Sole Source

Sole Source purchases can be created via the Form Sole Source as well as the Non-Catalog Item method. It is important to understand both processes prior to creating a cart.

Form Method:

This can be a very helpful and focused pathway but it also has its limitations.

A sicker on the Shopping Dashboard has been created specifically for the sole source process.

Showcases				
Non-Catalog Purchase Types				
Sole Source (Over \$10K)				

Locate the Sole Source sticker and click on it.

The pop-out screen appears similar to the Sole Source form.

Enter or Search for the supplier

Review the Distribution Method information – update if needed

Complete each section

Once complete, at the top of the page the following options are available

Available Actions:	Add and go to Cart	Ν	Go	Close	
	Add to Cart and Return	h			
	Add to Cart				
	Add to Draft Cart or Pending PR/PO				
	Add to Favorites				
	Add to new Cart				

- Add and go to Cart IF you do not already have an Active cart otherwise this function will combine the two carts
- Add to new Cart this will create a new Active cart

Locate cart: Shop – My Carts and Order – View Carts

Select correct cart

Shopping Cart - 2020-04-21 ckeck 01					÷ 0
Simple Advanced Search for products, suppliers, forms, part number, etc.			٩	Estimate (1.08 USD) Subtotal Sales Tax	× 1.00 0.08
1 item 545 Doughnuts Inc -		ACTIONS FOR 0 SELECTED ITEMS -		Tax2 Shipping Handling	0.00
1 product description line Commodity Code 578	not required but helpful 1.00	Qty: 1 1.00		PROCEED TO CHECKOUT ASSIGN CART	1.08

If updates need to be made to the form, click on the Product Description Line

The sole source form will appear

Update as needed

Once complete, SAVE the form at the top of the page

Available Actions:	Save	Ν	~	Go	Close	
		A5				

Update cart name

Proceed to Checkout to update cart following normal procedures

** Important differences when using a form sticker:

The Product Description field is 254 characters long

This field populates the product line information on the Cart / Requisition / PO

Only contains a Quantity of 1

May produce a \$0.00 line item amount - this will create an error

Some information on the form may need to be duplicated on the cart

Form and HISTORY section will need to be saved as separate PDF's if needed outside of the ePro platform

Non-Catalog Item Method:

Create a cart using the Non-Catalog Item process. Complete the Sole Source form, located on the university's forms page Add it in the Internal Notes & Attachment section on ePro Proceed as normal