

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.*

The screenshot shows the Boston University Procurement system interface. At the top left is the Boston University logo. Below it is a navigation bar with tabs: Manager Self-Service, Payroll Coordinator, Organizational Chart, Finance, ACCT XWalk, Reporting, Procurement, and Worklist. The Procurement tab is highlighted with an orange box and labeled "Step 1. Click Procurement Tab". Below the navigation bar is a left sidebar with menu items: Overview, Personalization, Work Overview, Place and Manage Orders, Services, Help (P2P Guide), and Advanced Search. The Personalization menu item is highlighted with an orange box and labeled "Step 2. Click Personalization". The main content area shows "Active Queries" with links for Shopping Carts: All (1), Saved (0), Awaiting Approval (0), Team Carts (3), and Public Templates (0). Below this is a section for "Shopping Carts - All" with a dropdown menu for "Hide Quick Criteria Maintenance". At the bottom, there is a search field for "Shopping Cart Number" with a value of 1000752034 and a "To" field.

*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.

BOSTON UNIVERSITY

Manager Self-Service | Payroll Coordinator | Organizational Chart | **Procurement**

Overview | **Personalization** | Terrier Temps | Internal Service Request

Display Defaults

Edit ← **Step 3. Click Edit**

Employee ID: [] Name: []

Personal Data

Form of Address: [] Academic Title: []

First Name: [] Last Name: []

Position | User Account

Organizational Assignment | Department Address

Department: [Biology] | Position: [MGR PURCHAS] | Floor/ Room: []

Functional Assignment | Information

Department Head Of: [Biologv] | View All | Communicate

- ❖ 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.

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

Step 4. Scroll down

Step 6. Select attribute

- ❖ 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/).

Personalize Cost Center Settings



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

Attributes for Position MANAGER, PURCHASING/FACILITIES

Attribute: Cost Center*	Logical System: QERCLNT500*	Add Line	Remove
	PSUCLNT500		
	QERCLNT500*		Changeable
	1202020000		<input checked="" type="checkbox"/>

Step 7. Select Cost Center

Step 8. Select Asterisks* Logical System

❖ 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..

The screenshot shows a web interface for configuring cost centers. At the top, there's a header 'SING/FACILITIES' and a dropdown menu for 'Logical System' set to 'QERCLNT500*'. Below this are two buttons: 'Add Line' and 'Remove'. A table below contains the following data:

Standard	Deactivate	Value Description	Value
<input type="radio"/>	<input type="checkbox"/>	1202020000	1202020000

Callout boxes indicate the following steps:

- Step 9. Highlight Line**: Points to the first row of the table.
- Step 10* Click Options (If needed)**: Points to the 'Add Line' and 'Remove' buttons.
- Step 10. Select Standard**: Points to the 'Standard' radio button in the first row.
- Step 11. Type Default Cost Center**: Points to the 'Value' field in the first row.

- ❖ 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.

The screenshot shows the 'Personalization' tab in a web application. The 'Save' button is highlighted with a red box and labeled 'Step 12. Click Save'. Below it, the 'Value Description' field is highlighted with a red box and labeled 'Step 13. Confirm Data Saved'. The table below shows the 'Value Description' field populated with '1202020000'.

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>	1202020000	1202020000

- ❖ 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/).

Personalize Delivery Settings



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

BOSTON UNIVERSITY

Manager Self-Service | Payroll Coordinator | Organizational Ch | **Procurement**

Overview | **Personalization** | Terrier Temps | Internal Service Request

Edit ← Step 14. Click Edit

Employee ID | Name

▼ Personal Data

Form of Address: Academic Title:

First Name: Last Name:

Position | User Account

Organizational Assignment Department

Department: Position: Floor/ R

Functional Assignment

Department Head Of: [View All](#)

❖ 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.

Overview Personalization TerrierTemps Internal Service Request

Edit Document:
Save Read Only Check Close

Employee ID 77616 Name 1

▼ Personal Data
Form of Address: Academic Title:
First Name: Last Name:

Position User Account

Department Address Details
Attachment
Department: Cost Center*
Street: Delivery address*
Flag: Forward Work Item*
Product Category*
Attribute: Request
WBS Element
Attribute:

Functional Assignment
Department Head Of: View All
00000000 ;

Communication type:
Phone Number/ Extension:
Fax Number / Extension:
E-Mail:

SING/FACILITIES

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

Step 4. Scroll down

Step 6. Select attribute

- ❖ 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/).

Personalize Delivery Settings



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

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

Step 18. Select **Delivery Address**

Edit Document:

Save | Read Only | Check | Close

Attributes for Position: MANAGER, PURCHASING/FACILITIES

Attribute: Add Line Remove Display Default

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>	BU / Boston / 00000 / NOT VALID	0000176353

Personalize Delivery Settings



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

Edit Document:
Save | Read Only | Check | Close

Employee ID | Name | Country: US

CHASING/FACILITIES

tribute: Delivery address*

Add Line | Remove | Display Default

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>		

Step 20. Highlight Line

Step 21* Click Options (If needed)

Step 21. Select Standard

Step 22. Type Delivery Address Value ♦

- ❖ 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.

Overview Personalization TerrierTemps Internal Service Request

Edit Document

Save

Step 23. Click Save

Employee ID Name

Country: US

Attributes for Position MANAGER, PURCHASING/FAC

Attribute: Delivery address* Remove Display Default

Standard	Deactivate	Value Description	Value
<input checked="" type="radio"/>	<input type="checkbox"/>	BU / Boston / 02215 / 705 COMMONWEALTH AVE	0012404804

Final Step. Confirm Data Saved

- ❖ 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