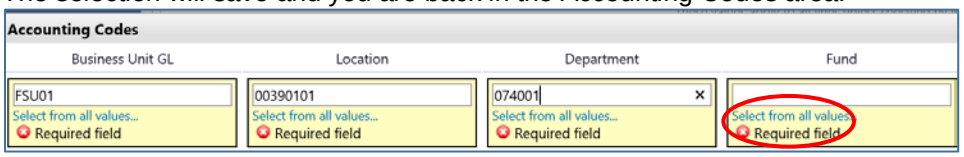
The next step is to enter the Department ID. You can enter the department number or as in this example, enter a partial description. Below "**biology**" was entered. Click "**Search**".



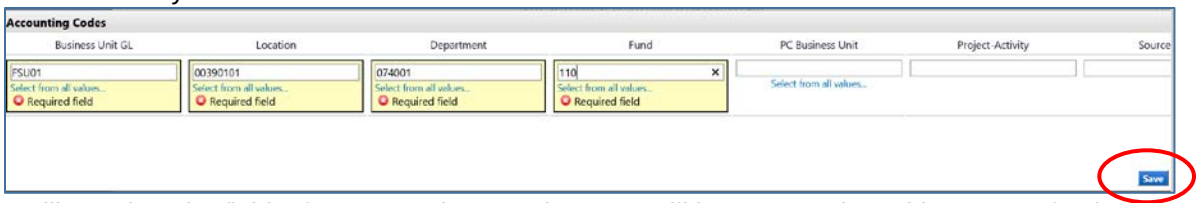

When the list comes up, select the appropriate department code by clicking the "**select**" button.




The selection will save and you are back in the Accounting Codes area.




If you know the Fund Code needed, you can enter it directly in the field. For this example, the correct fund "110" was entered directly.




It will populate the field. If you are using a project, you will have to continue this process for the PC Business Unit, Project-Activity, and additional chartfields as required. Click "**Save**" when you have completed the accounting codes.

The full string will now be visible and all the top tabs have green checkmarks, so the requisition can be assigned to your Requester. Click "**Assign Cart**".

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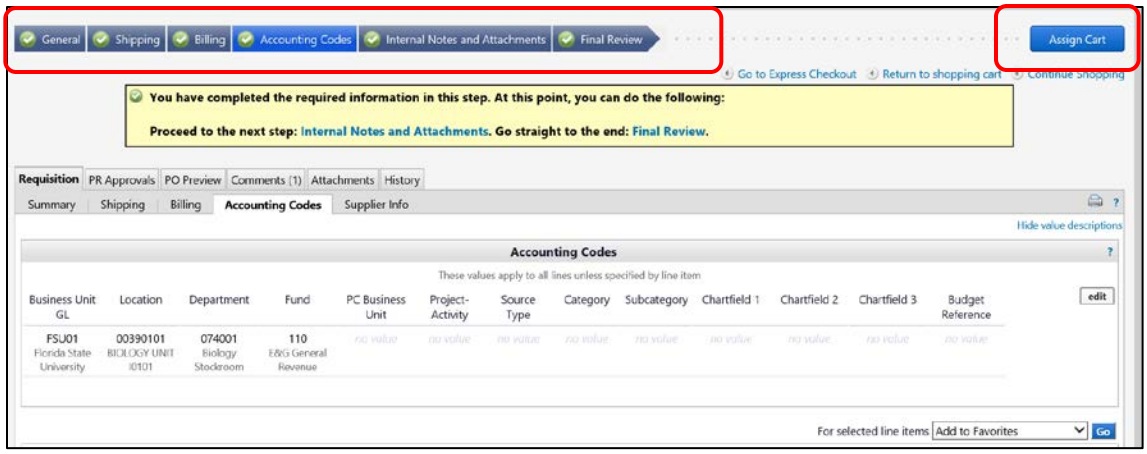
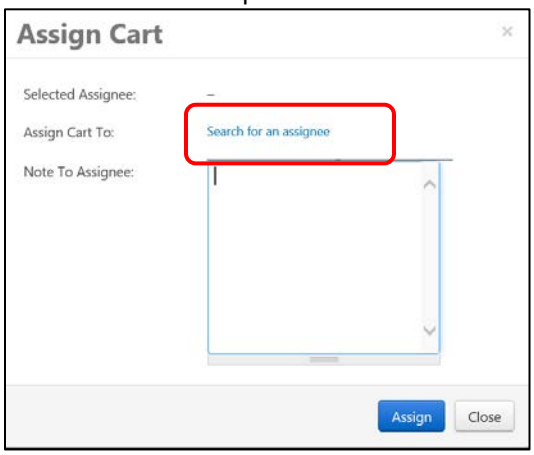
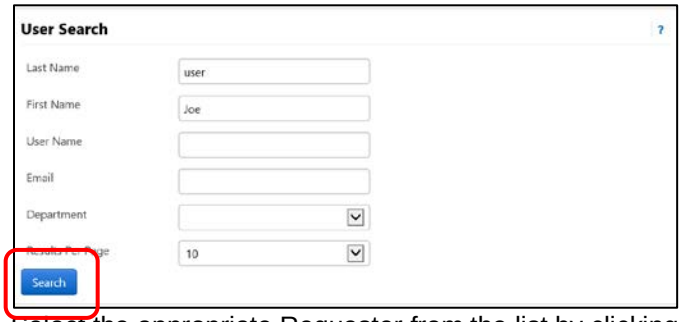


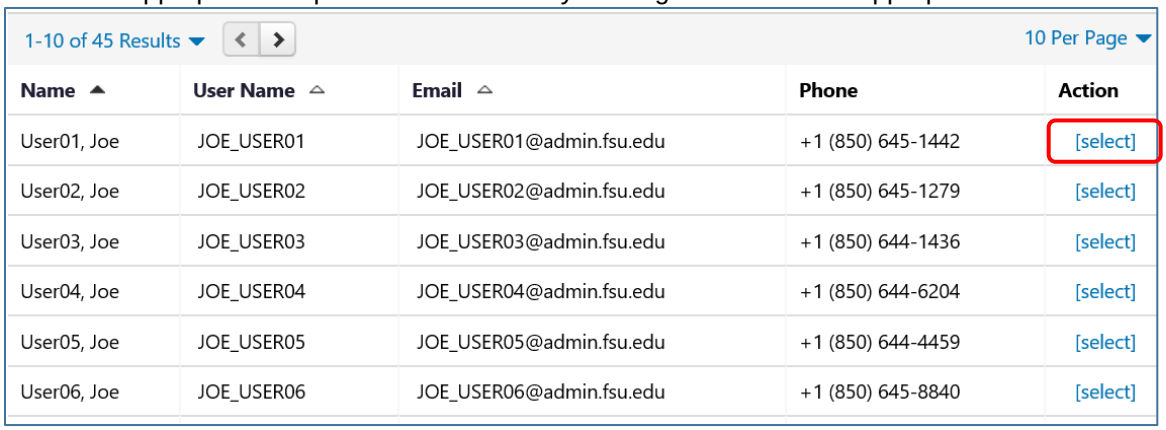

The below box will open and click "**search for an assignee**".




Click "**Search for an Assignee**" to find your Requester in your department to assign the cart to. Enter their first and last name in the "User Search" below.




Select the appropriate Requester from the list by clicking "Select" on the appropriate line.

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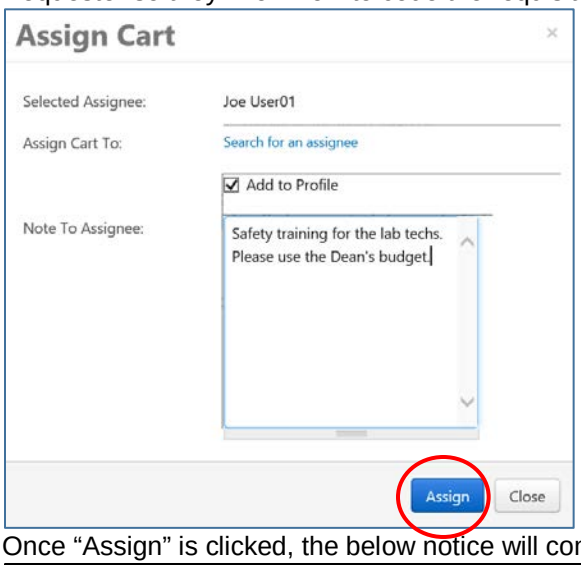
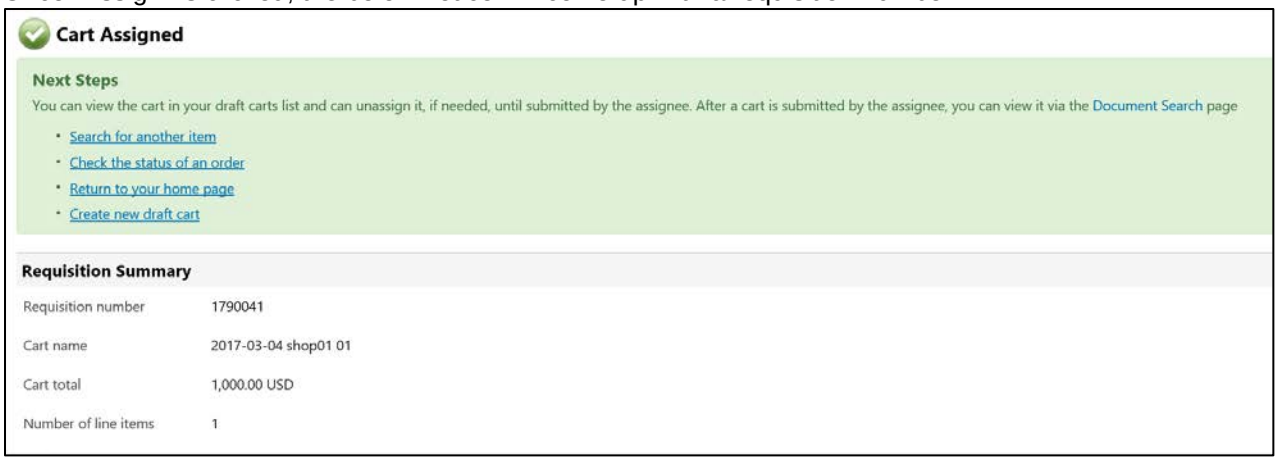
Enter a note for the Requester as needed to provide order information, justification, or budget information to the Requester so they know how to code the requisition.




Once “Assign” is clicked, the below notice will come up with a requisition number




You have successfully assigned your cart!

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