**e-SHOP Reference Guide**

**Table of Contents**

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>e-SHOP Reference Guide</td>
<td>1</td>
</tr>
<tr>
<td>Login</td>
<td>2</td>
</tr>
<tr>
<td>e-SHOP Home Page</td>
<td>3</td>
</tr>
<tr>
<td>Understanding the Icons</td>
<td>3</td>
</tr>
<tr>
<td>Tips for Navigating the Home Page</td>
<td>4</td>
</tr>
<tr>
<td>Using the Search Feature in e-SHOP</td>
<td>6</td>
</tr>
<tr>
<td>Basic Search</td>
<td>6</td>
</tr>
<tr>
<td>Advanced Search</td>
<td>7</td>
</tr>
<tr>
<td>Comparison Feature</td>
<td>8</td>
</tr>
<tr>
<td>Search your order history</td>
<td>9</td>
</tr>
<tr>
<td>Ordering in e-SHOP</td>
<td>10</td>
</tr>
<tr>
<td>Ordering from a punch-out site</td>
<td>10</td>
</tr>
<tr>
<td>Ordering from a hosted catalog</td>
<td>11</td>
</tr>
<tr>
<td>Ordering with the non-catalog order form</td>
<td>12</td>
</tr>
<tr>
<td>Completing the order in e-SHOP</td>
<td>12</td>
</tr>
<tr>
<td>Completing the KFS Requisition</td>
<td>15</td>
</tr>
<tr>
<td>Checking order status</td>
<td>17</td>
</tr>
<tr>
<td>Checking order status – Procurement Gateway</td>
<td>17</td>
</tr>
<tr>
<td>Checking Order Status – KFS</td>
<td>18</td>
</tr>
<tr>
<td>Checking Order Status – e-SHOP</td>
<td>19</td>
</tr>
<tr>
<td>Ordering from more than one vendor at a time</td>
<td>20</td>
</tr>
<tr>
<td>Creating Favorite Shopping Lists</td>
<td>22</td>
</tr>
<tr>
<td>Viewing your Favorite Shopping List</td>
<td>23</td>
</tr>
<tr>
<td>KFS Tips</td>
<td>24</td>
</tr>
<tr>
<td>Setting default delivery address</td>
<td>25</td>
</tr>
<tr>
<td>Creating frequently used (favorite) account list</td>
<td>26</td>
</tr>
<tr>
<td>Updating your phone number</td>
<td>28</td>
</tr>
<tr>
<td>Training Resources</td>
<td>31</td>
</tr>
<tr>
<td>Procurement Services Contact Information</td>
<td>31</td>
</tr>
</tbody>
</table>
Login
There are several ways to access e-SHOP.

1. Bookmark the e-SHOP url: https://kfs-prod.adminapps.cornell.edu/kfs/portal.do?channelTitle=e-SHOP&channelUrl=b2b.do?methodToCall=shopCatalogs

2. Use the login link from the Procurement website: www.procurement.cornell.edu

3. Use the login link from the Procurement Gateway: www.gateway.procurement.cornell.edu

4. Use the link from the e-SHOP web page: www.dfa.cornell.edu/procurement/e-shop
5. Use the e-SHOP login link from the KFS Main Menu.

e-SHOP Home Page

The suppliers on the e-SHOP home page are arranged by showcase or product grouping with three exceptions. The first three showcases features Local, Diverse, and On Campus suppliers. The showcases then are sorted by most frequently used items, such as Office Supplies, General lab supplies, Lab equipment and instruments, Life science supply, etc.

Understanding the Icons

Menu options are grouped by related task, i.e., shopping tasks, document related task.

Home

Shop – contains the options related to shopping tasks including product quick search, access to the shopping page, forms, favorites, and access to carts and orders.

- Shopping – This quick search allows you to do a simple item search by keyword, catalog number or CAS number.
- My Carts and Orders – You can access your active cart, draft carts, or view recent orders from this sub-menu.
- Admin – The sub-menu contains options to manage carts assigned to you or that you have assigned to others.
Orders and Documents – items related to Document Search and Approvals are located here.

Search (bottom of the page)

Tips for Navigating the Home Page
1. Close showcases that you don’t use. To close a showcase, simply click on the chevron.

2. Search for a supplier by name using the <Control> “F”.

Computing Center
3. Use the alphabetical supplier listing
   a. Select “Browse: suppliers” from top of the Home page
   b. From the drop down menu, select “Sort by: Alphabetical”

4. Change your home page to the alphabetical supplier listing
   a. Select the drop down arrow next to your name and then select “Set My Home Page”
Using the Search Feature in e-SHOP
The e-SHOP search engine examines all of the supplier hosted catalogs within e-SHOP for a potential match. You can refine your search and compare items using the e-SHOP search engine.

Basic Search
The basic search allows you to type in an item and click “Go” or to refine your search by limiting the categories explored.
1. Use the simple search to find a specific item, such as Bic gel pens.

![Simple Search Example]

2. You can refine your search results using the “Sort by:” drop down menu (red circle below).

![Sort by Dropdown]

3. You can also refine your search results by using the Filter Results options (green circle above). These filter options include supplier, supplier diversity classification, product category, package size, and manufacturer.

![Filter Results Example]

**Advanced Search**

The advanced search feature allows you to begin narrowing your results by using more precise search criteria initially. You will still have the ability to further refine the search results with the Filter functions.

1. Select “advanced search” from the Shopping home page.

![Advanced Search Example]

2. Enter your search criteria. Be specific when entering criteria. For example:
   - Entering “pipette”, returns 4,000+ results
   - Entering “pipette tip”, returns 2,410 results
Entering “clear pipette tip”, returns 201 results
Entering “clear pipette tip” and “Beckman”, returns 7 results

3. Refine your search results, using the “Filter Results” or “Sort by” options available

Comparison Feature
You may use the Comparison feature to review the search results by lead time, shipping method, manufacturer, image url, part numbers, product size, etc.

1. In the search results, select “compare” next to the items that interest you

2. Then click “Compare Selected”
3. From the comparison screen, you can add items to your shopping cart or return to search results.

Search your order history
You may use the Search Documents to find old orders or check order status.

1. From Orders and Documents, select “Search Documents”

2. From the drop down menu, you may search “all documents or narrow the results by selecting “shopping cart” or “purchase orders”.
3. The screen contains numerous filters to narrow results, such as date range, requestor, supplier, product description or SKU, product flags (recycled, green, energy star, etc.), workflow status, supplier status, and more. You may also sort your search results.

Ordering in e-SHOP

You may use e-SHOP to create a shopping cart using a supplier’s punch-out site or hosted catalog or by submitting a non-catalog order form.

Ordering from a punch-out site

Find the vendor on the e-SHOP home page and click on the vendor’s logo. From the drop down menu, select “PunchOut.”
PROCUREMENT AND PAYMENT SERVICES

1. Select items and add to your shopping cart
2. View cart and edit or update, if needed
3. Follow supplier’s instructions to check-out or submit cart
4. Continue with Completing the Order in e-SHOP below

Ordering from a hosted catalog
A hosted catalog is a listing of suppliers goods in a spreadsheet type format.

1. Select your supplier.
2. A listing of the supplier’s goods will be presented. You may search by keyword (blue circle), filter the results (red circle), or re-order the sort (green circle).

3. Update the quantity and click the “Add to Cart” button (purple circle)
4. When you have finished adding items to your cart, click the active cart button at the top of the page (green circle below) and select View My Cart (green arrow)

5. Continue with Completing the Order in e-SHOP below
Ordering with the non-catalog order form

1. Select the form from the bottom of the shopping home page.

2. Complete the form and select “Add and go to Cart” and click “Go”.

3. Continue with Completing the Order in e-SHOP below

Completing the order in e-SHOP

1. Review the items in your cart
2. Remove items if necessary by selecting the check box (red arrow). Select the appropriate action (red circle), and click “Go”. Please note a few suppliers may require you that you return to punch-out site to modify items.
3. Enter business purpose by clicking “add note”

4. Depending on the e-SHOP user role assigned by your FTC/BSC, you may either Submit or Assign the Cart (green arrow above).
   a. Assigning the Cart
      i. Click Assign Cart
ii. Select “Search for an assignee”

iii. Enter the NetID and click the “Search” button

iv. From the search results, click “[select]”

v. If you will always assign the cart to the same person, click the box next to “Add to Profile.” Otherwise, click the “Assign” button.
vi. You will receive confirmation that your cart was assigned

b. Submitting the cart
   i. After completing steps 1 – 3 above, click “Submit”
   ii. Your shopping cart will be transmitted into a KFS requisition for completion

Completing the KFS Requisition
1. Confirm the delivery address is correct
2. Add the billing account information
If there is only one line item or you are billing line items to multiple accounts, you can click “Show” Accounting Lines (blue arrow above) and enter the information here.

i. Enter the Account Number and Object Code

ii. To search for an object code, click the magnifying glass icon (green arrow above)

1. Enter search criteria using wildcard (*) before and after, hit the “search” button. Or you may just hit the “search” button.

2. Click “return value” to update the KFS requisition with the object code

iii. Click the “add” button (blue arrow below)
b. If there are multiple line items being billed to the same account, you can select “setup distribution”.

   i. Enter the Account Number
   ii. Enter the Object Code
   iii. Click the “add” button
   iv. Click the “distribute to items” button

3. Click the “calculate” button

4. Click the “submit” button

Checking order status
You can check your order status in the Procurement Gateway, KFS, or e-SHOP.

Checking order status – Procurement Gateway
1. Login to the Procurement Gateway at www.gateway.procurement.cornell.edu
2. Scroll down to view “My Orders”
**PROCUREMENT AND PAYMENT SERVICES**

**Checking Order Status – KFS**

1. Login to KFS at [https://kfs-prod.adminapps.cornell.edu/kfs/portal.jsp](https://kfs-prod.adminapps.cornell.edu/kfs/portal.jsp)
2. Click the “doc search” button at the top of the screen

3. Enter search criteria and click the “search” button

4. The search results will include document type (I Want Doc or Requisition), Status, Create Date, and Route Log. Click on the “Route Log” icon for more information.

5. From the Route Log, you can view the order status
Checking Order Status – e-SHOP

1. Login to e-SHOP
2. From Orders and Documents, select “Search Documents”
3. Enter your search criteria. Use the drop down menus to narrow search results. Click “Go” button at bottom of screen.

Search Tips:
Use “Search Shopping Cart” if you are looking for an item that you ordered previously.
Use “Search Purchase Orders” if you want to check the status of an order.
4. View the “Search Shopping Carts” results. You may select the “Cart No.” to view the order details. You may also use this feature to “Copy a shopping cart” to begin a new order.

5. View the “Search Purchase Order” results to check status of your order. Click on the “PO No.”
Click on the “PO Approvals” tab to view your order status.

Ordering from more than one vendor at a time
You may do all of your shopping using multiple vendors and submit only one shopping cart. A KFS requisition will be created for each vendor.

For example, you may order office supplies from W.B. Mason, return your cart to e-SHOP, and save it. Then you may continue shopping and order ink and toner from The Computing Center, return your cart to e-SHOP, and save it.

1. Select vendor, create shopping cart, submit cart and save cart
2. Repeat as needed
3. When you have completed your shopping, enter the business purpose and submit the shopping cart
4. A KFS requisition will be created for each vendor and will be in your Action list. You will see a reminder note at the top of the first KFS requisition after you click submit in e-SHOP.

5. Check the delivery address, add the billing account, click calculate, click submit.

6. Then click the action list button (blue circle above).

7. Click on the “Id” number of the requisition you need to complete (red circle above).

8. Check the delivery address, add the billing account, click calculate, click submit.
Creating Favorite Shopping Lists

You may create personal shopping lists for frequently purchased items or for those items that you purchase once or twice a year. This tool allows you the flexibility to organize your shopping lists.

1. Create a shopping cart or copy from a previous cart
2. Select the items that you’d like to save in a shopping list by clicking the checkbox to the right of the price. Then select “Add to Favorites” and click “Go”.

3. You may edit the description or add a note or reminder

4. Select an existing shopping list and Save changes or Create a new list
5. To create a new list, click “Add New”

6. Name your shopping list and “Save Changes”

Viewing your Favorite Shopping List

1. From the shopping home page, select “favorites”
2. Click on the list that you want to view. Use the checkbox to select an item (red circle) and then use the drop down menu to add the item to your shopping cart (purple circle).
KFS Tips

Setting default delivery address

1. In the KFS requisition Delivery tab, you will see the following:

   ![Delivery Tab Image](image)

2. To change a building, click the button to the right of the Building listed (green circle).

3. In the Building Lookup screen, the campus will default to “IT” for Ithaca. Use wildcards (*) when searching, i.e. *east hill*. Click the “search” button.

4. Click “return value” next to the building needed.

   ![Building Lookup Table](image)

5. You may enter the room number manually or click the button to look it up.

   ![Room Entry](image)
6. Click the “set as default building” button to make the address your default (red circle below).

7. The “Delivery To” field defaults to the person creating the KFS requisition and may be changed.

Creating frequently used (favorite) account list
You may email e-SHOP@cornell.edu with your NetID, account number, object code (optional) and we will create the default account list for you. Or you may follow the steps below to create it yourself.

1. From the KFS Main Menu, type “User Favorite” in the search box

2. Initially, you will need to setup your profile. Click the “create new” button in the top right corner (blue circle). If you have already created a profile, you can look up your existing favorites by entering your NetID in the “User Principal Name” field (green circle).
3. To create your favorite account, you will need to enter data in the following fields:
   a. Document Overview (blue circle below)
      i. Description: Creating account favorites (required)
   b. New Favorite Account – Optional (red circle below)
      i. Account Nickname
      ii. Account Number
      iii. Object Code - You may enter multiple favorites using the same account but different object codes, such as, Professor Jones’ travel, Professor Jones’ office supplies, Research project ABC.
      iv. Primary - Only one account can be designated as primary. KFS will automatically populate all account lines with this account number. It is not necessary to select a primary account.
   c. Click the “add” button (green arrow below)
4. You may continue to add accounts by repeating the steps above. Once you are finished, click the “submit” button.

![Submit, Save, Close, Cancel buttons]

5. You should receive the following message at the top of the page

```
Document was successfully submitted.
```

6. Click “close” button at the bottom of the screen

![Submit, Save, Close, Cancel buttons]

Now when you complete a requisition in KFS, you will see a Favorite Accounts drop-down menu. The drop-down listing will display the nickname, account number, and object code information that you provided.

![Favorite Accounts drop-down menu]

**Updating your phone number**

To correct your phone number in the KFS requisition, you must enter your phone number in Workday.

1. Login to Workday at [www.workday.cornell.edu](http://www.workday.cornell.edu)
2. Select “Personal Information”
3. Select “Contact Information”

4. Select Edit

5. Scroll down to the Work Contact Information
6. Select the pencil icon to edit

7. Enter the area code and phone number

8. This will update in KFS the next business day
Training Resources
For additional training material, including tutorials and brief webinars (2 – 5 minutes), please visit the Procurement and Payment Services website at https://www.dfa.cornell.edu/procurement/e-shop/training.

The e-SHOP FAQs may be found at https://www.dfa.cornell.edu/procurement/e-shop/faq.

Procurement Services Contact Information

Procurement and Payment Services
395 Pine Tree Road, Suite 330
Ithaca, NY 14850

Telephone: (607) 255-3804
Help Line: (607) 254-5300
Email: procurement@cornell.edu or e-SHOP@cornell.edu