# SRM FREE TEXT SHOPPING CARTS

University of Kentucky

AN EQUAL OPPORTUNITY UNIVERSITY

# WHAT ARE SRM FREE TEXT SHOPPING CARTS?

Used for any commodity listed in the Purchasing / AP Quick Reference Guide requiring Shopping Cart as the purchase method <u>and</u> for which there is not an e-catalog product available from the SAP Ariba Network.

After approval, Free Text carts arrive at Purchasing for manual processing and order placement with supplier.

Other examples that follow the Free Text Shopping Cart process:

- Any purchase, regardless of order value, that involves written agreements

- Commodities having special conditions or nature (e.g., personal service contracts, leases, etc.)

- Capital equipment (i.e., items > $5000 cost per item)

- Purchases for which the procurement card is not the applicable method, or the vendor does not accept the procurement card

# TRAINING REQUIREMENTS FOR SRM DEPARTMENTAL ROLES

| Role | Training Requirements |
|---|---|
| Shopper | Shoppers are required to take and pass two course modules in successive order via myUK Learning:<br><br>**SRM_SHO_305 SRM E-Catalog Shopping**<br><br>**SRM_SHO_306 SRM Free Text Shopping Carts** |
| Approver | Approvers are required to take and pass the **MM_APP_300 Combined Approvers** course via myUK Learning. |
| Goods Confirmer | Goods Confirmers are required to take and pass the **SRM_CON_300 SRM Goods Confirmations** course via myUK Learning. |

# SRM FREE TEXT SHOPPING CARTS PRE-STEPS

The first step in creating a Free Text Shopping Cart is obtaining a quote from a supplier. As the name "Free Text" implies, the Shopper enters the line items directly onto the cart via freehand rather than selecting from items from the SAP Ariba e-catalogs. The Shopper attaches the quote to the Free Text Shopping Cart during the creation process.

Free Text carts frequently, although not always, originate from suppliers holding a University Price Contract or other agreement. If needed, the Price Contracts listing can be foud on the Purchasing website at: https://purchasing.uky.edu/.

All Free Text Shopping Carts require approval regardless of dollar amount. Carts route to Purchasing after approval and are processed manually based on established protocols.

# SRM FREE TEXT SHOPPING CARTS PRE-STEPS

Before you begin to create your Free Text Shopping Cart, you must also ensure the preferred supplier exists in the Vendor Master Data and is a qualified supplier to do business with the University.

Vendor master data is managed by the Purchasing Division and new vendors are onboarded via PaymentWorks, a third-party registration and validation provider.

If you are unsure of the vendor's registration status, visit the Learning and Training Resources section of the Purchasing website for information and guidance on registration steps and processes.

# BEGIN FREE TEXT SHOPPING CART

# COMPLETE DEFAULT VALUES ON SHOPPING CART

# SET ACCOUNT ASSIGNMENT

# COMPLETE DELIVERY ADDRESS (REQUIRED)

# COMPLETE DELIVERY ADDRESS (REQUIRED)

# HEADER NOTES (OPTIONAL)



**Create Shopping Cart**

| Order | | Close | Save | Check | System Information | Create Memory Snapshot |

**Number** 9000575570 **Document Name** CLOCKE 08/15/2021 11:21 **Status** In Process **Created On** 08/15/2021 11:21:26 **Created By** Craig Locke

▼ General Data

Buy on Behalf of: 22864 Craig Locke
Name of shopping cart: CLOCKE 08/15/2021 11:21
Default Settings: Set Values
Approval Process: Display / Edit Agents
Budget: Display
Document Changes: Display
PO Type: NBPO
Period of Performance:

Approval Note
For research project CP-2021-015

**Internal and will NOT print on the purchase order.**

Note to Supplier
Lab door may be locked at point of delivery; call 869-323-8948 if needed for access

**WILL print on the purchase order to vendor.**

▼ Item Overview

| Details | Add Item ▲ | Copy | Paste | Duplicate | Delete |

| | Line Number | Description | Product Category | Product Category Description | Quantity | Unit | Net Price / Limit | Currency | Delivery Date |
|---|---|---|---|---|---|---|---|---|---|
| • | 1 | TAQMAN GENEXPRSNASSAY SMVIC | 99999999 | NTER PRODUCT CATEGO | 1 | EA | 240.00 | USD | 08/20/2021 |
| • | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| • | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| • | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| • | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |

# FREE TEXT – HAVE QUOTE AVAILABLE

## Sales Quotation

| *Quote Nbr | Creation Date | Due Date | Page |
|---|---|---|---|
| 1196-4933-61 | 07/15/2021 | | 1 of 1 |

| Payment Terms | Delivery Terms |
|---|---|
| NET 30 DAYS | DEST |

| Valid To | Prepared By |
|---|---|
| 11/12/2021 | DOIL, AARON M. |

| Customer Reference | Sales Representative |
|---|---|
| QUOTE/DURHAM/07/15/21 | MEGANN TATE |

| To place an order | Ph: 800-766-7000 | Fx: 800-926-1166 |
|---|---|---|

| Submitted To: | Customer Account: | 432440-001 |
|---|---|---|

UNIVERSITY OF KENTUCKY
FILL IN
FILL IN
LEXINGTON KY 40506

### Fisher Scientific
Part of Thermo Fisher Scientific

FISHER SCIENTIFIC COMPANY LLC
4500 TURNBERRY DRIVE
HANOVER PARK IL 60133-5491

**Review and Place Order**

Click here or go through your purchasing system to fishersci.com quotes

**\*Please reference this Quote Number on all correspondence.**

Don't have a profile? Register on        fishersci.com

For complete Terms and Conditions, please   click here.

| Nbr | Qty | UN | Catalog Number | Description | Unit Price | Extended Price |
|---|---|---|---|---|---|---|
| 1 | 1 | EA | 44 484 89 | TAQMAN GENEXPRSNASSAY SMVIC | 240.00 | 240.00 |

Applied Biosystems TaqMan Gene Expression Assay, VIC, Content And
Storage: 1 tube containing a 20X (S and M sizes) or 60X (L size) mix
of pre-formulated assay (1 probe and 2 primers).<br><br>Store at -15
to -25 deg.C.<br><br>, CTA Type: Magellan_PDP_OrderNow, Generic
Product: TaqMan Gene Expression
Vendor Catalog # 4448489
This item is being sold as   1 per each
List Price:    299.00 CDC: 050

| MERCHANDISE TOTAL | 240.00 |
|---|---|

# FREE TEXT – GENERAL ENTRIES

## Create Shopping Cart

| Order | | Close | Save | Check | System Information | Create Memory Snapshot |

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### ▼ General Data

Buy on Behalf of: 22864    Craig Locke

Name of shopping cart: CLOCKE 08/15/2021 11:21

Default Settings: Set Values

Approval Process: Display / Edit Agents

Budget: Display

Document Changes: Display

PO Type: NBPO

Period of Performance:

Approval Note

For research project CP-2021-015

Note to Supplier

Lab door may be locked at point of delivery; call 869-323-8948 if needed for access

### ▼ Item Overview

| Details | Add Item ▲ | Copy | Paste | Duplicate | Delete |

| | Line Number | Description | Product Category | Product Category Description | Quantity | Unit | Net Price / Limit | Currency | Delivery Date |
|---|---|---|---|---|---|---|---|---|---|
| ▪ | 1 | TAQMAN GENEXPRSNASSAY SMVIC | 99999999 | NTER PRODUCT CATEGO | 1 | EA | 240.00 | USD | 08/20/2021 |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD | 08/20/2021 |

# FREE TEXT – SELECT PRODUCT CATEGORY

# FREE TEXT – SELECT PRODUCT CATEGORY

**Search Product Category**

Personal Value List

Display As: Flat List ▼

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID: [_____]
Description: [*Laboratory*]
Logical System: [_____]

☑ Restrict Number of Value List Entries    500

[Start Search] [Reset]

[OK] [Cancel]

**Search Product Category**

Personal Value List

Display As: Flat List ▼

Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID: [_____]
Description: [*Laboratory*]
Logical System: [_____]

☑ Restrict Number of Value List Entries    500

[Start Search] [Reset]

**Search Result**

| Description | Category ID | Logical System |
|---|---|---|
| Animal -  Laboratory | 10100000 | R3PCLNT300 |
| Laboratory Equip | 41100000 | R3PCLNT300 |
| Laboratory Supp&Acc | 41101500 | R3PCLNT300 |

[OK] [Cancel]

**TIP:** Alternatively, you can leave search term blank and click Start Search for a full listing of product categories.

# FREE TEXT – COMPLETE REMAINING LINES

# FREE TEXT – ENTER SUPPLIER PRODUCT NUMBER(S)
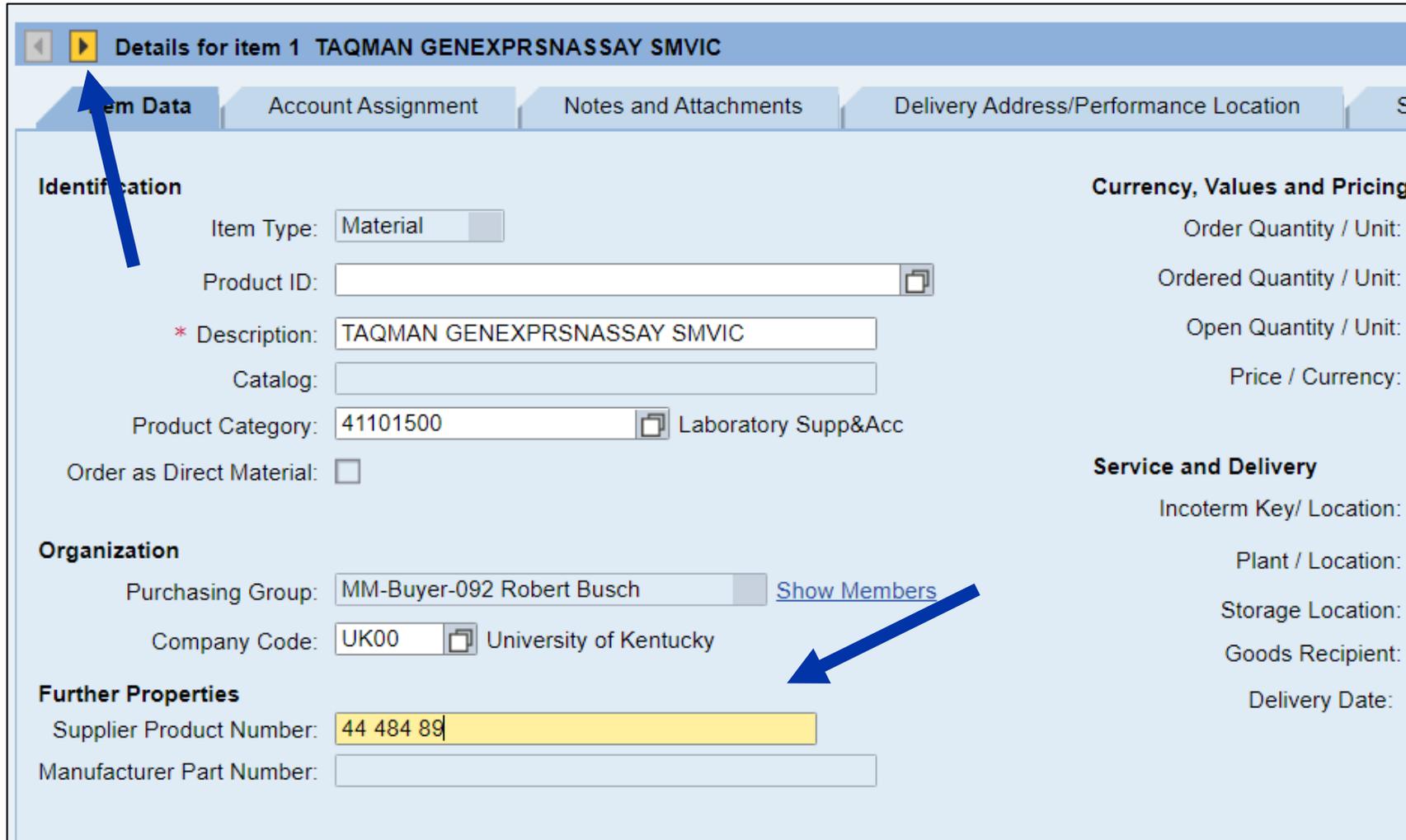
# FREE TEXT – GL ACCOUNT

**TIP:** The General Ledger (GL) Account is an accounting component that relates to the description of the goods or services purchased.



**Details for item 1  TAQMAN GENEXPRSNASSAY SMVIC**

| Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sources of Supply / Service Agents | Approval Process Overview |

You can see who bears the costs and, if necessary, you can distribute the cost to several cost centres

**Cost Distribution** Percentage ▼ | Details | Add Line | Copy | Paste | Duplicate | Delete | Split Distribution | Change All Items

| Number | Accounting Line Number | Percentage | Account Assignment Category | Assign Number | Account Assignment Description | General Ledger Account | General Ledger Description |
|--------|----------------------|-----------|----------------------------|---------------|-------------------------------|----------------------|---------------------------|
| 0001 | | 100.00 | Cost Center ▼ | 1012027461 | | 540311 | Chemicals&Lab Supply |

**Clipboard**

**Note:** If ordering a single item that is over $5000, a capital equipment GL must be assigned to that line item. A capital GL is prefixed with 55XXXX and can be selected from within the search function

# FREE TEXT – LINE-ITEM NOTES

# FREE TEXT – ADD ATTACHMENTS



**TIP:** For Shopping Carts with multiple line items, the quote only needs attached to Line Item 1.

# FREE TEXT – ADD ATTACHMENTS

# FREE TEXT – ADD ATTACHMENT(S)
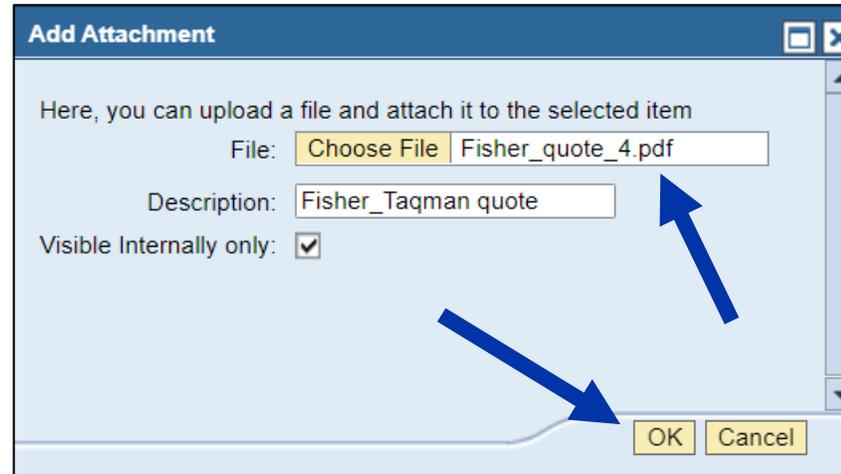
# FREE TEXT – SET PREFERRED SUPPLIER

# FREE TEXT PREFERRED SUPPLIER SEARCH

# FREE TEXT – PREFERRED SUPPLIER SEARCH

**Search: Preferred Supplier**

**Search Criteria**                                          Hide Search Criteria

Further Search Helps: | Supplier ▼ |

| Name 1 ▼ | is ▼ | *FISHER*SCI* | ⊕ ⊖ |
| Name 2 ▼ | is ▼ | | ⊕ ⊖ |
| Vendor ▼ | is ▼ | | ⊕ ⊖ |
| Street ▼ | is ▼ | | ⊕ ⊖ |

☑ Maximum Number of Results: [ 500 ]

[ Search ]  [ Clear Entries ]  [ Reset to Default ]

**Results List: 8 results found for Preferred Supplier**

| Vendor ⬆ | Name | Name 2 | C... | House ... | Street | City | Region | Postal Code | B... |
|---|---|---|---|---|---|---|---|---|---|
| 119652 | Fisher Scientific Company | | US | | Turnberry Dr | Hanover Park | IL | 60133 | |
| 129305 | Fisher Scientific | | US | | | Atlanta | GA | 30384-4705 | |
| 135243 | Thermo Fisher Scientific (Asheville)... | (Formerly Thermo El... | US | | Schenck Pkwy Ste 400 Bu... | Asheville | NC | 28803 | |
| 171345 | Thermo Fisher Scientific | | US | | 18th St | Two Rivers | WI | 54241 | |
| 396214 | Thermo Fisher Scientific | Thermo Electron Nor... | US | | Northpoint Pkwy Ste 10 | West Palm Beach | FL | 33407 | |
| 396215 | Thermo Fisher Scientific | Thermo Electron Nor... | US | | | Atlanta | GA | 30374-2775 | |

# FREE TEXT – PREFERRED SUPPLIER SEARCH

# FREE TEXT – CHECK AND ORDER



**Create Shopping Cart**

| Order | | Close | Save | Check | System Information | Create Memory Snapshot |

☑ Shopping cart 9000575570 has no errors

**Number** 9000575570   **Document Name** CLOCKE 08/15/2021 11:21   **Status** In Process   **Created On** 08/15/2021 11:21:26   **Created By** Craig Locke

▼ General Data

Buy on Behalf of: `22864`   Craig Locke
Name of shopping cart: `CLOCKE 08/15/2021 11:21`
Default Settings: Set Values
Approval Process: Display / Edit Agents
Budget: Display
Document Changes: Display
PO Type: `NBPO`
Period of Performance: `_____` `_____`

**Note:** Only click the SAVE button if the order is to be placed on HOLD and finished later. A Saved Shopping Cart resides in the Shopper's dashboard and does not move forward to the Approver.

▼ Item Overview

| Details | Add Item ▾ | Copy | Paste | Duplicate | Delete |

| | Line Number | Description | Product Category | Product Category Description | Quantity | Unit | Net Price / Limit | Currency |
|---|---|---|---|---|---|---|---|---|
| ▪ | 1 | TAQMAN GENEXPRSNASSAY SMVIC | 41101500 | Laboratory Supp&Acc | 1 | EA | 240.00 | USD |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD |
| ▪ | | | 99999999 | ENTER PRODUCT CATEGO | 1.000 | | 0.00 | USD |

# FREE TEXT SHOPPING CART CHECKLIST

| Item | Task | Check |
|:---:|:---|:---:|
| 1 | Obtain vendor quote | ✔ |
| 2 | Ensure vendor registered and has a vendor number | ✔ |
| 3 | Set Account Assignment within Set Values | ✔ |
| 4 | Complete c/o, room, and floor for Delivery Address | ✔ |
| 5 | Insert header notes (optional) | ✔ |
| 6 | Enter product description, quantity, unit, price, delivery date | ✔ |
| 7 | Select product category | ✔ |
| 8 | Enter vendor catalog number(s) | ✔ |
| 9 | Check / confirm GL Account | ✔ |
| 10 | Add notes (optional) and quote attachment (required) | ✔ |
| 11 | Select/set vendor number | ✔ |
| 12 | Check for errors and ORDER | ✔ |

# SPECIAL NOTES ON SRM FREE TEXT SHOPPING CARTS

- All Free Text Shopping Carts, regardless of value, process through departmental approver workflow(s) and then onward to Purchasing for order processing and placement with the suppliers.

- Goods Confirmations are required for all purchase orders resulting from Free Text Shopping Carts

- Email notifications are provided to Shoppers as orders are placed with suppliers as well as notifications when invoice(s) are received and posted.

# RESOURCES

- Help guide and quick reference guides are maintained on the Purchasing website at https://purchasing.uky.edu/

- Communications to be provided via website and listserv as additional suppliers are added, etc.

- Retake Shopper training, if desired, any time through myUK Learning as refresher; Training Request Plan is not required to retake a course

# RESOURCES

- Use [SRMHelp@uky.edu](mailto:SRMHelp@uky.edu) for technical assistance with any SRM Shopping Cart need or inquiry

    - Include message or screenshot
    - Put SRM Shopping Cart on SAVED status if possible and provide cart number

- Shoppers can also email for information to subscribe to the Purchasing listserv

# CONGRATULATIONS!

**YOU HAVE COMPLETED THE COURSE,
SRM_SHO_306 SRM FREE TEXT SHOPPING**

**PLEASE CLOSE THIS BROWSER WINDOW TO RECEIVE CREDIT.**

University of Kentucky

AN EQUAL OPPORTUNITY UNIVERSITY