

How to Place Free Description Material Orders



Sourcing & Procurement

Free Description Material Orders



'With Free Description' shopping carts are used for ordering products that are not available on Terrier Marketplace.

The screenshot shows the BUworks Procurement interface. The 'Procurement' tab is highlighted in the top navigation bar. In the left sidebar, 'Place and Manage Orders' and 'Shopping Cart' are highlighted. In the main content area, 'Shopping Cart' is highlighted under the 'Active Queries' section. Three yellow callout boxes with arrows point to these elements: 'Step 1. Click Procurement' points to the Procurement tab, 'Step 2. Click Place and Manage Orders' points to the Place and Manage Orders link, and 'Step 3. Click Shopping Cart' points to the Shopping Cart link.

- ❖ Click 'Procurement' tab in BUworks*
- ❖ Click 'Place and Manage Orders'
- ❖ Click 'Shopping Cart'‡

*Individuals must have the designated 'Shopper' role in BUworks to place shopping cart orders.

‡Clicking Shopping Cart will open a cart in a new window.

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Quotes from the supplier should be on hand at the time of placing the order.

The screenshot shows the 'Create Shopping Cart' interface. At the top, there are buttons for 'Order', 'Print Preview', 'Close', 'Save', 'Check', and 'Park'. Below this, the document number is 1000752310, the document name is BUWTN503 04/05/2018 08:33, and the status is 'In Pro'. The 'General Data' section includes a 'Buy on Behalf of' field with the value 77616, a 'Name of shopping cart' field with the value BUWTN503 04/05/2018 08:33, and a 'Default Settings' field with a 'Set Values' link. Below this is a 'Team Shopping Cart' checkbox and an 'Approval Process' link. The 'Item Overview' section shows a table with columns for 'Line', 'Link Item', and 'Amount'. The first row is highlighted, showing 'With Free Description' in the 'Link Item' column and '14100000' in the 'Amount' column. Annotations include: 'Step 4. Set Default Settings*' pointing to the 'Set Values' link; 'Step 5. Click Add Item' pointing to the 'Add Item' button; and 'Step 6. Select With Free Description' pointing to the 'With Free Description' link item.

- ❖ Click 'Set Values' to set Single-Cart Default Values*
- ❖ Click 'Add item'
- ❖ Select 'With Free Description' to generate a pop-up window

*If required or applicable, set default delivery address and account assignment before adding an item to the shopping cart. See 'Single-Cart Default Settings' for instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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The number of line items added to the shopping cart must reflect the number of line items in the supplier's quote; standard shipping charges should not be included in the shopping cart.

Step 7. Enter Product Information

Product Type: Material

Description: * How to Create a Free Description Cart

Internal Note: If you know the supplier is not registered, enter the supplier name and contact information (including email) in this box.

Product Category: 14100000 SUPPLIES-OFFICE

Quantity / Unit: 1.000 EA

Net Price / Currency: 10.00 USD

Delivery Date: 07/20/2017

Add to Item Overview Cancel

Step 8. Click Add item to Overview

- ❖ Enter the following product information:
 - Description & Internal Note
 - Product Category*
 - Quantity
 - Unit: EA = Each
 - Net Price: Price for 1 unit
 - Delivery date
- ❖ Click 'Add Item to Overview' to add item to the cart

* General Ledger (G/L) codes are automatically assigned based on Product Category.

See 'How to Assign Product Category' for instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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The number of line items added to the shopping cart must reflect the number of line items in the supplier's quote; standard shipping charges should not be included in the shopping cart.

Create Shopping Cart

Order | Print Preview | Close | Save | Check | Park

Number: 1000592204 | Document Name: BUWWTN503 07/14/2017 14:21 | Status: In Process | Created On: 07/14/2017 14:21:30 | Created By: THOMAS SYMANYK

General Data

Buy on Behalf of: 88803 THOMAS SYMANYK | Header Approval Note: []

Name of shopping cart: BUWWTN503 07/14/2017 14:21

Default Settings: [Set Values](#)

Header Data: [Values](#)

Team Shopping Cart: Make available to my purchasing substitutes

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

Line Number	Item Type	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency
0001	Material	14100000	SUPPLIES-OFFICE	1	EA	10.00	USD

Step 9. Click Details

Details for item 1 How to Create a With Free Description

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval

Identification

Item Type: Material | Product ID: [] | Description: How to Create a With Free Description | Product Category: 14100000 SUPPLIES-OFFICE | Order as Direct Material:

Organization

Purchasing Group: Purchasing Group 117 | Show Members | Company Code: TRBU Trustees of Boston Univ

Further Properties

Supplier Product Number: []

Currency, Values and Pricing

Order Quantity / Unit: 1 EA each | Ordered Quantity / Unit: 0.000 | Open Quantity / Unit: 0.000 | Price / Currency: 10.00 USD | Price Unit: 1

Not to Exceed Price: | Not Separately Priced: | Incremental Funding Active: | Goods Receipt: | Invoice Receipt: | Goods Receipt Non-Valuated:

Tax / Amount: 0.00 USD

- ❖ Click 'Add Item to Overview' to add item to the cart
- ❖ Click 'Details'*
- ❖ Scroll to the bottom of the page to review item detail tabs

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The number of line items added to the shopping cart must reflect the number of line items in the supplier's quote; standard shipping charges should not be included in the shopping cart.

Step 10. Review Item Data

Number 44 Document Name BUWTN503 04/17/2018 12:49 Status In Process Created On 04/17/2018 12:49:04 Created By THOMAS SYMAN

Item Data Account Assignment Notes and Attachments Delivery Address/Performance Location Sources of Supply / Service Agents

Identification
Item Type:
Product ID:

Currency, Values and Pricing
Order Quantity / Unit: EA each
Ordered Quantity / Unit:
Open Quantity / Unit:
Price / Currency: USD Price Unit

Not to Exceed Price:
Not Separately Priced:
Incremental Funding Active:
Goods Receipt:
Invoice Receipt:
Goods Receipt Non-Valuated:
Tax / Amount: 0.00 USD
Service Master Record: [Display](#)

Service and Delivery
Incoterms Key/ Location:

Organization
Purchasing Group: [Show Members](#)
Company Code: Trustees of Boston Univ

Further Properties
Supplier Product Number:
Period of Performance:
Option Type:

Step 11. Click Account Assignment

❖ Review the following information in the 'Item Data' tab:

- Description & Internal Note
- Product Category*
- Quantity
- Unit: EA = Each
- Net Price: Price for 1 unit
- Delivery date

❖ Click 'Account Assignment' Tab

* See 'How to Assign Product Category' for instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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Account Assignment Category depends on the assignment number used to pay for the line item.

Create Shopping Cart

Order | Print Preview | Close | Save | Check | Park

No source of supply found for item

Number 1000752344 Document Name BUWTN503 04/17/2018 12:49 Status In Process Created On 04/17/2018 12:49:04 Created By THOMAS SYMANC

Details for item 1 Limit Item

Item Data | **Account Assignment** | Notes and Attachments | Delivery Address/Performance

You can see who bears the costs and, if necessary, you can assign costs to different cost centres

Asset	Cost Center	Order	WBS element	Assign Number	Acc
				1202020000	BIOL

Step 12. Select Account Assignment Category

Step 13. Enter Assignment Number

- ❖ Click 'Account Assignment Category' dropdown:
 - Select one of the following:
 - Asset
 - Cost Center: 1XXXXXXXX
 - Order: 9XXXXXXXX
 - WBS Element

- ❖ Enter cost or internal order/fund number to be charged for this purchase*

*To split the cost of a line item between two separate accounts see 'Split Product Costs' instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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Free Description shopping carts should always have documentation attached.
Orders over \$5,000 require documentation be attached to submit the order.

Step 14. Click Notes and Attachments

Step 15. Add notes

Step 16. Add Attachments*

- ❖ Click 'Notes and Attachments' tab
- ❖ Click 'Internal Note' or 'Supplier Text' blue link to add notes to the supplier or buyer
- ❖ Click 'Add Attachment' to attach documents including, but not limited to:
 - ❖ Quotes
 - ❖ Proposals
 - ❖ Price lists
 - ❖ Proof of Competitive Bid

*See 'Adding Attachments' for instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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Suppliers assigned at line item level*.

If the supplier number not available, submit shopping carts without the supplier assigned and provide supplier information in the notes of the shopping cart.

The screenshot shows the SAP 'Item Overview' and 'Sources of Supply / Service Agents' tabs. The 'Sources of Supply' tab is active, showing a table with columns: Supplier Number, Supplier Name, Contract, Item, and Contract Item Description. The table is currently empty. Below the table, there is a 'Supplier:' field with a text input box and a search icon. A keyboard image highlights the 'Enter' key.

Step 17. Click Sources of Supply

Step 18. Enter Supplier Number

Step 19. Hit Enter

- ❖ Click 'Sources of Supply / Service Agents' tab to assign the supplier
- ❖ Enter supplier number or search for the supplier ±
- ❖ Hit 'Enter' on keyboard to assign the supplier
- ❖ Repeat steps 5-19 to add each product to the shopping cart as a line item

* Significant line item changes may result in un-assigning an assigned supplier.

± See 'Search and Assign Supplier' for instructions (<http://www-staging.bu.edu/sourcing/how-to-place-orders/>).

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Suppliers assigned at line item level, and should be the last action before placing the order.

Step 22. Click Order

Step 20. Click Check

Step 21. Check for Errors

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity
0001	Material		How to Create a With Free Description	14100000	SUPPLIES-OFFICE	1

- ❖ Click 'Check' to review the shopping cart for errors
- ❖ Review errors and make changes as needed*
- ❖ Click 'Order'



*Red icons indicate errors must be corrected before clicking Order



Yellow Icons are notifications that do not require action to click Order



Sourcing & Procurement Additional Resources

Ordering Information
Sourcing & Procurement:

Website: www.bu.edu/sourcing
Email: sourcing@bu.edu

Invoice Payment Information
Accounts Payable:

Website: www.bu.edu/ap/resources
Email: invoices@bu.edu