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| **Process:** Items from Fisher Scientific can be ordered two ways within the Supplier Relationship Management (SRM) e-procurement system:  1. The Fisher Scientific e-catalog is available for those holding the Shopper role. It is accessible via the Add-Item dropdown menu along with other e-catalogs. It contains products that are ***exclusive*** to Fisher Scientific (e.g., Fisherbrand, Thermo Scientific, Invitrogen, Life Technologies, etc.) and not available from VWR International. Quotes are not needed for e-catalog orders; Shoppers simply locate Fisher exclusive items from within the catalog, place into their Shopping Cart, and checkout/order.  2. If needed, departments may purchase products from Fisher Scientific beyond the exclusive items in the e-catalog by using the SRM Free Text Shopping Cart option. A quote must be acquired from a Fisher sales rep or other source. The shopper manually enters the line item information into the Free Text Cart. As a refresher, the below steps reflect the Free Text Cart entry process specifically for Fisher Scientific. If needed, additional help materials are available on the Purchasing website at: <http://www.uky.edu/Purchasing/SRM.htm>.  When working with a Fisher prepared quote, please ensure the items cannot be ordered from within the e-catalog prior to creating a Free Text cart. The e-catalog should be utilized for ordering items whenever possible.  Please create Free Text Shopping Carts separately from items ordered through an e-catalog Shopping Cart. | |
| **Role:** SRM Shoppers | **Frequency:** As needed |

**Refresher/Quick Reference:**

**How to Create Free Text Shopping Cart**

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| **Reminder: This is for Free Text Shopping Carts only, for items that are not available from the Fisher Scientific e-catalog.**  1. The department obtains quote from a Fisher sales representative. |  |
| 2. Access the Shopper tab within myUK |  |
| 3. Click Shopping Cart under the Navigation panel on the left side |  |
| 4. Click Create Documents – Shopping Cart |  |
| 5. Click Set Values under Default Settings in the header section of the cart |  |
| 6. Select the correct Account Assignment Category and set the corresponding number.   * Select Cost Center as category if account number begins with 1 * Select WBS Element as category if account number begins with 2 or 3 |  |
| 7. Select Delivery Address tab. Enter c/o name, room, and floor number for person receiving delivery of items.  Click OK |  |
| 8. Place quote number in the Note to Supplier text box |  |
| 9. Items for Free Text orders are entered via freehand. They are not selected from an e-catalog within the Add Item menu.  Enter the item description, quantity, unit, and per each price from the quote, and required delivery date. |  |
| 10. For laboratory/scientific purchases only, enter product category 41100000. |  |
| 11. If multiple items are being ordered, repeat steps for other line items.  When finished, click Details button to open the bottom section. |  |
| 12. On the Item Data tab, enter the Supplier Product Number (i.e., catalog number) for each line item |  |
| 13. Review and check the Account Assignment tab on the line item level. Shopper can overwrite the GL Account as needed.  Reminder: If a piece of equipment is over $5000, it requires a capital GL. 550030 is the most common capital GL for laboratory equipment. |  |
| 14. The quote must be attached to the Shopping Cart.  Click Notes and Attachments tab in bottom Details section  Click Add Attachment |  |
| 15. Click Browse |  |
| 16. Locate and select the quote attachment to add.  Click Open |  |
| 17. Name the attachment  Click OK |  |
| 18. Click the Sources of Supply Tab to set the supplier number.  For Fisher Scientific only, enter 119652 into the Preferred Supplier box.  Reminder: If there are multiple line items, the supplier number must be replicated on each line. |  |
| 19. Click Order to finish the Shopping Cart. All Free Text carts move to departmental approver(s) and onto Purchasing for processing. |  |