

Checkout Process



Checkout Process – Review header information

- Review header information (populates 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 need to send the order to multiple addresses, create separate PRs for each address.
- If purchasing from a catalog supplier (e.g., WB Mason), set the **Ship to** and **Deliver To** at header level.
- NOTE: you must address all red/required fields to submit the PR

- 1 Click **Manage Locations** to update the **Ship to** information.
- 2 Enter a **Need By Date***. We recommend 5 days. This is a system requirement, but does not bind a supplier to that 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 header bar with 'Please provide a title*' and a red arrow pointing to it with the text 'Click to title PR'. Below this, the 'Header Level' section contains several fields: 'Ship to' (with a 'Manage locations' link), 'Charge to' (with a 'Manage details' link), 'Total Cost' (\$53.34 USD), 'Net Amount' (\$53.34 USD), 'Need-by Date' (with a red warning 'Need By Date must be set' and callout 2), 'Deliver To' (JDoe, Floor 1 #120, with callout 3), 'Requester' (JILL BROWN, with callout 4), 'Is Team Requisition' (No), and 'Company Code' (TRBU (Trustees of Boston Univ)). A 'Hide advanced options' link is at the bottom of the header section. Below the header is the 'Line Level' section, which shows a table with one item: 'Breakfast Blend Coffee K-Cup Pods, 24/BX' (0010000800 (WB Mason Company)) with a quantity of 2 boxes, a price of \$26.67 USD, and a net amount of \$53.34 USD. A red warning banner above the table states 'This item contains missing or incorrect information.'

Note:



- *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.
- Click the tool tip icon to learn what needs to be entered in that field.

Checkout Process – Review line level detail

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

Items (1)

	Quantity	Price	Net Amount
  Breakfast Blend Coffee K-Cup Pods, 24/BX 0010000800 (WB Mason Company)	2 box	\$26.67 USD	\$53.34 USD
			Gross Amount ⓘ \$53.34 USD

Supplier Location ⓘ
WB Mason Company
647 Summer Street Boston, MA 02210 United States

Supplier Part Number
GMT6520

Supplier Auxiliary Part ID
C-61482672|5830147607

 Accounting Cost Center (1471780000 (RADIO BOSTON))

 Shipping 975 Commonwealth Avenue, Boston

 Comments

 Attachments

 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), be sure to 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

Accounting details populate based on header information and Personal Profile.

Accounting details page showing the following fields:

- Accounting: Cost Center (1471780000 (RADIO BOSTON))
- Account Type: Expense
- Account Assignment: K (Cost center)
- GL Account: 0000510030 (CONSUMABLE SUPPLIES ...)
- Cost Center: 1471780000 (RADIO BOSTON)
- Bill To: TRBU (Boston University), 25 Buick Street Boston, MA 02215 United States

Split accounting

Cost Center (1 Raleigh Street)

Search results for 'biology':

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

BOSTON UNIVERSITY

- 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 – Split Accounting

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 & Sponsored IO, 100% of the cost must be charged to the Cost Center. Do a Journal Entry to charge the Sponsored IO#.

12 To split 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**.

Accounting Cost Center (1471780000 (RADIO BOSTON))

Account Type Expense Bill To TRBU (Boston University)
25 Buick Street Boston, MA 02215 United States

Account Assignment * K (Cost center) GL Account 0000510030 (CONSUMABLE SUPPLIES ...)

Cost Center 1202020000 (BIOLOGY) **12** Split accounting

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

Clear selection

Split accounting type	Percentage	Quantity	Amount
Percentage	100 %	Quantity 2.00	Amount \$53.34 USD

Invalid allocation

14

Cost Center (1020400003 (SOURCING & PROC))	Percentage 50 %	Quantity 1.00	Amount \$26.67 USD
GL Account 0000510030 (CONSUMABLE SUPPLIES ...)		Cost Center 1020400003 (SOURCING & PROC)	
Cost Center (1202020000 (BIOLOGY))	Percentage 50 %	Quantity 1.00	Amount \$26.67 USD
GL Account 0000510030 (CONSUMABLE SUPPLIES ...)		Cost Center 1202020000 (BIOLOGY)	+ Add split

Checkout Process – Shipping details

- 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) * ⓘ

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)

Street ▼ buick

New

ID	Street	City	State	Postal Code	Country	
Name						
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. Update at line level if necessary.



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 – Comments/Attachments

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 input field is highlighted with a red box and a callout '18'. To its right, a checkbox labeled 'Share with supplier' and an 'Add' button are highlighted with a red box and a callout '19'. Below this, two comments are shown. The first comment is from JILL BROWN (JB) dated 5/28/20, with the text 'Internal Note: This purchase was approved by the department.' and a 'Remove' link. The second comment is also from JILL BROWN (JB) dated 5/28/20, with the text 'Supplier-Can you please ship these items by 6/4?' and a 'Remove' link. A blue 'Shared with supplier' tag is present next to the second comment. In the 'Attachments' section, a dashed box for file upload is highlighted with a red box and a callout '20'. To its right, another 'Share with supplier' checkbox and 'Add' button are highlighted with a red box and a callout '21'. Below this, an attachment is shown with a blue 'Shared with supplier' tag and a thumbnail image labeled 'WB Mason Orde...'. The 'Add' button in the attachments section is highlighted with a red box and a callout '21'.

18 Enter **Comments** in text box if necessary.

19 Check "**Share with supplier**" and click "Add" to make comment(s) visible to supplier. Leave unchecked to keep comments visible internally only.

20 In the Attachments section, click "**Browse**" to identify document to upload.

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

Note:

- Comments/attachments shared with suppliers are noted in blue.
- **Requirement:** Orders of $\geq \$10,000$ require an attachment before the PR can be submitted. View the [Competitive Bid Requirements on the Policy Website](#).

Checkout Process – “Others” section

Further information for the line item can be found in the “Others” section.

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) ▼	<input type="text"/>
Contract ⓘ	Order Type *
(no value) ▼	<input type="text"/>

⚠ Order Type must be set.

- Clear selection
- Standard
- Amount Based

23

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. Select **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](#).

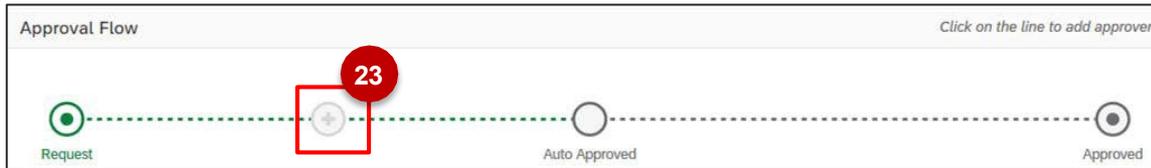
Checkout Process – Approval Flow

View the approval flow.

- System-generated approvers cannot be removed.
- You can add approver(s)/watcher(s) to the workflow if necessary.

Approvers must approve requests before they can advance in the workflow.

Watchers can view requests, but no action on their end is required.



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

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

25 Search & 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.

Checkout Process – Submit

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 After completing all required fields and reviewing, click the to validate and check for errors.

Resolve any errors and click **“Submit.”** The request will move to the first approver in the workflow.

Other Actions:

(1) Save & exit:

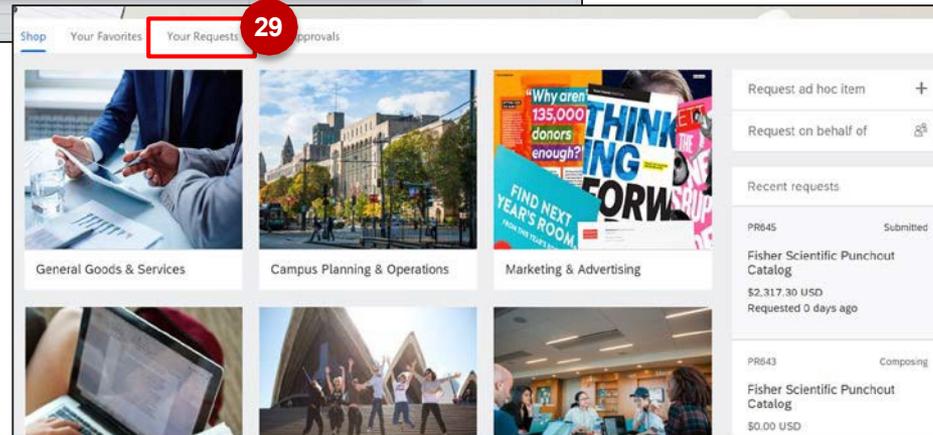
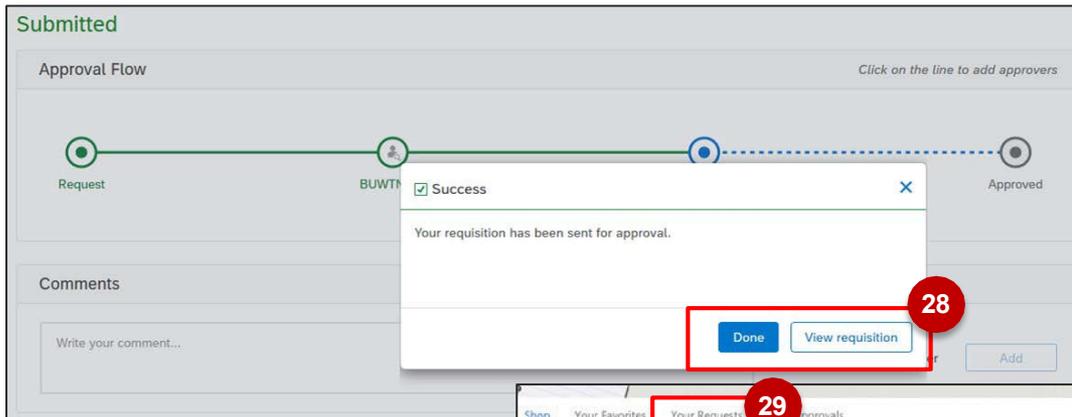
To save and finish PR later. Saved PRs can be viewed under the **Your Requests** tab.

(2) Continue shopping:

To add additional items.

Checkout Process

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



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 the **Your Requests** tab on the homepage of **Guided BUYing** to view previously placed PRs and their statuses.