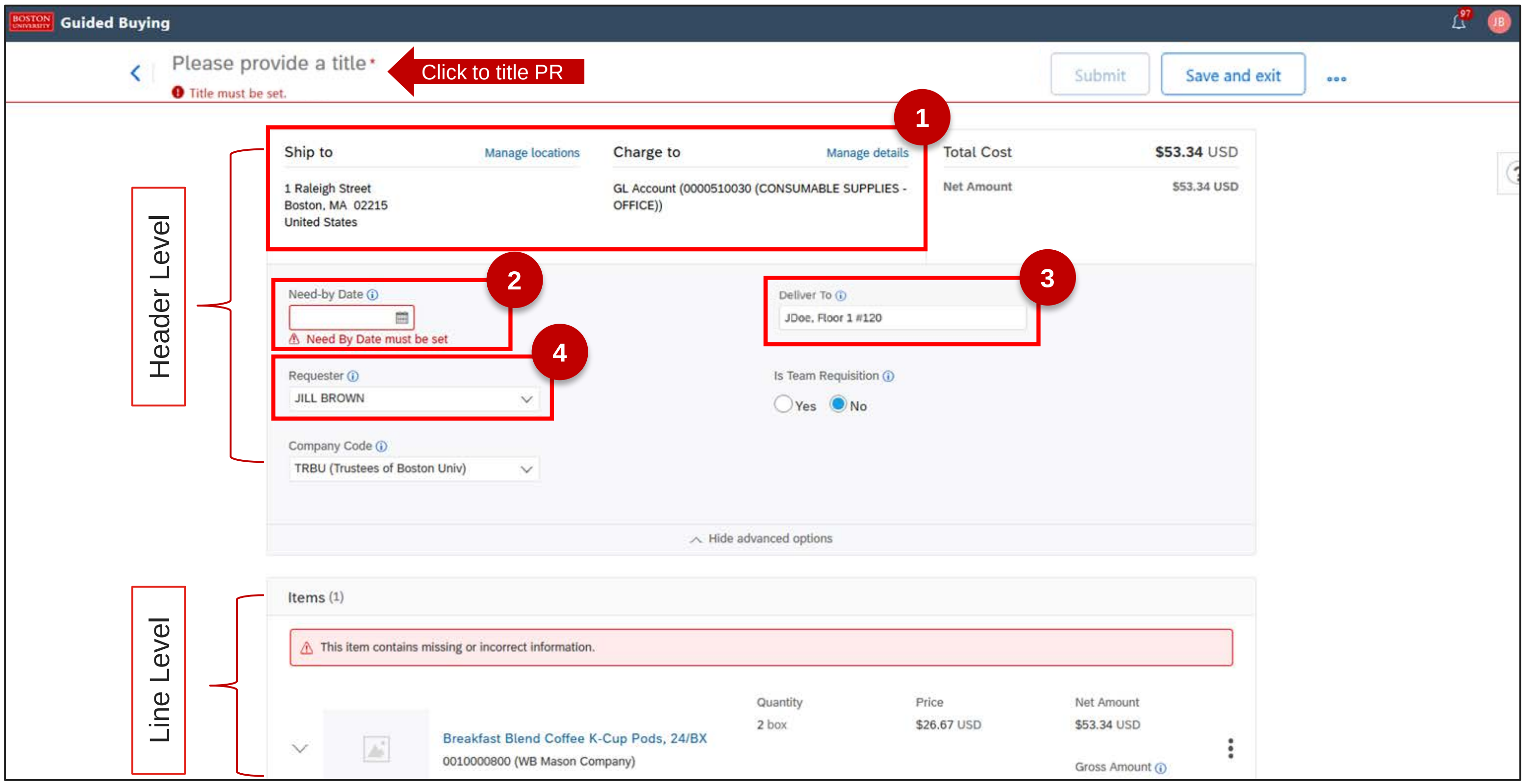
Checkout Process

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.

   Click **Manage details** to update the **Charge 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.

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.

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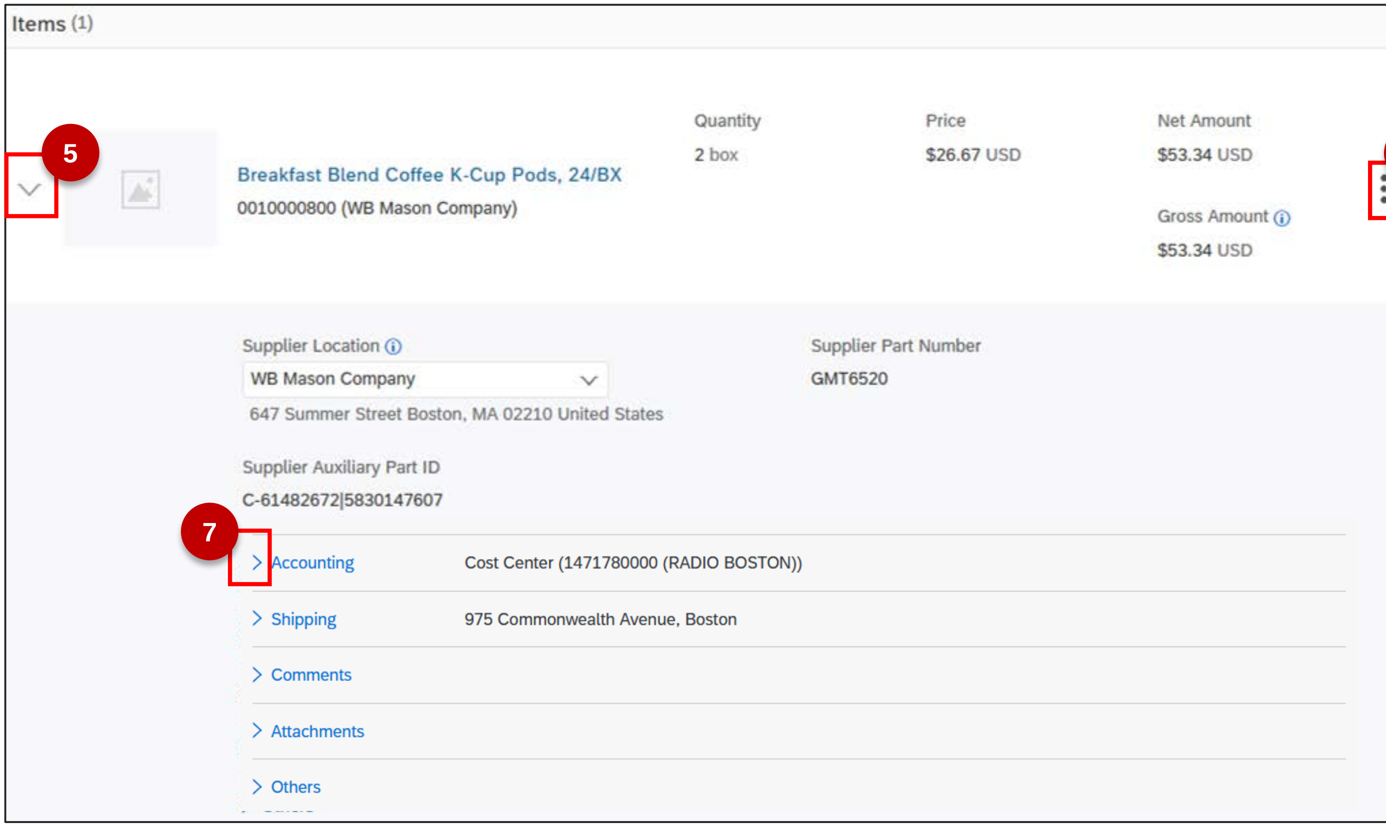
Checkout Process

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



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.

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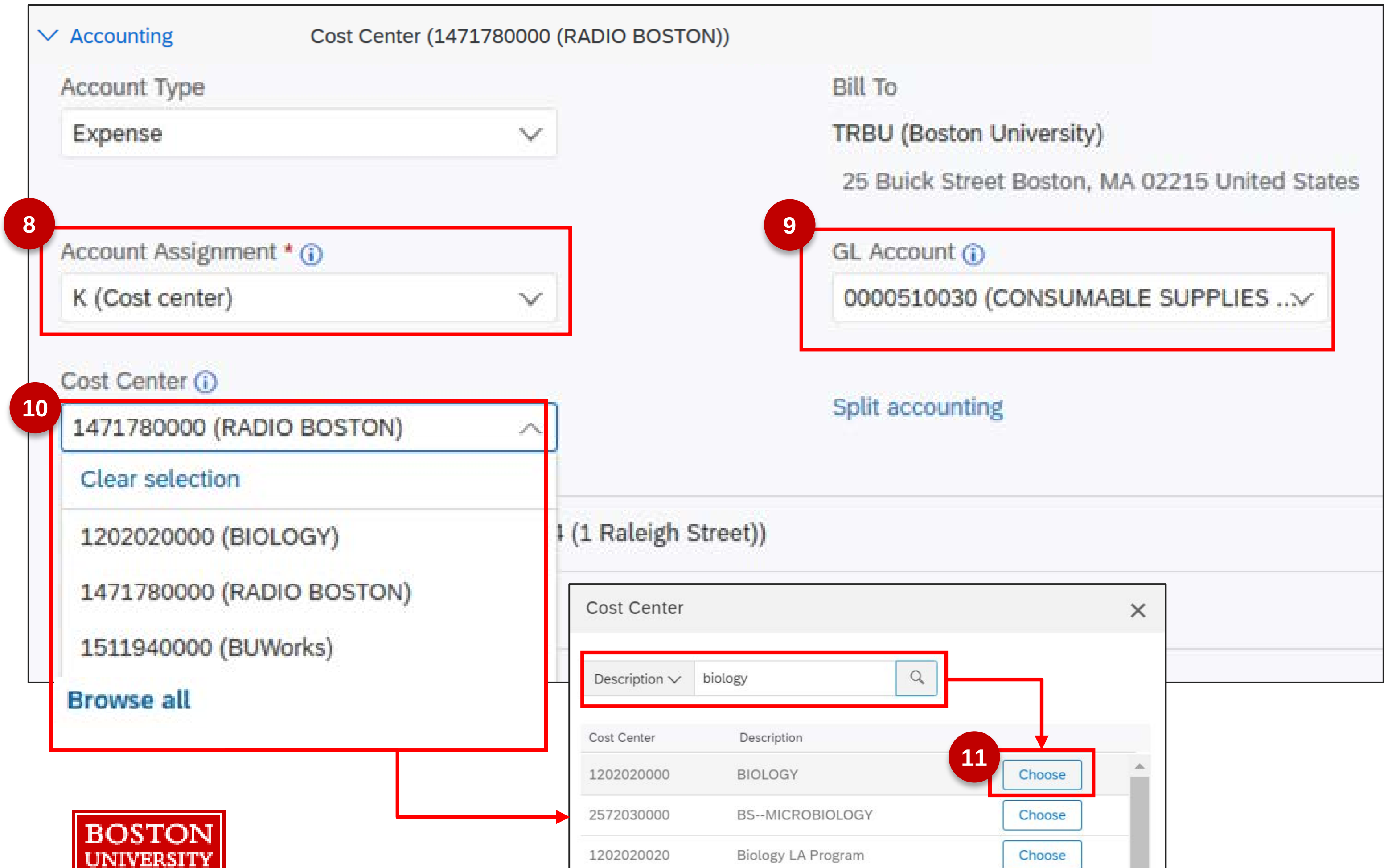
Accounting details will populate based on header information and Personal Profile.



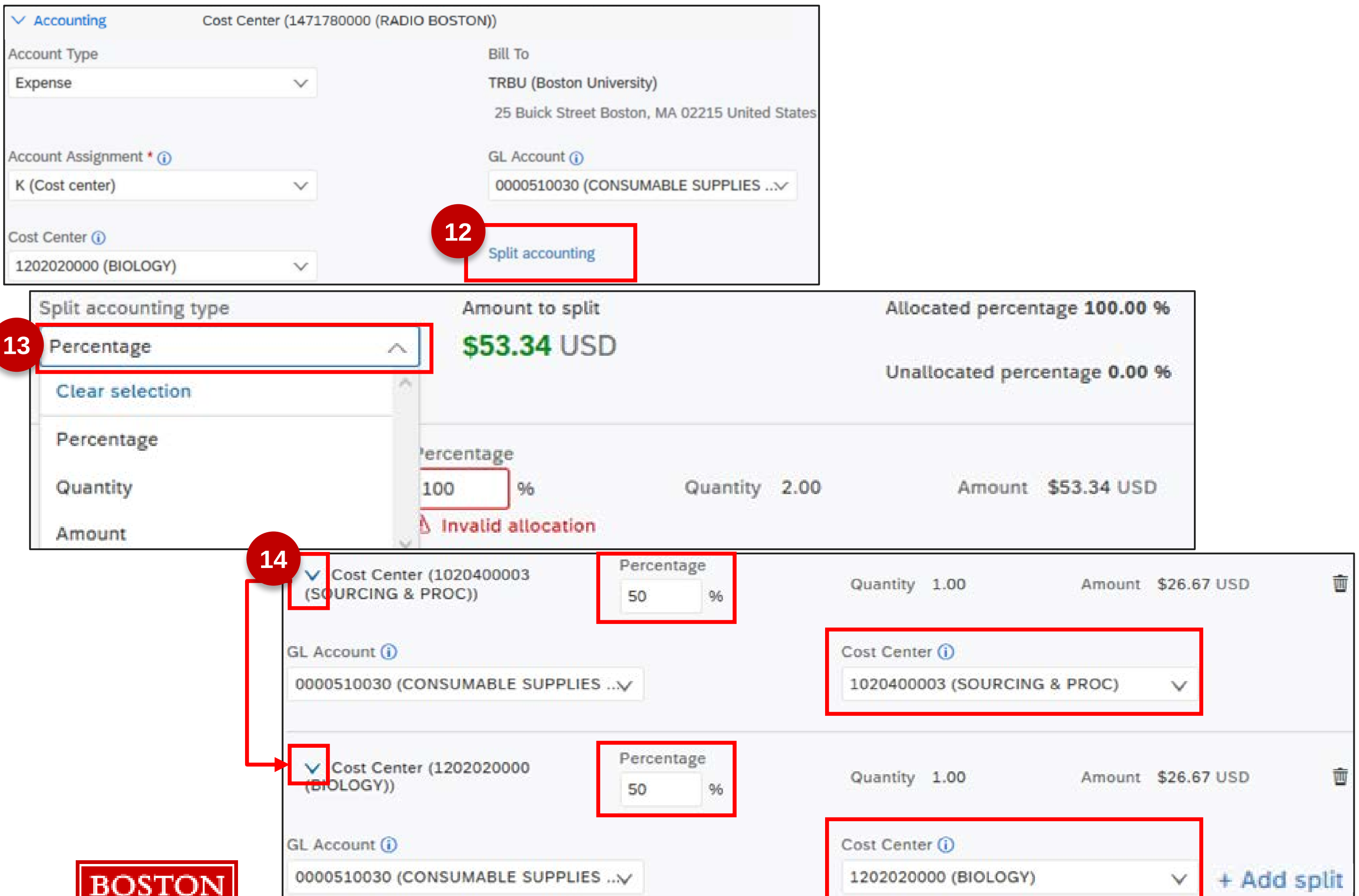
8 Click the drop down to select the **Account Assignment** (i.e., Cost Center, Project/WBS Element, Order).

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**.

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



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

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**.

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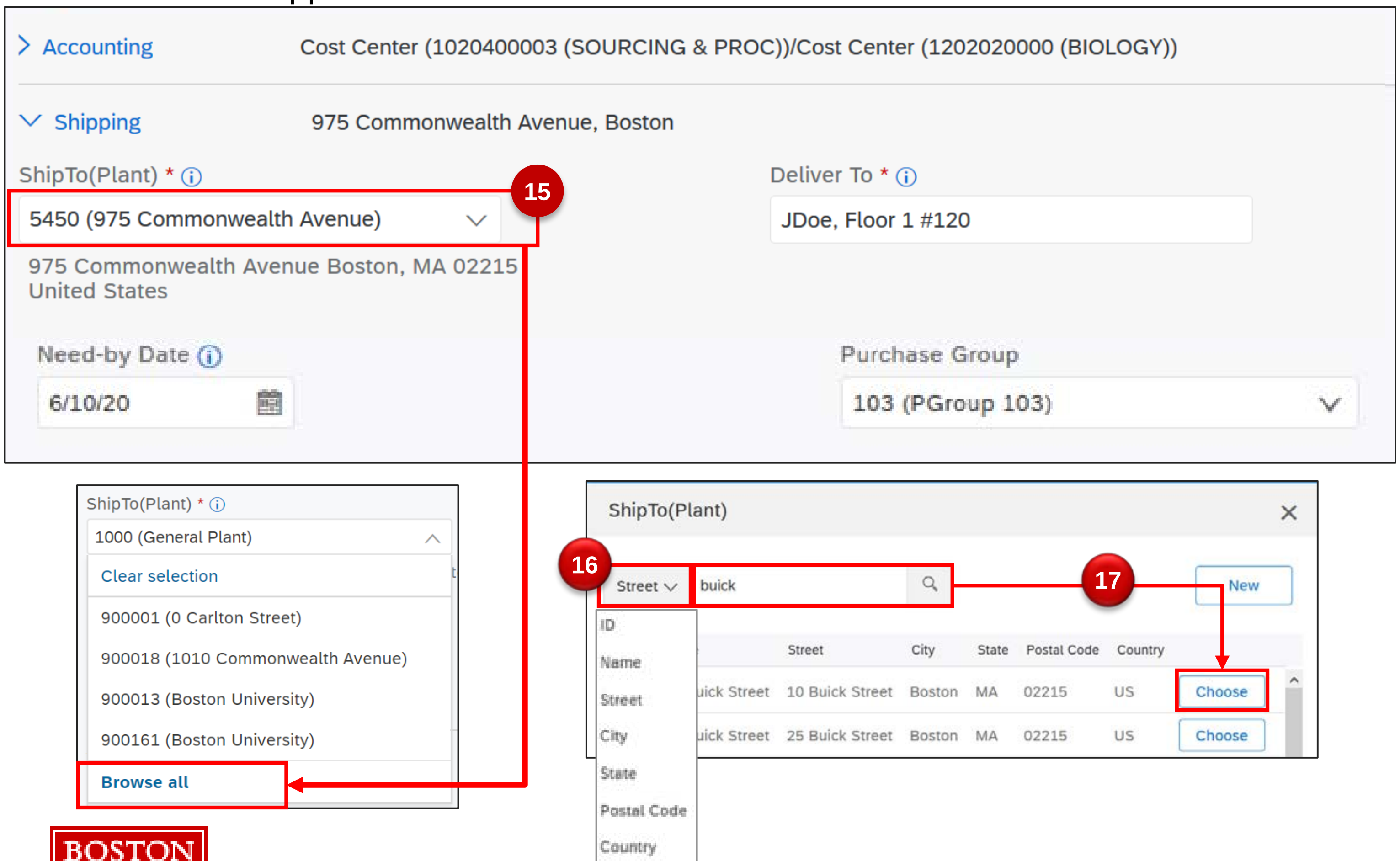
View shipping details and make necessary updates. If you have multiple lines with different **Ship To** addresses, set the **Ship To** and the **Deliver To** at the line level. To avoid delivery delays, please ensure your **Deliver To** is populated or you risk your package being returned to the Supplier.



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**.

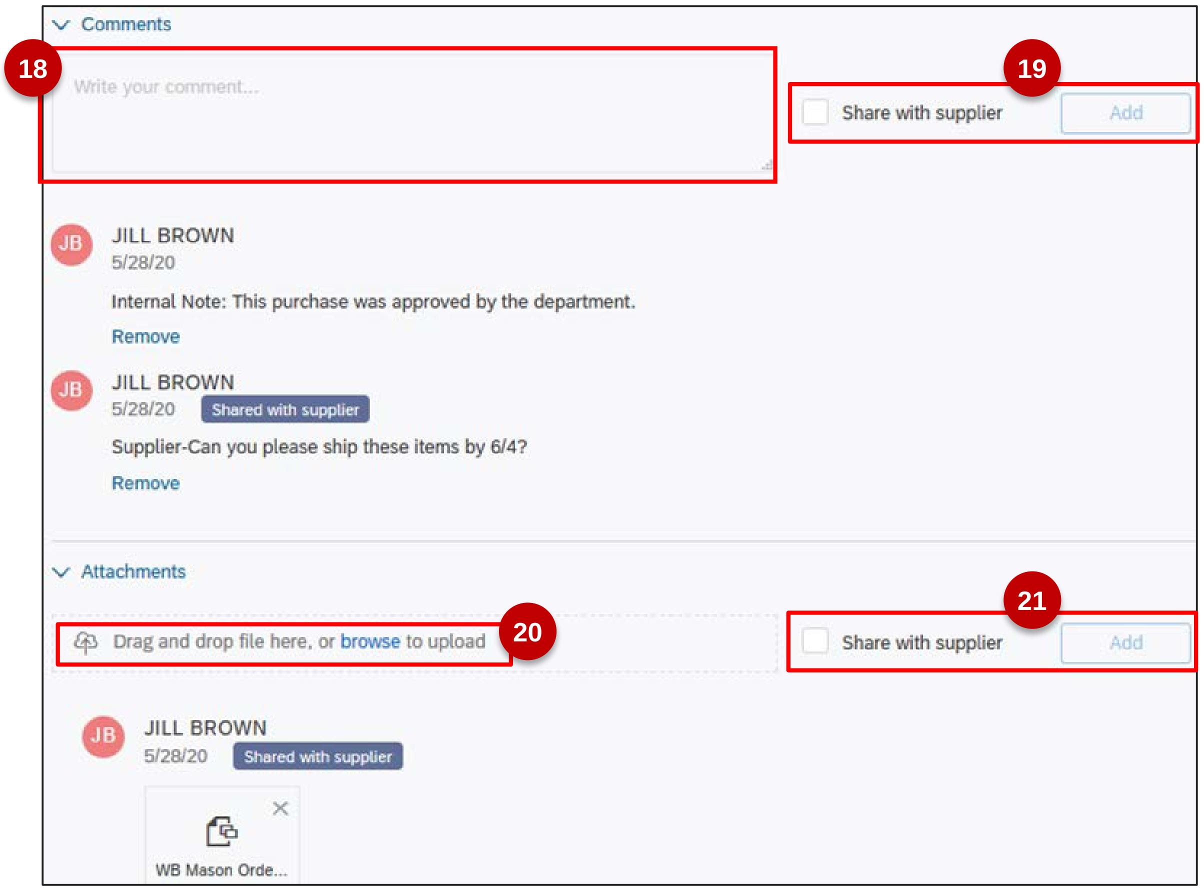
16 Change search criteria from **ID** to **Street** or **Name**.

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 an 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.

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



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

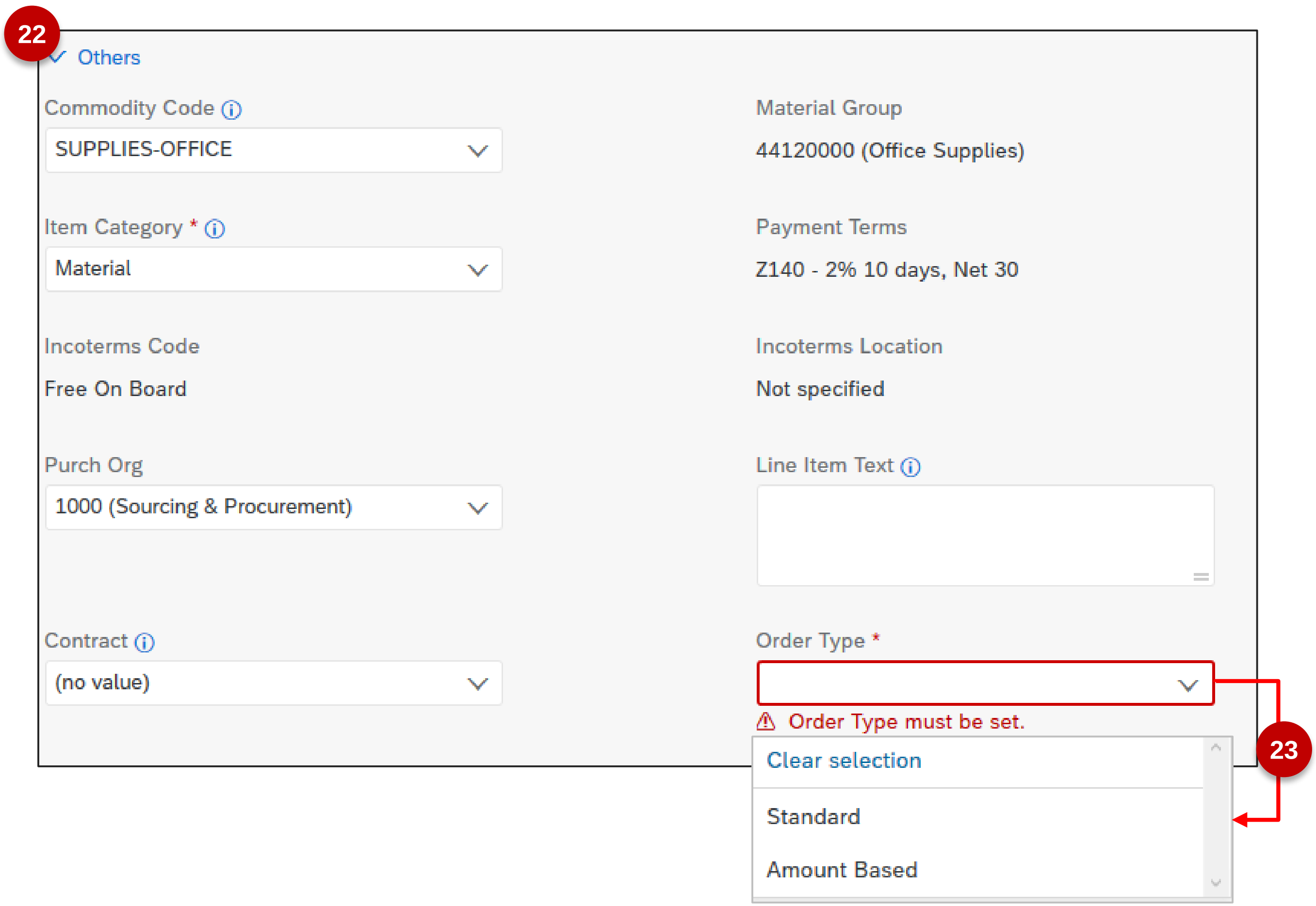
19 Check **Share with supplier*** to share with the supplier. If unchecked it will only display internally. Click **Add**.

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.

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

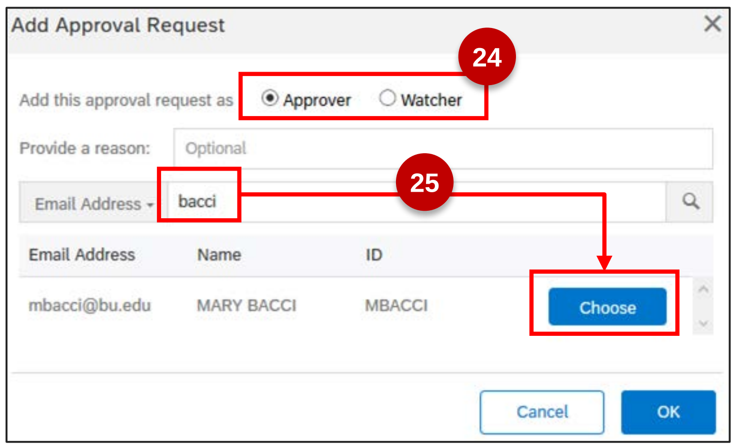
Contract: Certain items are associated with BPO contracts.

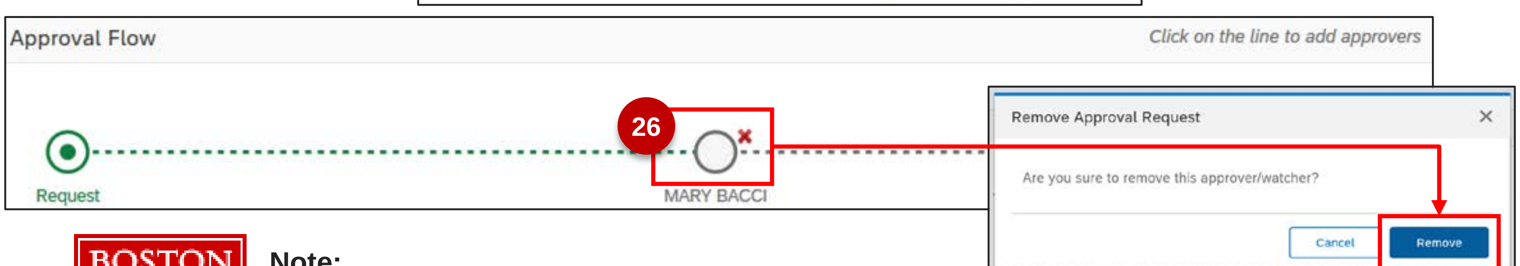
23 **Order Type**: Non-Catalog PRs must be designated as Standard or Amount Based by updating the **Order Type** field. Select **Amount Based** for services or if you are expecting multiple invoices, and **Standard** for materials. **<u>Do not change this for catalog orders.</u>**

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.





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.

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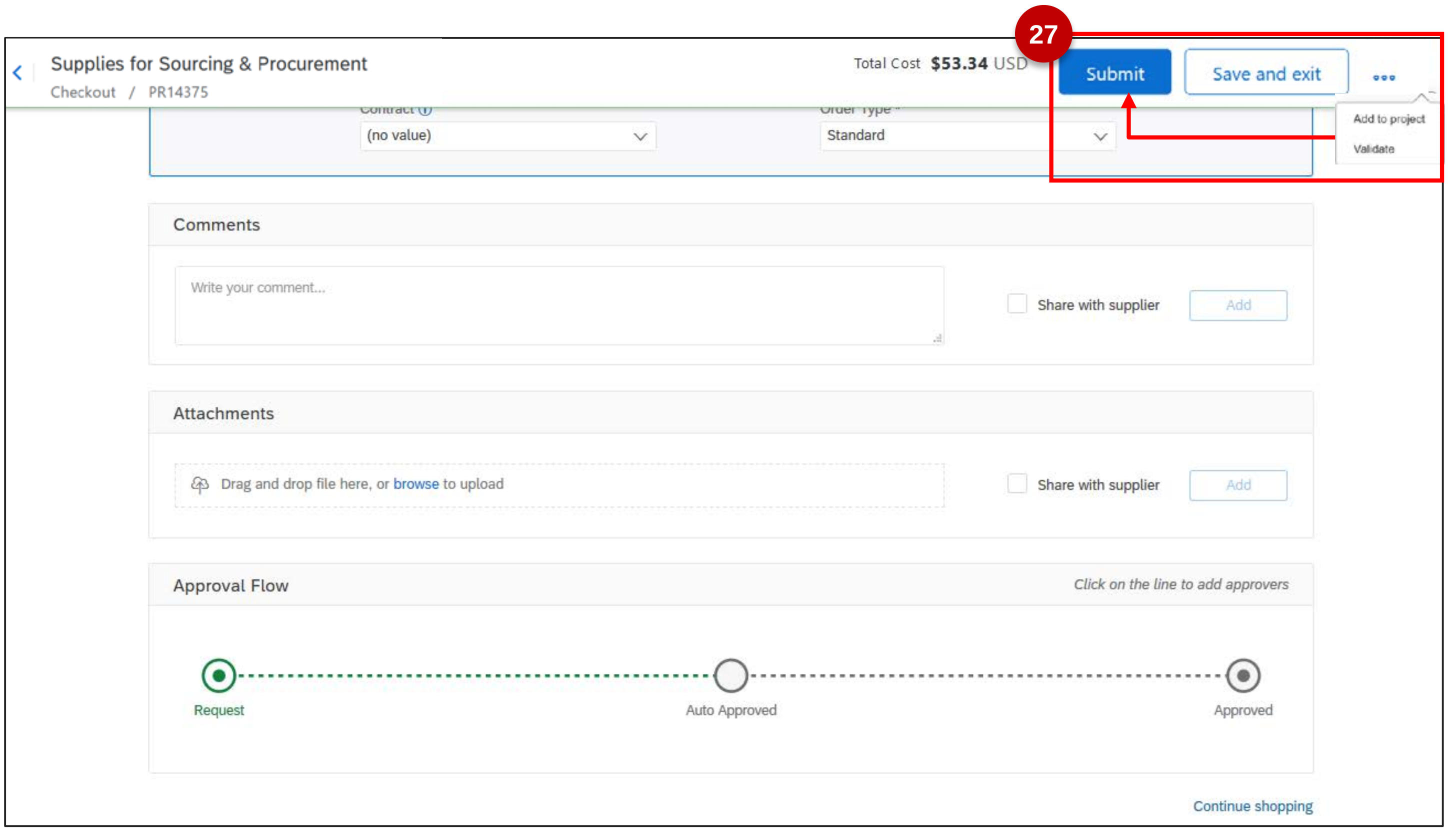
Note:

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

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.



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.

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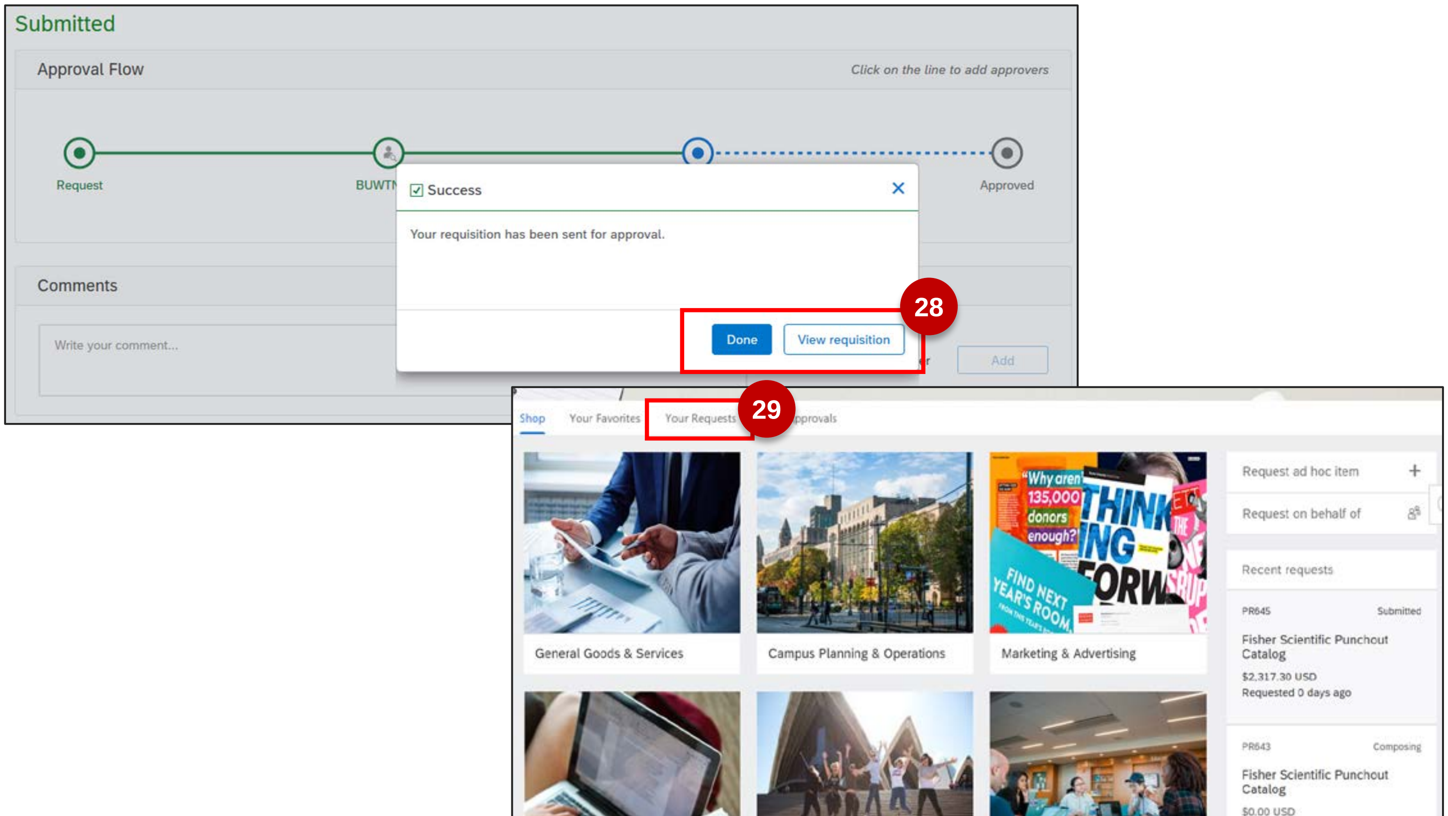
Checkout Process

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



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.

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.

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