

SRM FREE TEXT SHOPPING CARTS





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 and 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: SRM_SHO_305 SRM E-Catalog Shopping SRM_SHO_306 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 found 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

The screenshot displays the myUK Shopper interface. The top navigation bar includes tabs for Launch Pad, Employee Self Service, Enterprise Services, my UK, Shopper, Confirmations, Purchasing Admin, SRM System Admin, and Strategic Procurement. The Shopper tab is active. On the left, a navigation menu is expanded to show 'Shopping Cart' under 'Detailed Navigation' and 'Shopping Cart' under 'Create Documents'. The main content area shows 'Active Queries' with links for Shopping Carts, Purchase Orders, and Confirmations. Below this is the 'Shopping Carts - All' section with search filters for Shopping Cart Number, Name, Description, Timeframe (set to Last 30 Days), and Creation Date.

myUK

Launch Pad | Employee Self Service | Enterprise Services | my UK | **Shopper** | Confirmations | Purchasing Admin | SRM System Admin | Strategic Procurement

Shopper

Shopping Cart

Detailed Navigation

- Inbox
- Shopping Cart**
- Settings
- Display Purchase Order

Services

- Advanced Search
- Create Documents**
 - Shopping Cart

Related Links

- Shopping Cart Report
- Business Analysis Report
- Shopping Cart Approval Report

Active Queries

Shopping Carts [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Team Carts \(0\)](#)

Purchase Orders [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Rejected \(0\)](#) [Ordered \(0\)](#) [Confirmations pending \(0\)](#)

Confirmations [All \(0\)](#) [Saved \(0\)](#) [Awaiting Approval \(0\)](#) [Approved \(0\)](#) [Rejected \(0\)](#) [Deleted \(0\)](#) [Confirmations for Team Carts \(0\)](#)

Shopping Carts - All

Hide Quick Criteria Maintenance

Shopping Cart Number: To

Shopping Cart Name:

Item Description:

Timeframe: Last 30 Days

Creation Date: To


COMPLETE DEFAULT VALUES ON SHOPPING CART

Create Shopping Cart


[Order](#) | [Close](#) [Save](#) [Check](#) [System Information](#) [Create Memory Snapshot](#)

Number 9200568759 Document Name DRBACK00 08/10/2021 09:45 Status In Process Created On 08/10/2021 09:45:22 Created By I

▼ General Data


Buy on Behalf of: 20752  Ms. Donna Back



Name of shopping cart: DRBACK00 08/10/2021 09:45

Default Settings: [Set Values](#) 

Approval Process: [Display / Edit Agents](#)

Document Changes: [Display](#)


PO Type: NBPO 

Period of Performance:  

Approval Note

Note to Supplier

▼ Item Overview

[Details](#) [Add Item](#)  [Copy](#) [Paste](#) [Duplicate](#) [Delete](#)

Line Number	Item Type	Product ID	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Cur
▪	Undefined Item Type			99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD
▪	Undefined Item Type			99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD
▪	Undefined Item Type			99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD
▪	Undefined Item Type			99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD

SET ACCOUNT ASSIGNMENT

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data | **Account Assignment** | Internal Note | Delivery Address / Performance Location

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 Duplicate Delete Split Distribution Settings

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	Assignment Number	General Ledger Account	General Ledger Description	Business Area	Unfunded Accounting Line
0001		100.00	WBS element							

Cost Center
Fund
Order
WBS element

OK

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data | **Account Assignment** | Internal Note | Delivery Address / Performance Location

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 Duplicate Delete Split Distribution

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	Assignment Number	General Ledger
0001		100.00	WBS element	3048115048			

COMPLETE DELIVERY ADDRESS (REQUIRED)

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data | Account Assignment | Internal Note | **Delivery Address / Performance Location**

Reset

If the item is to be delivered to a different address, enter the new address here

Name:	<input type="text" value="UK"/>		Additional Name:	<input type="text" value="University of Kentucky"/>	
* Building Name / Code:	<input type="text" value="Patterson Office Tower"/>	<input type="text" value="0027"/>	Phone Number / Extension:	<input type="text"/>	
* C/O:	<input type="text"/>		E-Mail:	<input type="text"/>	
Fax Number/Extension:	<input type="text"/>		* Floor / Room:	<input type="text"/>	<input type="text"/>
Street / House Number:	<input type="text" value="120 Patterson Dr"/>	<input type="text"/>	Postal Code / City:	<input type="text" value="40506-0027"/>	<input type="text" value="Lexington"/>
District:	<input type="text"/>		Postal Code / P.O.Box:	<input type="text"/>	<input type="text"/>
Country:	<input type="text" value="US"/>	<input type="checkbox"/> USA	Region:	<input type="text" value="KY"/>	<input type="checkbox"/> Kentucky

OK

COMPLETE DELIVERY ADDRESS (REQUIRED)

Change Default Settings

Your data will be transferred to all new items. Items already in the shopping cart will be unchanged.

Item Basic Data | Account Assignment | Internal Note | **Delivery Address / Performance Location**

Reset

If the item is to be delivered to a different address, enter the new address here

Name:	<input type="text" value="UK"/>	<input type="button" value=""/>	
* Building Name / Code:	<input type="text" value="Patterson Office Tower"/>	<input type="text" value="0027"/>	
* C/O:	<input type="text" value="Suzy Customer"/>		
Fax Number/Extension:	<input type="text" value="859-257-1951"/>		
Street / House Number:	<input type="text" value="120 Patterson Dr"/>		
District:	<input type="text"/>		
Country:	<input type="text" value="US"/>	<input type="button" value=""/>	USA
Additional Name:	<input type="text" value="University of Kentucky"/>		
Phone Number / Extension:	<input type="text"/>		
E-Mail:	<input type="text"/>		
* Floor / Room:	<input type="text" value="4"/>	<input type="text" value="421"/>	
Postal Code / City:	<input type="text" value="40506"/>	<input type="text" value="Lexington"/>	
Postal Code / P.O.Box:	<input type="text"/>	<input type="text"/>	
Region:	<input type="text" value="KY"/>	<input type="button" value=""/>	Kentucky

OK

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: Craig Locke
Name of shopping cart:
Default Settings: [Set Values](#)
Approval Process: [Display / Edit Agents](#)
Budget: [Display](#)
Document Changes: [Display](#)
PO Type:
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

Internal and will NOT print on the purchase order.

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	ENTER 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 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). Store at -15 to -25 deg.C. 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	240.00	240.00
MERCHANDISE TOTAL						240.00

FREE TEXT – GENERAL ENTRIES

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

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 GENEXPRS NASSAY SMVIC	99999999	ENTER 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

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: Craig Locke Approval Note
Name of shopping cart: For research project CP-2021-015
Default Settings: [Set Values](#)
Approval Process: [Display / Edit Agents](#)
Budget: [Display](#)
Document Changes: [Display](#)
PO Type:
Period of Performance:

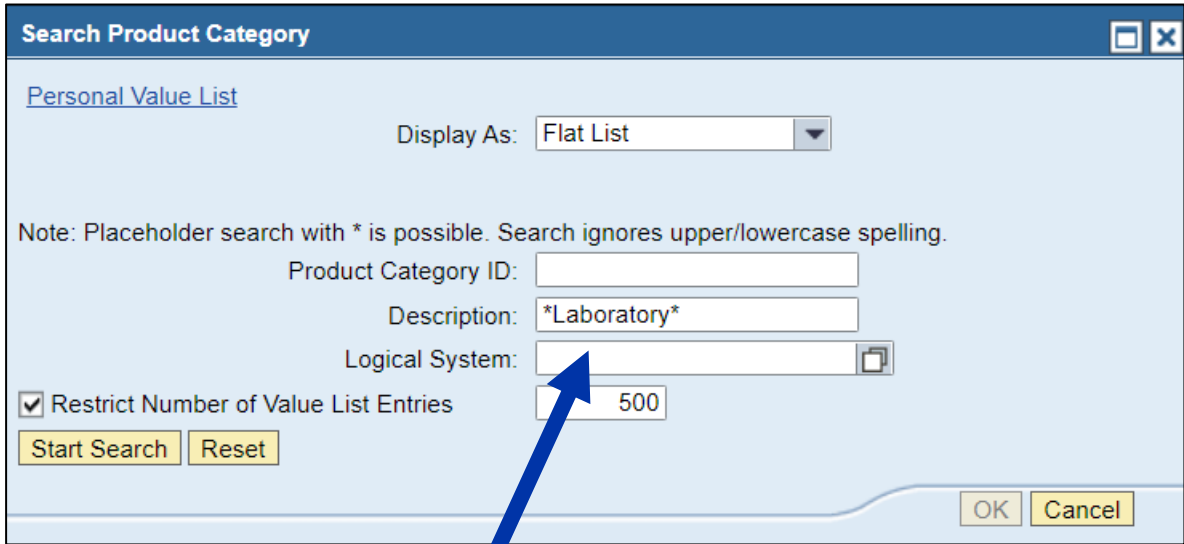
Note to Supplier
Lab door may be locked at point of delivery; call 869-323-8948 if needed for access

▼ 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	<input type="button" value="📄"/> ENTER 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



Search Product Category

Personal Value List

Display As: Flat List

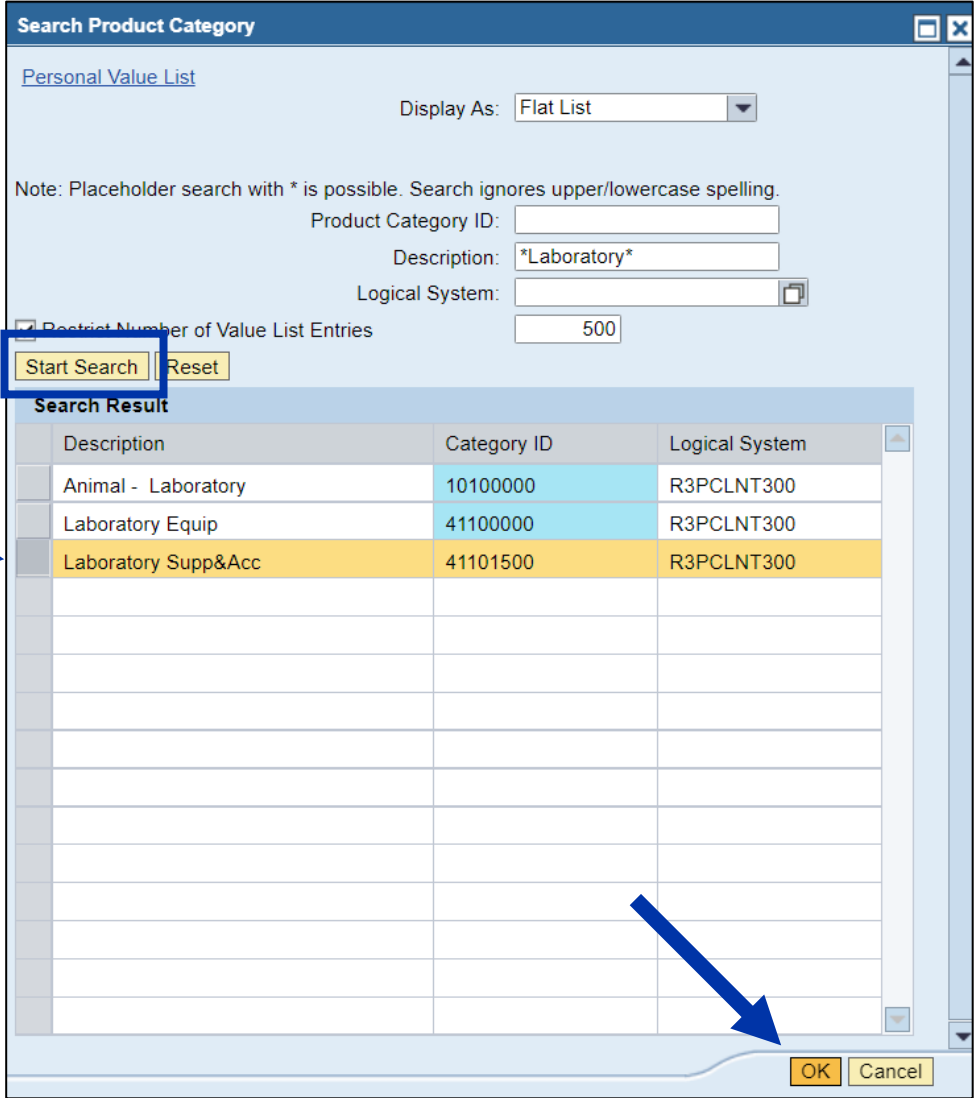
Note: Placeholder search with * is possible. Search ignores upper/lowercase spelling.

Product Category ID:

Description:

Logical System:

Restrict Number of Value List Entries



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:

Logical System:

Restrict Number of Value List Entries

Search Result

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

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

FREE TEXT – COMPLETE REMAINING LINES

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: Craig Locke Approval Note
Name of shopping cart:
Default Settings: [Set Values](#)
Approval Process: [Display / Edit Agents](#)
Budget: [Display](#)
Document Changes: [Display](#)
PO Type:
Period of Performance:

Note to Supplier

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	41101500	Laboratory Supp&Acc	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
•		99999999	ENTER PRODUCT CATEGO	1.000		0.00	USD	08/20/2021



FREE TEXT – ENTER SUPPLIER PRODUCT NUMBER(S)

Details for item 1 TAQMAN GENEXPRSNASSAY SMVIC

Item Data | Account Assignment | Notes and Attachments | Delivery Address/Performance Location | Sc

Identification

Item Type: Material

Product ID:

* Description: TAQMAN GENEXPRSNASSAY SMVIC

Catalog:

Product Category: 41101500 Laboratory Supp&Acc

Order as Direct Material:

Organization

Purchasing Group: MM-Buyer-092 Robert Busch [Show Members](#)

Company Code: UK00 University of Kentucky

Further Properties

Supplier Product Number: 44 484 89

Manufacturer Part Number:

Currency, Values and Pricing

Order Quantity / Unit:

Ordered Quantity / Unit:

Open Quantity / Unit:

Price / Currency:

Service and Delivery

Incoterm Key/ Location:

Plant / Location:

Storage Location:

Goods Recipient:

Delivery Date:

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 55XXXXX and can be selected from within the search function.

FREE TEXT – LINE-ITEM NOTES

Details for item 1 TAQMAN GENEXPRSNASSAY SMVIC

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

▼ Notes

Clear

Category	Description
Delivery text	-Empty-
	-Empty-
Item Text	Storage: 1 tube containing a 20X (S and M sizes) or 60X (L size) mix of pre-form
Internal Note	-Empty-
Supplier text	-Empty-

▼ Attachments

Add Attachment | Edit Description | Versioning ▾ | Delete | Create Profile | Filter Settings

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Changed by	Changed on
i The table does not contain any data										

FREE TEXT – ADD ATTACHMENTS

Details for item 1 TAQMAN GENEXPRSNASSAY SMVIC

Item Data Account Assignment **Notes and Attachments** Delivery Address/Performance Location

Notes

Clear

Category	Description
Delivery text	-Empty-
Item Text	Storage: 1 tube containing a 20X (S
Internal Note	-Empty-
Supplier text	-Empty-

Attachments

Add Attachment Edit Description Versioning Delete Create Profile

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)	Cha
The table does not contain any data									

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

Add Attachment

Here, you can upload a file and attach it to the selected item

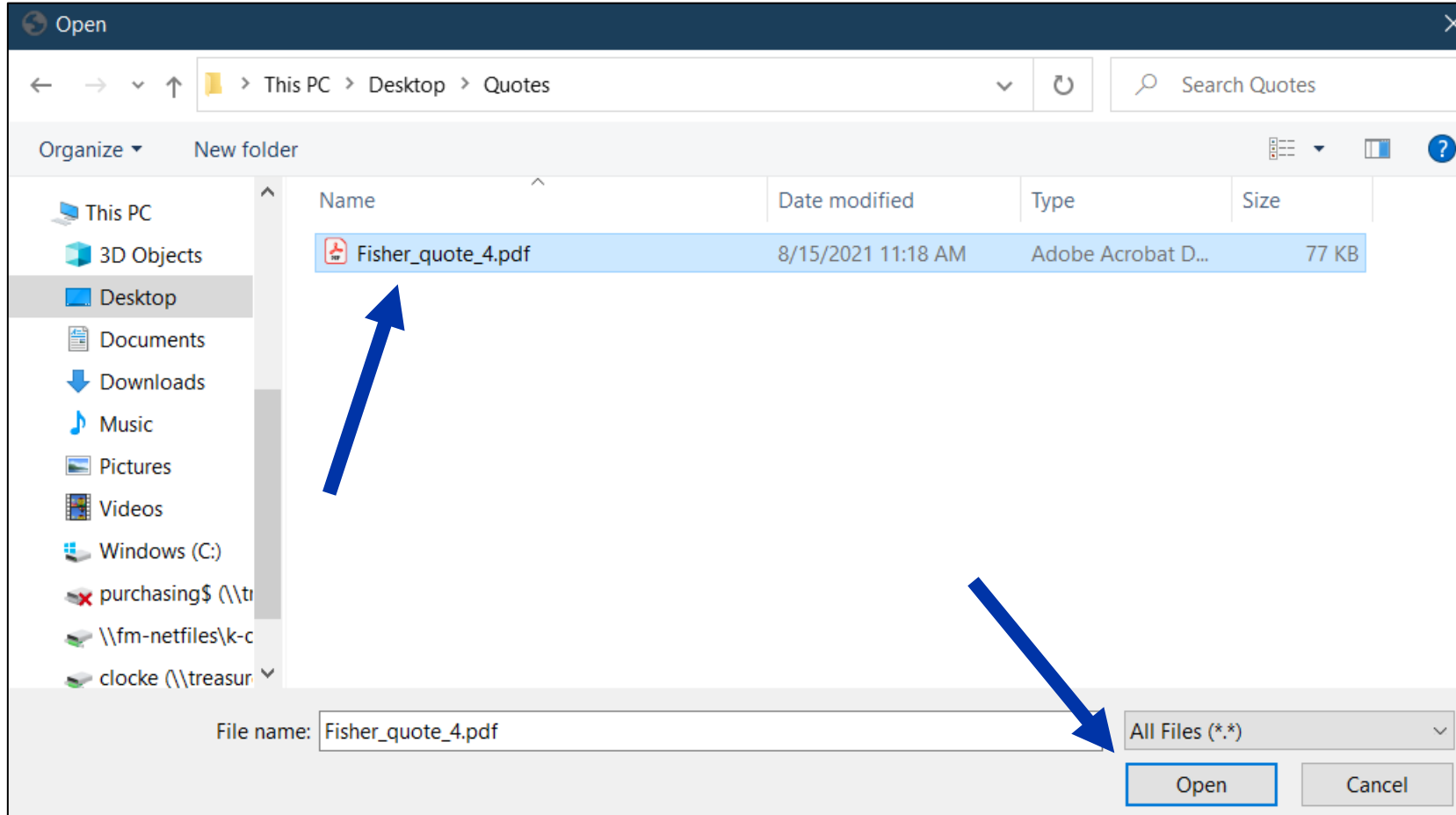
File: Choose File No file chosen

Description:

Visible Internally only:

OK Cancel

FREE TEXT – ADD ATTACHMENTS



FREE TEXT – ADD ATTACHMENT(S)

Add Attachment

Here, you can upload a file and attach it to the selected item

File: Fisher_quote_4.pdf

Description:

Visible Internally only:

▼ Attachments

Category	Description	File Name	Version	Processor	Visible Internally only	Checked Out	Type	Size (KB)
Standard Attachment	Fisher_Taqman quote	Fisher_quote_4.pdf	1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	pdf	77

FREE TEXT – SET PREFERRED SUPPLIER

Details for item 1 TAQMAN GENEXPRSNASSAY SMVIC

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

No supplier has been assigned; select and assign one of the following sources of supply
No possible sources of supply found in the system

Sources of Supply

Assign Supplier | Compare Suppliers

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:

Supplier:

Important: If your cart has multiple line items, the supplier number will need entered on each line.

FREE TEXT PREFERRED SUPPLIER SEARCH


Search: Preferred Supplier

Search Criteria

Further Search Helps:

<input type="text" value="Name 1"/>	<input type="text" value="is"/>	<input type="text" value="*Fisher*Sci*"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Name 2"/>	<input type="text" value="is"/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Vendor"/>	<input type="text" value="is"/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Street"/>	<input type="text" value="is"/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Maximum Number of Results:



FREE TEXT – PREFERRED SUPPLIER SEARCH

Search: Preferred Supplier

Search Criteria Hide Search Criteria

Further Search Helps:

Name 1

Name 2

Vendor

Street

Maximum Number of Results:

Results List: 8 results found for Preferred Supplier

Vendor	Name	Name 2	C...	House	Street	City	Region	Postal Code	S...
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

Details for item 1 TAQMAN GENEXPRSNASSAY SMVIC

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


No supplier has been assigned; select and assign one of the following sources of supply
No possible sources of supply found in the system

Sources of Supply

Assign Supplier | Compare Suppliers

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Cur

You may suggest a preferred supplier to the purchasing department

Preferred Supplier:  Fisher Scientific Company Supplier Master Record: [Display](#)

Supplier:

Remember: Be sure to repeat the Preferred Supplier number on each line item. The supplier number can be entered manually for each additional line.

FREE TEXT – CHECK AND ORDER

Create Shopping Cart

|

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: Craig Locke

Name of shopping cart:

Default Settings: [Set Values](#)

Approval Process: [Display / Edit Agents](#)

Budget: [Display](#)

Document Changes: [Display](#)

PO Type:

Period of Performance:

▼ **Item Overview**

Line Number	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency
▪ 1	TAQMAN GENEXPRS NASSAY 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

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.



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 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

Completion of SRM Free Text Shopping

This completes module SRM_SHO_306 SRM Free Text Shopping course. After completing the Check for Understanding, you will have completed both courses required to qualify for the SRM Shopper role and tab in myUK.

Remember, both modules must be completed and passed in succession to receive the SRM Shopper role:

SRM_SHO_305 SRM E-Catalog Shopping and
SRM_SHO_306 Free Text Shopping Carts



Printing Course Manual (Optional)

If desired, a printable (Adobe PDF) version of this course manual is available for your convenience.

To access and print the manual:

1. Click on the printer (the manual will open in a separate browser window)
2. Print the course manual
3. Close the separate browser window
4. Return to this course window
5. Click on the Next button below



To proceed without printing, click on the Next button below.



Check for Understanding

In order to receive full credit for this SRM Shoppers course, you must now successfully complete the Check for Understanding – a quiz covering the main concepts presented in this course.



CONGRATULATIONS!

YOU HAVE COMPLETED THE COURSE,
SRM_SHO_306 SRM FREE TEXT SHOPPING

PLEASE CLOSE THIS BROWSER WINDOW TO RECEIVE CREDIT.

