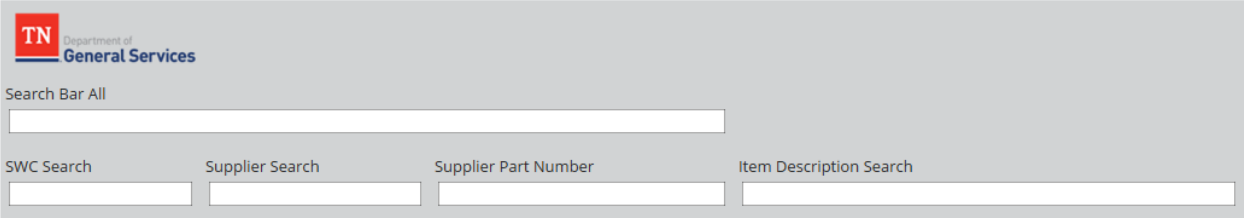
Instructions for Using TN SmartShop

Purpose

The purpose of this job aid is to present the basic instructions to utilize the Tableau Dashboard to search items on all Statewide Contracts and create an exportable "shopping cart." This is available for Local Authorized Users of Statewide Contracts as well as State users.

Using the Item Lookup

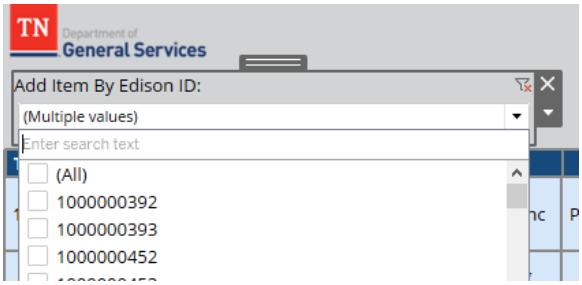
- Use the search bars along the top to find information on items you are looking for.



  - "Search Bar All" will search for your input within all searchable fields (SWC, SWC Description, Supplier, Supplier Part Number, and Item Description)
  - The next four search bars will search within each specific field. "SWC Search" will search within both SWC# and SWC Description.
- **Mobile-** Once you have entered your search terms, use the "Show Results" button to see your search results. Click the button again to hide them and go back to the search bars.

Using the Shopping Cart

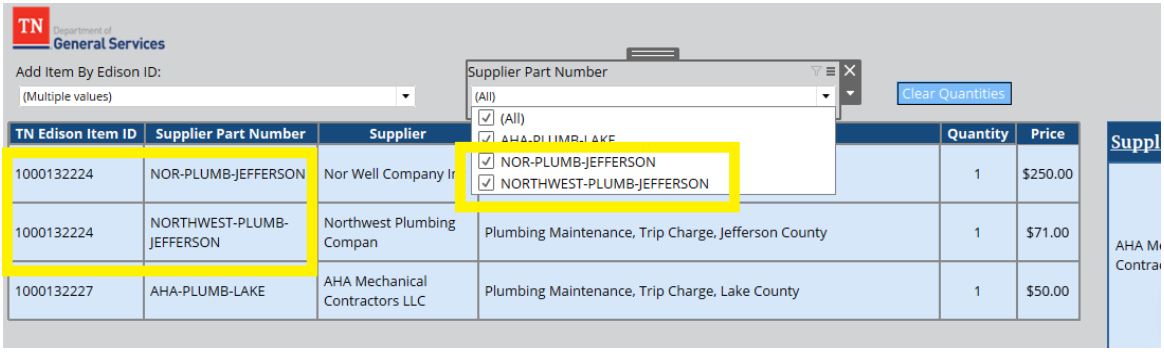
- As items are found in the Item Lookup tab, they can be added to the Shopping Cart on the next tab using the Edison ID.
  - Use "Add item by Edison ID" to search for each item and click/ add ✔ to add that item to your "shopping cart" list.



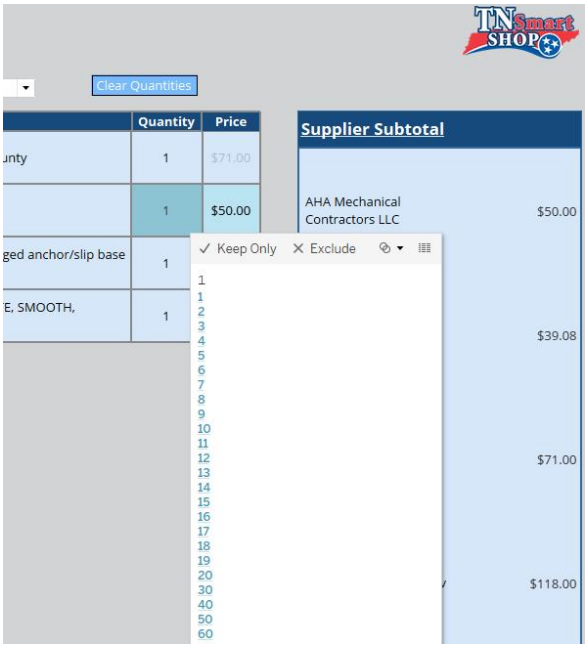
  - Continue until all desired items are added.

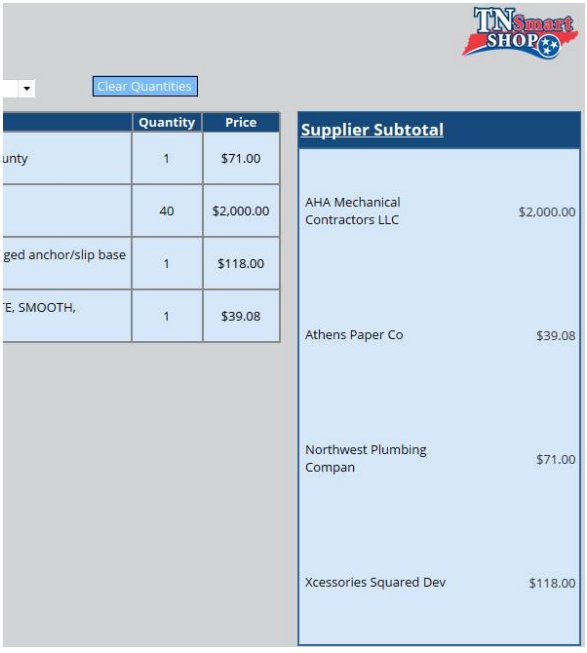
*If you are using the mobile layout, you can find the resulting cart list by clicking the "Show Cart" button. Clicking again will hide it to return to the filters.

- If you add an Edison Item ID which includes multiple items, you can remove any unwanted item(s) with that ID via their individual supplier part number with the "Supplier Part Number" filter



- If you want to change the quantities of items to see your actual sub-total based on the amount you would order of each item, click on the item in the chart and select the preferred quantity from the list that appears. (Quantity options include 1-20, then 30-100 by tens, then 200-1000 by hundreds)



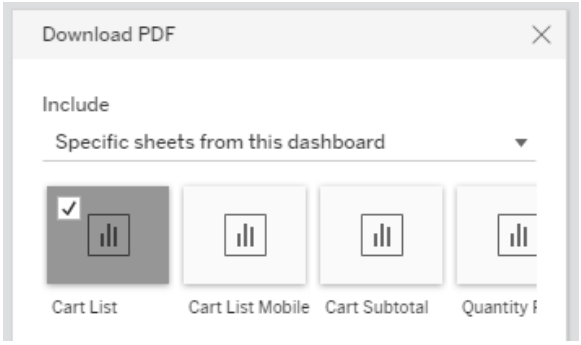


- If you need to change all the quantities back to 1 or if it is not working correctly, reset them all by clicking on the "Clear Quantities" button just above the list. After clicked

once, wait one second and the button should slightly change color. Click the button again and the quantities should all reset to 1.

- On the right, the subtotal of the cart list is shown broken down by the total for each supplier. An overall total of all the items is then shown at the bottom. These totals all account for the quantity of each item as well. *This can be shown/hidden on mobile via the “Show/Hide Totals” button.

- Once all the desired items are entered and have the desired quantities, the cart list can be saved as a PDF/ printed by clicking the blue “PDF” button next to the cart total, or under the Cart list for the mobile layout.
    - Under “Include” choose “Specific sheets from this dashboard” and then choose the sheet named “Cart List” and click “Download”.



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