

## Updating Accounting and Shipping at the Header

## Setting Shipping Address

Within **Guided BUYing**, requisitioners can set shipping at the header level or line level.

### Header Level:

Set **Ship To** and **Deliver To** at header level when all lines in the PR are being shipped to one address.

Note: Deliver To at the line level does not update the header level.

If purchasing from a catalog supplier (e.g., WB Mason), set the delivery address at the header level. If you need to send the order to multiple addresses, create separate PRs for each address.

### Line Level:

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.

## Updating Accounting and Shipping at the Header

- At checkout, information from your personal profile will populate.
- Edits to the **Ship to** and **Charge to** can be made at the header level.

Microscope  
Checkout / PR14380

Submit Save and exit ...

Ship to	Charge to	Total cost
120 Ashford Street Boston, MA 02215 United States	Cost Center (1471780000 (RADIO BOSTON))	\$5,000.00 USD
		Net amount \$5,000.00 USD

▼ Show additional details

**Manage locations**

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

Shipping

ShipTo(Plant) \* ⓘ

5037 (120 Ashford Street) ^

Clear selection

5037 (120 Ashford Street)

5423 (881 Commonwealth Avenue)

erika Ionardo

5255 (541 Commonwealth Avenue)

Browse all

States

Deliver To \* ⓘ

ELonardo, Floor 1 #120

Purchase Group

103 (PGroup 103) v

**1** Shipping at Header Level: Click "**Manage locations**" to update the **Ship to** information.

**2** Update the **Ship To** for the header level by selecting the drop down under **ShipTo(Plant)**.

Previously used addresses will display. Click "**Browse all.**"

## Updating Accounting and Shipping at the Header

- Update the search criteria from **ID** to **Street** or **Name** and search for the appropriate address.
- After selecting the address, enter a **Deliver To** including name, floor, and room number.

3

4

5

ShipTo(Plant)

Street buick

ID

Name	Street	City	State	Postal Code	Country
ck Street	10 Buick Street	Boston	MA	02215	US
ck Street	25 Buick Street	Boston	MA	02215	US

Choose

Choose

State

Postal Code

Country

**Manage locations**

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

**Shipping**

ShipTo(Plant) \* ⓘ

5007 (10 Buick Street) ▼

10 Buick Street Boston, MA 02215 United States

Need-by Date ⓘ

2/15/21

**Deliver To** \* ⓘ

ELonardo, Floor 2 #34

Purchase Group

103 (PGroup 103) ▼

Shipping items to different locations?

Done

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

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

View updated address.

5 Update **Deliver To** including name, floor, and room number. We recommend using abbreviations as certain suppliers can only accept 30 characters in this field.

Click **Done**.

# Updating Accounting and Shipping at the Header

Select **Manage details** to update **Accounting** information.

Ship to	<a href="#">Manage locations</a>	Charge to	<a href="#">Manage details</a>	Total cost	\$5,000.00 USD
10 Buick Street Boston, MA 02215 United States		Cost Center (1471780000 (RADIO BOSTON))		Net amount	\$5,000.00 USD
<a href="#">Show additional details</a>					

**Manage details**

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

**Charge to**

Account Assignment \* ⓘ  
K (Cost center) ^  
K (Cost center)  
P (Project)  
F (Order)

Account Type  
Expense v

GL Account ⓘ  
0000571410 (NON-MOVEABLE CAPITAL ... v

**Cost Center** ⓘ  
1471780000 (RADIO BOSTON) ^  
[Clear selection](#)  
1202020000 (BIOLOGY)  
1020400003 (SOURCING & PROC)  
[Browse all](#)

Done

6 **Accounting:**  
Click **Manage details**.

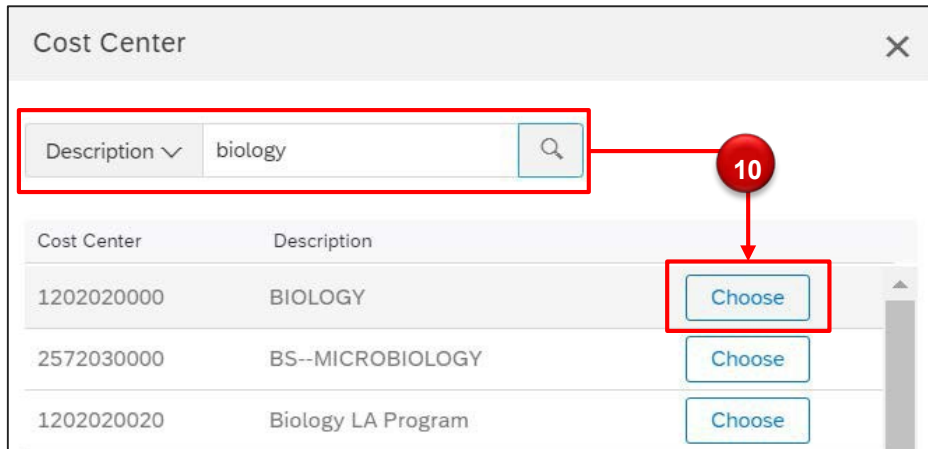
7 Click the drop down to select the **Account Assignment** (i.e., Cost Center, Project/WBS Element, Order).

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

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

## Updating Accounting and Shipping at the Header

Select the appropriate accounting information. After updating accounting and shipping, make any other necessary changes before submitting the PR.



Cost Center

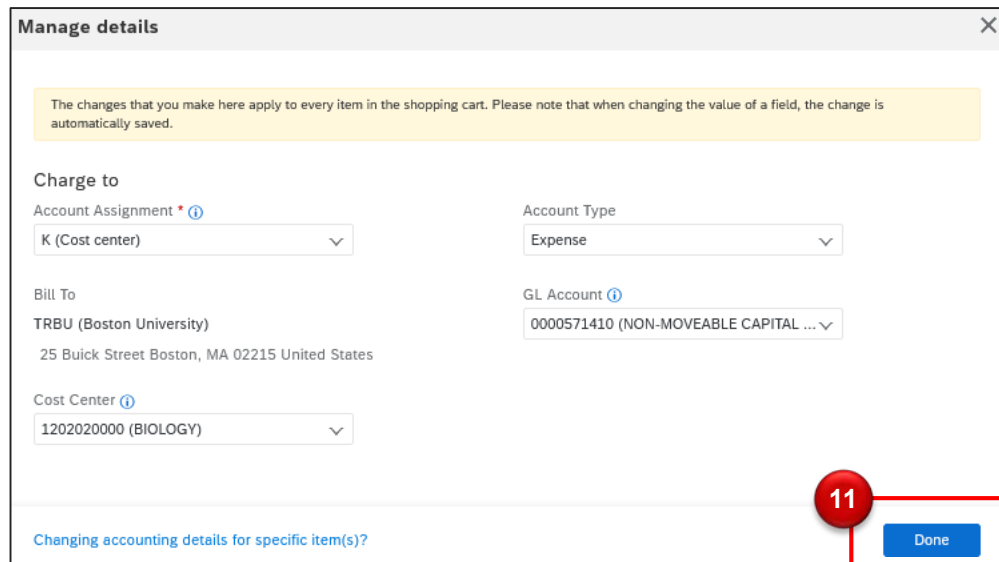
Description ▾ biology

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

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

View updated accounting information.

**11** Click **Done**.



Manage details

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

Charge to

Account Assignment \* ⓘ  
K (Cost center) ▾

Account Type  
Expense ▾

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

GL Account ⓘ  
0000571410 (NON-MOVEABLE CAPITAL ... ▾

Cost Center ⓘ  
1202020000 (BIOLOGY) ▾

Changing accounting details for specific item(s)?

**11** Done