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**TxSmartBuy Overview and Resources**

This guide documents the high level steps for using the TxSmartBuy 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 TxSmartBuy 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 State of Texas CO-OP can place orders in the system.

**How can a Local Government get access?**

Become a State of Texas CO-OP member and for a $100 annual cost recovery fee, your entity can purchase from the TxSmartBuy system and use other statewide purchasing contracts.

**System Requirements and Browser Compatibility**

<table>
<thead>
<tr>
<th>Browser Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome 34+ (Recommended)</td>
</tr>
<tr>
<td>Firefox 26+</td>
</tr>
<tr>
<td>Internet Explorer 10+</td>
</tr>
</tbody>
</table>

**NOTES:**

- Allow pop-ups to support several features in the TxSmartBuy 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 TxSmartBuy 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.

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 TxSmartBuy 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 create search results specific to that category.

**Browse items by contract**

At the upper right of the TxSmartbuy.com home page under the Agency/CO-OP 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 TxSmartBuy 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.

**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
- Line Item #
- Maintenance Section

*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:

- Preferred Term, High to Low (default sort order)
- Relevance
- Price, Low to High
- Price, High to Low
- Commodity Code, Low to High
- Commodity Code, High to Low
- Award Level, Low to High
- Award Level, High to Low

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.

**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.
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.

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

![Comparison Results]

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

![Item Comparison Table]

**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.

![Add to Cart]
**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 green “Export to CSV” button. This will automatically download a CSV file.

*NOTE: Some of the newer browser versions may not download the file. We are working to resolve this, but in the meantime, try another browser such as Firefox.*

**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 TxSmartBuy username and password. Contractors are encouraged to use this feature to support communication with Agency/CO-OP employees and purchasers to help compile item information for purchasing requests and orders.

The system will be updated soon to allow sharing of a wish list via email. A purchaser authorized to log in to TxSmartBuy can click the link in the email they receive to open the wish list as a cart in the system.

**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 or
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 TxSmartBuy.

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.

Delivery Details for Road Aggregate
When purchasing road aggregate materials, different delivery options will display, including:

- Pickup at Location
- Storage Stockpile
- Roadway Operations

Pickup at Location does not have associated pricing. Storage Stockpile and Roadway Operations will have a delivery cost per ton mile that will be systematically calculated in the Add to Wish List view (including price breaks applied for higher mileage). The delivery subtotal will appear to the right of the Shipping Details heading.
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.
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.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Shipping Address</th>
<th>Price</th>
<th>Qty</th>
<th>UOM</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hot-Mix Cold-Laid Asphalt Concrete</td>
<td></td>
<td>$81.20</td>
<td>24</td>
<td>TON</td>
<td>$1,948.80</td>
</tr>
</tbody>
</table>

Delivery charge: $10.80

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/CO-OP employees and purchasers to help compile item information for purchasing requests and orders.

The system will be updated soon to allow sharing of a wish list via email. A purchaser authorized to log in to TxSmartBuy can click the link in the email they receive to open the wish list as a cart in the system.