

Checkout Process



Checkout Process

Start by reviewing header information. Header information will populate based on Personal Profile*, and applies to all items in the PR. Set the **Ship To** and **Deliver To** at the header level when shipping to one address. If you are purchasing from a catalog supplier (e.g., WB Mason), set the **Ship to** and **Deliver To** at the header level. If you need to send the order to multiple addresses, create separate PRs for each address.

- 1 Click **Manage Locations** to update the **Ship to** information.
- 2 Enter a **Need By Date***.
- 3 Update **Deliver To** if necessary. (e.g., JDoe Floor 1 #120).
- 4 Update **Requestor** if necessary.

The screenshot shows the 'Guided Buying' interface. At the top, there is a search bar with the text 'Please provide a title*' and a red arrow pointing to it with the text 'Click to title PR'. Below this are 'Submit' and 'Save and exit' buttons. The main content area is divided into 'Header Level' and 'Line Level' sections.

Header Level:

- 1:** A red box highlights the 'Ship to' field (1 Raleigh Street, Boston, MA 02215, United States) and the 'Manage locations' link. A red arrow points to the 'Manage locations' link with the text 'Click to title PR'.
- 2:** A red box highlights the 'Need-by Date' field, which is currently empty. A red arrow points to it with the text 'Need By Date must be set'.
- 3:** A red box highlights the 'Deliver To' field (JDoe, Floor 1 #120).
- 4:** A red box highlights the 'Requestor' field (JILL BROWN).

Line Level:

- A red box highlights a warning message: 'This item contains missing or incorrect information.'
- Below the warning is a table with one item:

Quantity	Price	Net Amount
2 box	\$26.67 USD	\$53.34 USD

Note:

- Errors noted in red are required fields and must be addressed to submit the PR.
- *Personal Profile: Ship to, Charge to, Deliver to, and Requestor flow from Personal Profile. If you are shopping on behalf of someone, settings will flow from their Personal Profile.
- Need By Date: We recommend 5 days. This is a system requirement, but does not bind a supplier to that date.
- Click the tool tip icon to learn what needs to be entered in that field.



Checkout Process

Review line level detail. Tabs include Accounting, Shipping, Comments, Attachments and Others.

The screenshot displays a checkout interface with the following elements:

- Items (1)**: A table with columns for Quantity, Price, and Net Amount.
- Line Item**: "Breakfast Blend Coffee K-Cup Pods, 24/BX" (0010000800 (WB Mason Company)) with a quantity of 2 box, price of \$26.67 USD, and net amount of \$53.34 USD. A gross amount of \$53.34 USD is also shown.
- Supplier Information**: Supplier Location (WB Mason Company, 647 Summer Street Boston, MA 02210 United States) and Supplier Part Number (GMT6520).
- Supplier Auxiliary Part ID**: C-61482672|5830147607.
- Navigation Tabs**: Accounting, Shipping, Comments, Attachments, and Others, each with a right-pointing arrow.
- Annotations**: Red circles and boxes highlight specific UI elements: 5 (collapse arrow), 6 (three dots menu), and 7 (expand arrow).

5 Click the arrow to expand at the line level. Quantity, pricing, and supplier information will display at the top. If a supplier has multiple locations (e.g. [Fisher Scientific](#)) select the correct address

6 Select the three dots to delete the line item.

7 Select the arrow next to each tab to view details and make changes.

Note:

- Errors noted in red are required fields and must be addressed to submit the PR.
- The following header information will flow to the line level: Ship to, Deliver to, Need by date, Charge to and Requestor. These fields can be edited at the line level.
- Comments and attachments can be added at the line or header level.
- Click the tool tip icon to learn what needs to be entered in that field.

Checkout Process

Accounting details will populate based on header information and Personal Profile.

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8 Account Assignment * (K (Cost center))

9 GL Account (0000510030 (CONSUMABLE SUPPLIES ...))

10 Cost Center (1471780000 (RADIO BOSTON))

11 Choose

BOSTON UNIVERSITY

Cost Center	Description	Choose
1202020000	BIOLOGY	Choose
2572030000	BS--MICROBIOLOGY	Choose
1202020020	Biology LA Program	Choose

8 Click the drop down to select the **Account Assignment** (i.e., Cost Center, Project/WBS Element, Order).

9 The **GL Account** populates based on the commodity.

10 Click the drop down to change the **Cost Center**. History will display. Click **Browse all** to view options.

11 Specify search criteria (i.e., Description or Cost Center). Search and click **Choose**.

Checkout Process

PRs can be split between the same Cost Object Type (e.g., Cost Center to Cost Center) by percentage, quantity, or amount.

IMPORTANT:
If charging a cost center and a Sponsored IO#, **100% of the cost must be charged to the Cost Center**, then do a Journal Entry to charge the Sponsored IO#.

- 12 To split the order between cost object types, click **Split Accounting**.
- 13 Assign the **Split accounting type**.
- 14 Select the drop down next to each cost object type to assign the **Percentage** and **Cost Center**.

The screenshot displays the checkout process interface with several key elements highlighted by red boxes and numbered callouts:

- 12** A red box highlights the "Split accounting" button in the Accounting section.
- 13** A red box highlights the "Split accounting type" dropdown menu, which is set to "Percentage".
- 14** A red box highlights the "Percentage" dropdown menu for the first cost object type, which is set to "50%".

The interface shows the following details:

- Accounting Section:** Account Type: Expense; Bill To: TRBU (Boston University); GL Account: 0000510030 (CONSUMABLE SUPPLIES ...); Cost Center: 1202020000 (BIOLOGY).
- Split Accounting Summary:** Amount to split: \$53.34 USD; Allocated percentage: 100.00%; Unallocated percentage: 0.00%.
- Split Accounting Table:**

Split accounting type	Amount to split	Allocated percentage	Unallocated percentage
Percentage	\$53.34 USD	100.00 %	0.00 %

Percentage	Quantity	Amount
100 %	2.00	\$53.34 USD
- Cost Object Types:**
 - Cost Center (1020400003 (SOURCING & PROC)): Percentage 50%, Quantity 1.00, Amount \$26.67 USD. Cost Center dropdown is set to 1020400003 (SOURCING & PROC).
 - Cost Center (1202020000 (BIOLOGY)): Percentage 50%, Quantity 1.00, Amount \$26.67 USD. Cost Center dropdown is set to 1202020000 (BIOLOGY).



Note: Costs can only be split between the same cost object type (i.e., between two cost centers; two internal orders; two WBS elements).

Checkout Process

View shipping details and make necessary updates. If you have multiple lines with different **Ship To** addresses, set the **Ship To** and the **Deliver To** at the line level. To avoid delivery delays, please ensure your **Deliver To** is populated or you risk your package being returned to the Supplier.

> Accounting Cost Center (1020400003 (SOURCING & PROC))/Cost Center (1202020000 (BIOLOGY))

Shipping 975 Commonwealth Avenue, Boston

ShipTo(Plant) * ⓘ **15**

5450 (975 Commonwealth Avenue) ▾

975 Commonwealth Avenue Boston, MA 02215
United States

Deliver To * ⓘ JDoe, Floor 1 #120

Need-by Date ⓘ 6/10/20

Purchase Group 103 (PGroup 103) ▾

ShipTo(Plant) * ⓘ

1000 (General Plant) ^

Clear selection

900001 (0 Carlton Street)

900018 (1010 Commonwealth Avenue)

900013 (Boston University)

900161 (Boston University)

Browse all

ShipTo(Plant) X

Street ▾ buick 🔍

New

ID	Street	City	State	Postal Code	Country		
Name						Choose	
Street	buick Street	10 Buick Street	Boston	MA	02215	US	Choose
City	buick Street	25 Buick Street	Boston	MA	02215	US	Choose
State							
Postal Code							
Country							

15 Update the **Ship To** for the line level by selecting the drop down under **ShipTo(Plant)**. Previously used addresses will display. Click **Browse all**.

16 Change search criteria from **ID** to **Street** or **Name**.

17 Search for the address. Click **Choose** next to the appropriate address.

Deliver To and **Need-by Date** flow from header level.



Note: Click **New** to add a non-BU delivery address. Enter a comment noting that this is being sent to a non-BU address. If the purchase is <\$500, manually add your financial approver as an approver to the PR to route for approval.

Checkout Process

Add any necessary internal or external comments and/or attachments for this line. Comments and attachments can also be added at the header level.

The screenshot displays two sections: 'Comments' and 'Attachments'. In the 'Comments' section, a text box for writing comments is highlighted with a red box and the number 18. To its right, a checkbox labeled 'Share with supplier' and an 'Add' button are highlighted with a red box and the number 19. Below this, two comments are shown. The first comment is from JILL BROWN on 5/28/20, with an 'Internal Note' and a 'Remove' link. The second comment is also from JILL BROWN on 5/28/20, with a 'Shared with supplier' tag and a 'Supplier-Can you please ship these items by 6/4?' message, also with a 'Remove' link. The 'Attachments' section below has a dashed box for file uploads with a 'browse to upload' link highlighted by a red box and the number 20. To its right, another 'Share with supplier' checkbox and 'Add' button are highlighted with a red box and the number 21. A partial attachment is visible at the bottom, labeled 'WB Mason Orde...'.

18 Under the Comments section, enter **Comments** in the text box.

19 Check **Share with supplier*** to share with the supplier. If unchecked it will only display internally. Click **Add**.

20 Under the Attachments section, click **Browse** to upload the attachment.

21 Check **Share with supplier*** if necessary. Click **Add**.



Note:

***Share with supplier:** Check to share internally and with the supplier, unchecked will display internally only. Do not share attachments with suppliers on catalog orders. Comments/attachments shared with suppliers are noted in blue.

Requirement: Orders of ≥\$10,000 require an attachment before the PR can be submitted. View the [Competitive Bid Requirements on the Policy Website](#).

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Further information for the line item can be found in the other drop down. For Non-Catalog PRs, the **Order Type** field must be updated to Standard or Amount Based.

22 Others

Commodity Code ⓘ	Material Group
SUPPLIES-OFFICE	44120000 (Office Supplies)
Item Category * ⓘ	Payment Terms
Material	Z140 - 2% 10 days, Net 30
Incoterms Code	Incoterms Location
Free On Board	Not specified
Purch Org	Line Item Text ⓘ
1000 (Sourcing & Procurement)	
Contract ⓘ	Order Type *
(no value)	

23

Order Type *

⚠ Order Type must be set.

- Clear selection
- Standard
- Amount Based

22 Expand the **Others** section. Review other details for the PR.

Contract: Certain items are associated with BPO contracts.

23 **Order Type:** Non-Catalog PRs must be designated as Standard or Amount Based by updating the **Order Type** field. Select **Amount Based** for services or if you are expecting multiple invoices, and **Standard** for materials.

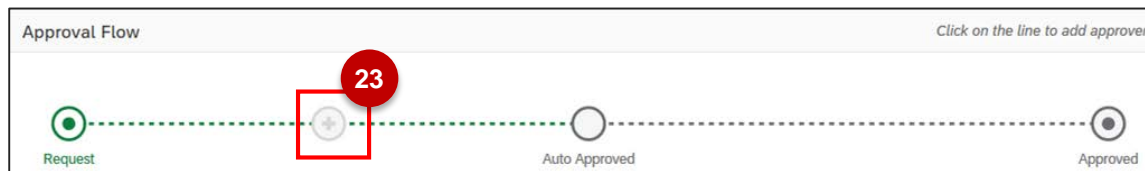
Do not change this for catalog orders.



Moveable Capital Equipment: When purchasing any moveable equipment, select the GL code 510100 Non-capital Minor Equipment. The PR will go to Property Management who will adjust the GL to capital equipment, asset tag, and update inventory. [Sourcing & Procurement website](#).

Checkout Process

View the approval flow. System generated approvers cannot be removed. Add an approver/watcher to the workflow if necessary. Watchers can view requests, but no action is required. Approvers must approve requests before they can move forward.



Add Approval Request

Add this approval request as Approver Watcher

Provide a reason: Optional

Email Address - bacci

Email Address	Name	ID
mbacci@bu.edu	MARY BACCI	MBACCI

Choose

Cancel OK

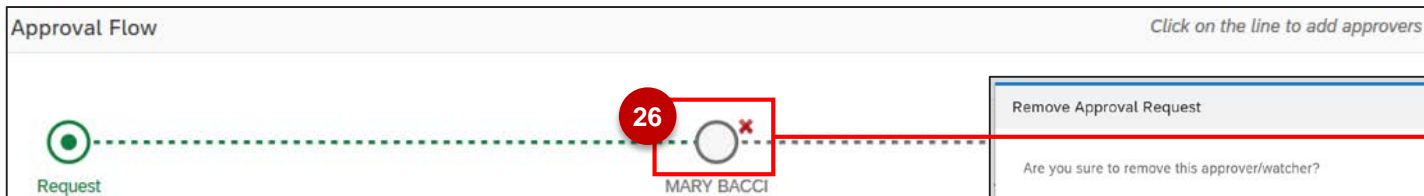
23 Hover over the approval workflow and click the + icon where you want to add an approver/watcher.

24 Click the button next to **Approver** or **Watcher**.

25 Search and click **Choose** next to the appropriate name. Click **OK**.

26 **Removing Approver/Watcher:** Click the remove icon next to the name to remove. Click **Remove**.

View updated approval workflow.



Remove Approval Request

Are you sure to remove this approver/watcher?

Cancel Remove



Note:

- Add watchers if other team members need to see your PR, but their approval is not required.
- Only added watchers/approvers can be removed.

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When you are ready, click the three dots to validate request before you click **Submit**. Once submitted, the first approver in the workflow will receive the request.

Supplies for Sourcing & Procurement
Checkout / PR14375
Total Cost \$53.34 USD

Submit Save and exit ...

Contract (no value) Order type Standard

Comments

Write your comment... Share with supplier Add


Attachments

Drag and drop file here, or browse to upload Share with supplier Add

Approval Flow *Click on the line to add approvers*

Request Auto Approved Approved

Continue shopping

27 Once review is finalized, click the symbol  to validate and check for errors.

Resolve any errors and click **Submit**. The PR will move to the first approver.

Other Actions:

- **Save & exit:** save and submit PR later. Saved PRs are available under the **Your Requests** tab.
- **Continue shopping:** add additional items.

Checkout Process

Once submitted, you will receive a confirmation on the screen and via email. Next, the first approver in the workflow will receive the PR.

Submitted

Approval Flow *Click on the line to add approvers*

Request BUWTR Approved

Success

Your requisition has been sent for approval.

Done View requisition

Comments

Write your comment...

Shop Your Favorites **Your Requests** 29 Approvals

General Goods & Services Campus Planning & Operations Marketing & Advertising

Request ad hoc item +

Request on behalf of

Recent requests

PR645 Submitted
Fisher Scientific Punchout Catalog
\$2,317.30 USD
Requested 0 days ago

PR643 Composing
Fisher Scientific Punchout Catalog
\$0.00 USD

Next Steps:

- You will receive an email notification if the PR is approved. Once a PR is approved, it automatically generates a PO.
- If the PR is not approved, the Requisitioner will need to modify and re-submit.
- Navigate to **Your Requests** on the homepage of **Guided BUying** to view previously placed PRs and their statuses.



28 View confirmation. Click **Done** or **View Requisition**.

29 You will receive an email notification when the PR is approved.

Alternatively, navigate to **Your Requests** on the homepage of **Guided BUying** to view previously placed PRs and their statuses.