Purchasing Method – Shopping Carts

Introduction:
- Shopping carts are the preferred method for goods and services.
- Dual department collaboration – Shopping carts are processed by Sourcing and payment is processed through Accounts Payable.
- If you are new to the University check to see if you have the procurement tab; if not, contact your DSA (Department Security Administrator) Maria Anderson (mbda@bu.edu).
- Take a shopping cart training class if you have not done so already;
  See IS&T for training and upcoming classes: http://www.bu.edu/sourcing/2012/10/10/shopping-cart-training/. Please meet with Carol DeSimone (ccullati@bu.edu) for Shopping Cart training.

Shopping Cart Tips and Requirements:
- Set up your personalization. Most of you have done this during your shopping cart training at IS&T. http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/personalization.htm
- Name your shopping cart. Put in the vendor name and a brief description. For example: Proforma/Gift for Guest Speaker. In this example, Proforma is the vendor.
- If you are ordering from a discretionary account, grant, or gift account make sure you select the correct "account assignment category". For discretionary accounts, grants, or gift accounts pull down "order" from the account assignment category. You will get an error message if you use cost center for the above.
- Periodically check your work using the check button. By checking your work you can see if there are any errors that need to be addressed. If there is an error you will see a red flag. Ignore any yellow flags. This is just a warning. Save your work before you exit or if you have been in the system for a while. Once you save your shopping cart you will need to use the edit button to add or make changes.
- When searching for a supplier, go to the tab "sources of supply". Under supplier, click on the box to the left of assigned supplier.   You can do a search for the vendor by putting an * before and after part of vendor name in the section Name 1/last name and name 2/first name. An example for the company Proforma go under the heading 1/last name and type *Proform*. Click on start search and when the supplier comes up highlight the supplier and click ok and it will bring you to the screen where you will actually need to **assign the supplier.** If you do *not* click on assign supplier, a supplier will not be added to your shopping cart.
- Here are some instructions for editing a shopping cart or pulling back a shopping cart before it has been approved: http://vpfa-server18.bu.edu/helpconsole/BU%-to-Pay%20Guide/Static/How_Do_I_Edit_My_Shopping_Cart.htm
- Here are instructions on deleting a shopping cart: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/How_Do_I_Edit_My_Shopping_Cart.htm. By deleting a shopping cart you are also removing a commitment on your budget.
- The description section of the shopping cart should have the item you are ordering and avoid using the vendor name in this section. The vendor information is put in the shopping cart name. An example for a description would be if you were ordering from the company Proforma that sells BU promotional items. You would type in "red totes" as an example for the description. If there are different items you are ordering use a new line for the each item. It is important to use quantity and unit price whenever you can, especially for auditing purposes.

- If you have multiple lines on an invoice or quote include all lines (even the shipping) in your cart. Once you complete line 1 and have included account assignment, GL, and supplier information you can duplicate the remaining lines by using the duplicate button. The GL for shipping can be the same as the other items. Just remember to go in and change the description and amount for each line when duplicating a line.
- You can also copy a shopping cart using the copy button. Just remember to change dates, attachments, etc.
- Always check the GL code. You can manually change this. The GL will automatically link to the product category. Sometimes it is not always the best fit. Since the GL will show up on your budget you will want to be consistent with your choice of using GL's in order to keep an efficient tracking system.
- An invoice or quote can be added as an attachment. You should also fill in internal notes or supplier notes. If you put in supplier notes this will show up on the printout of your shopping cart which can be helpful.
- Check on display edit agents located below the shopping cart name to see the persons' queue the shopping cart is in. If a shopping cart needs prompt attention you can e-mail the buyer to see if they can expedite the process.
- Invoices over $5K will initiate a payment block in the system. You will receive a notice from BU works to release the block. Only approvers have access to release a $5K block. Go to your work list and you will see a shopper decision form. You can click on manager substitution and follow the instructions below to set up the Admin group as a manager substitute. Include all approvers so if one of us is out another person can approve it. The list should include Marissa Paeglow (mpaeglow), Carol DeSimone (ccullati) and Julie Cordeiro (juliec) as approvers. More information on how to set up a substitution can be found here: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/substitution.htm. By setting up a manager substitution you will no longer receive shopper decision forms. They will get routed to the Admin department and we can approve them.
- The e-mail you receive regarding the payment block will have the payment due date. By releasing the invoice, payment will not necessarily go out at that time. The vendor has set terms and you will see a payment due date in the e-mail. If an invoice is time sensitive and needs to be released sooner please contact Carol and she can look into getting the payment expedited.

Shopping Cart Flow and Obtaining a Purchase Order:
- Once the shopping cart has been ordered successfully and you receive a shopping cart number your cart will get routed to SMG Administration or Sourcing for approval. If the vendor is not assigned or because of the amount of the shopping cart Sourcing will receive it first. When the shopping cart has been fully approved you will receive an e-mail with purchase order # from BU Works. You can also check the PO # by going to the tab "related documents", located below the shopping cart number the PO # begins with an 8. http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/where_did_the_po_go_.htm
- In order to process the invoice, write the PO # on the invoice and scan it and e-mail it to invoices@bu.edu. Include in your subject line the vendor name and PO #.
- An invoice will not be paid until an invoice is sent to invoices@bu.edu

Ask yourself a few questions before doing a Shopping Cart:
- Is the vendor a registered vendor? Check the supplier list if you do not know: http://www.bu.edu/sourcing/shoppers_guide/buworks-suppliers/
- If the vendor is registered, then what type of shopping cart should I do?
    - Types of Shopping Carts:
        1. Free description - used when purchasing items that you type in a description, not through a catalogue. Examples of this would be promotional items such as plaques, mugs, etc. http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/with_free_description_-_new_supplier.htm

        2. Limit Item - used when purchasing a variable or set amount of services and the services can be for an extended period of time.
            - Limit items are recommended for contracted services, consultants and freelancers that services have not already been performed. An example of this would be if you were using a consultant for the fiscal year. After estimating the cost of their services you would submit a limit order shopping cart. The purchase order you receive can be used against several invoices until the funds are used up. If the funds are used up or the purchase order amount is less than the invoice amount you can contact the buyer at Sourcing to increase the limit on your shopping cart. Once increased, you can scan your invoice to Accounts Payable at invoices@bu.edu and payment will be processed.
            - Any services over $25K will need a quote attached; for services over $25K a sole source justification or competitive bid is necessary.
            - More information regarding competitive bidding can be found here: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/competitive_bidding.htm
            - More information regarding sole source justification for non-competition can be found here: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/non-competition.htm
            - Since the supplier information is not assigned on a limit order the cart automatically gets routed to Sourcing once ordered. Sourcing will assign the supplier. Therefore, it is important to include all contact information in the notes regarding vendor information. This way they can get in touch with the vendor and register them
            - Complete instructions on how to create a Limit Order shopping cart: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/limit_order_.htm

        3. Terrier Marketplace
            - Terrier Marketplace (most commonly used is Office Depot) – shopping carts that have catalogues (most often used to order office supplies).
            - When placing Office Depot orders set your default value settings. Under the default settings follow the tab to delivery and include your name, room and floor #.
            - More information on how to create a Terrier Marketplace shopping cart: http://vpfa-server18.bu.edu/helpconsole/BU%20Procure-to-Pay%20Guide/Static/terrier_marketplace_catalog_.htm