How to Use Team Purchasing Settings

Sourcing & Procurement
Team Purchasing allows multiple users on a team to view and take action on each other’s shopping carts*.

Each individual participating on the team will need to complete the following steps:

- Click ‘Procurement’ Tab
- Click ‘Personalization’

*Once Team Members complete Team Purchasing Settings, every member will need to complete an additional step on the shopping cart level when creating team shopping carts in the future.
Each individual participating on the team will need to complete the following steps.

- Click ‘Personalization’
- Click ‘Edit’ to open Personalization for editing*
- Select ‘User Account’ tab and scroll down to the bottom of the page

*The Edit button will need to be selected each time a revised attribute is saved.
Each individual participating on the team will need to complete the following steps.

- Click ‘Add Line’ to add an individual to your purchasing team
- In blank line under ‘Name of Substitute’, click search window
Each individual participating on the team will need to complete the following steps.

- Enter team member name in corresponding search box using *asterisks*
- Click ‘Search’
- Select desired team member in search results
Each individual participating on the team will need to complete the following steps.

- Select start and end date of the team purchasing settings*
- Repeat steps 5 – 11 to add every individual to the purchasing team

* If there is no specified end date, you can enter the following date for an end date: 12/31/9999
Each individual participating on the team will need to complete the following steps.

- Repeat these steps 5 – 11 to add every individual to the purchasing team.
- Click ‘Save’
- Once Team Settings have been saved, Team Members will need to complete an additional step when creating Team Shopping carts*

* See next slide for required step when creating Team Shopping carts.
Creating a Team Cart

The Team Shopping Cart setting must be selected during shopping cart creation for the shopping cart to be visible to team members.

- Create a shopping cart in BUworks
- Check Team Shopping Cart box to make the shopping cart visible to team members*

‡Teams must be created in Personalization to have Team Shopping cart option in shopping carts.

*Selecting ‘Team Shopping Cart’ box only gives team members viewing access to the cart. This will not allow Team Members to make changes or take over the shopping cart.

For information about editing team member shopping carts see ‘Take Over Team Shopping Carts’ (bu.edu/sourcing/how-to-place-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