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.

Step 2. Click **Place and Manage Orders**

Step 1. Click **Procurement**

Step 3. Click **Shopping Cart**

❖ 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.

Free Description Material Orders

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

Create Shopping Cart

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

Number 1000752310   **Document Name** BUWTN503 04/05/2018 08:33   **Status** In Pro

▼ General Data

Buy on Behalf of: 77616   Head

Name of shopping cart: BUWTN503 04/05/2018 08:33

Default Settings: Set Values   **Step 4. Set Default Settings***

Header Data: Values

Team Shopping Cart: ☐ Make available to my purchasing substitutes

Approval Process: Display / Edit Agents

Step 5. Click Add Item

▼ Item Overview

Details | Add Item ▲ | Copy | Paste | Duplicate | Delete

With Free Description   **Step 6. Select With Free Description**

Limit Item

Old Shopping Carts and Templates   14100000

Terrier Marketplace   14100000

❖ 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 <u>before</u> 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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Free Description Material Orders

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

Add Item with Fre...

Field	Value
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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Free Description Material Orders

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.

- ❖ 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

*The line item must be highlighted (appears yellow) to click the Details button.

Free Description Material Orders

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

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.

❖ Click 'Account Assignment Category' dropdown:
   Select one of the following:
   ○ Asset
   ○ Cost Center: **1**xxxxxxx
   ○ Order: **9**xxxxxxx
   ○ 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/).

Free Description Material Orders

Free Description shopping carts should always have documentation attached.

Orders over $5,000 require documentation be attached to submit the order.

- ❖ 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/).

Free Description Material Orders

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.

- ❖ 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/).

Free Description Material Orders

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

Create Shopping Cart

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

🛑 Line 1: Enter a start date that precedes the end date

⚠️ Funds Management error; Annual budget exceeded by 7.292,33 USD (FM PB Availability Control) for document item 00001

Number 1000592136   Document N...   ...N503 07/07/2017 13:19   Status In Process   Created On 07/07/2017 13:19:19   Create

▼ General Data

Buy on Behalf of: | ...CYK   Header Approval Note:
Name of shopping cart: |
Default Settings:
Header Data: Values

▼ Item Overview

Details | Add Item ▴ | Copy | Paste | Duplicate | Delete

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
•	Undefined Item Type			14100000	SUPPLIES-OFFICE	1.000

Details for item 1 How to Create a With Free Description

❖ Click 'Check' to review the shopping cart for errors

❖ Review errors and make changes as needed*

❖ Click 'Order'

🛑 *Red icons indicate errors <u>must</u> be corrected before clicking Order

⚠️ Yellow Icons are notifications that <u>do not require action</u> 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