How to Personalize Default Settings for All-Carts

Sourcing & Procurement
Personalize All-Cart Default Settings

Personalization Settings allow you to set the Delivery Address, Account Assignment, Internal Notes, and Product Categories for all shopping carts.*

Step 1. Click Procurement Tab

Step 2. Click Personalization

*Personalization defaults must be set BEFORE shopping carts are created.
Personalize All-Cart Default Settings

Default settings must be set BEFORE shopping carts are created.

※ Click ‘Edit’ to open Personalization for editing box *

※ Delivery Address: Email, %, Phone Number, Room/Floor Numbers cannot be set at the Personalization All-Cart Level ✗

※ Cost Center: Internal Orders cannot be set at the Personalization All-Cart Level ✗

* The Edit button will need to be selected each time an attribute is revised.

※ To set defaults for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Personalize All-Cart Default Settings

All-Cart Default settings must be set BEFORE shopping carts are created.

- Scroll to bottom of the page to the ‘Attribute’ drop-down
- Click ‘Attribute drop-down and select setting options
- Cost Center
- Delivery Address *
- Product Category

**Step 4.** Scroll down

**Step 5.** Click **Attribute** drop-down

**Step 6.** Select attribute

- Only Cost Centers can be assigned as defaults at the All-Cart Level. To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).

- Email, C/O, Phone, Email, Room/Floor Numbers of a Delivery Address cannot be set at the All-Cart default level. To set these attributes for an order, please see ‘Single-Order Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Only Cost Centers can be assigned as defaults at the All-Cart Level. Internal Order numbers can be set as defaults for single orders.

- Click the ‘Attribute drop-down and select Cost Center’
- Click the ‘Logistical System’ drop-down and select the option with the asterisk(*) at the end

To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Personalize Cost Center Settings

All-Cart Default settings apply to ALL shopping carts created after the settings have been saved.

- Click grey box to highlight line
  * If no line: Click ‘Add Line’
  * If unable to edit line: Click ‘Remove’ and ‘Add Line’

- Select ‘Standard’ radio button

- Type Default Cost Center in the Value Box

- Only Cost Centers can be assigned as defaults at the All-Cart Level. To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Personalize Cost Center Settings

After clicking the ‘Save’ button, the ‘Edit’ button will need to be clicked to re-open Personalization for additional settings.

- Click ‘Save’ to save the Cost Center
- Check ‘Value Description’ to confirm Cost Center has been saved and populated in the field

Only Cost Centers can be assigned as defaults at the All-Cart Level. To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
All-Cart Default settings must be set BEFORE shopping carts are created.

- Click ‘Edit’ to open Personalization for editing box*
- Email, %, Phone Number, Room/Floor Numbers cannot be set at the Personalization All-Cart Level

*Email, C/O, Phone, Email, Room/Floor Numbers of a Delivery Address cannot be set at the All-Cart default level. To set these attributes for an order, please see ‘Single-Order Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Personalize Delivery Settings

All-Cart Default settings must be set BEFORE shopping carts are created.

- Scroll to bottom of the page to the ‘Attribute’ drop-down
- Click ‘Attribute drop-down and select setting options
  - Cost Center
  - Delivery Address *
  - Product Category

- Only Cost Centers can be assigned as defaults at the All-Cart Level. To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).

- Email, C/O, Phone, Email, Room/Floor Numbers of a Delivery Address cannot be set at the All-Cart default level. To set these attributes for an order, please see ‘Single-Order Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
All-Cart Default settings apply to ALL shopping carts created after the settings have been selected.

- Click the ‘Attribute’ drop-down and select **Delivery Address**

- Download the Delivery Address Values list, to find available delivery addresses
  - Download from [www.bu.edu/sourcing](http://www.bu.edu/sourcing)

**Step 18.** Select **Delivery Address**

**Step 19.** Download **Delivery Address Values List**
Personalize Delivery Settings

Delivery Address email, %, phone number, room/floor numbers cannot be set at the Personalization All-Cart Level.

- Click grey box to highlight line
  * If no line: Click ‘Add Line’
  * If unable to edit line: Click ‘Remove’ and ‘Add Line’
- Select ‘Standard’ radio button
- Type Default Delivery Address Value in the Value Box

- Delivery Address Values can be found on the Delivery Address Values list on www.bu.edu/sourcing if the desired delivery address is not found on this list, it is not an available delivery option for orders.

- Email, C/O, Phone, Email, Room/Floor Numbers of a Delivery Address cannot be set at the All-Cart default level. To set these attributes for an order, please see ‘Single-Order Default Settings’ instructions (bu.edu/sourcing/how-to-place-orders/).
Personalize Delivery Settings

All-Cart Default settings apply to ALL shopping carts created after the settings have been selected.

- Click ‘Save’ to save the Delivery Address
- Check ‘Value Description’ to confirm that Delivery Address has saved and populated in the field

‡ Delivery Address Values can be found on the Delivery Address Values list on www.bu.edu/sourcing if the desired delivery address is not found on this list, it is not an available delivery option for orders.
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