Personalization (Default Shopping Cart Settings)

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

*Personalization defaults must be set BEFORE shopping carts are created.
Personalization (Default Shopping Cart 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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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/).
  - https://www.bu.edu/sourcing/h2po/#singlecartdefaults
- 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-Cart Default Settings’ instructions (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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

To set an Internal Order number as the default for a single order, see ‘Single-Cart Default Settings’ instructions (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
Personalize Cost Center Settings

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

- Step 9. Highlight Line
- Step 10* Click Options (If needed)
- Step 11. Type Default Cost Center

- 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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
Personalize Delivery Settings

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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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

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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).

✶ 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-Single Cart Default Settings’ instructions (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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](http://www.bu.edu/sourcing)

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**Step 18. Select Delivery Address**

**Step 19. Download Delivery Address Values List**
Delivery Address email, %, phone number, room/floor numbers cannot be set at the Personalization All-Cart Level ✦

✧ 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 (https://www.bu.edu/sourcing/h2po/#singlecartdefaults).
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](http://www.bu.edu/sourcing)
Email: sourcing@bu.edu

Invoice Payment Information
Accounts Payable:

Website: [www.bu.edu/ap/resources](http://www.bu.edu/ap/resources)
Email: invoices@bu.edu