FREE TEXT CARTS

A Free Text cart is used for any commodity requiring a shopping cart as the purchase method for which there is not an E-catalog available from the SAP Ariba network.

| **Role:** Staff	**Frequency:** As Needed

Creating a Free Text Cart

1. 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

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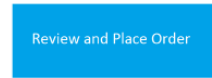
Click here or go through your purchasing system to fishersci.com quotes

*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).

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

|		
MERCHANDISE TOTAL		240.00

2. From the Shopper tab and dashboard, click **Shopping Cart** at the top of the left navigation link.

3. Click the **Shopping Cart** link under the Create Documents section.
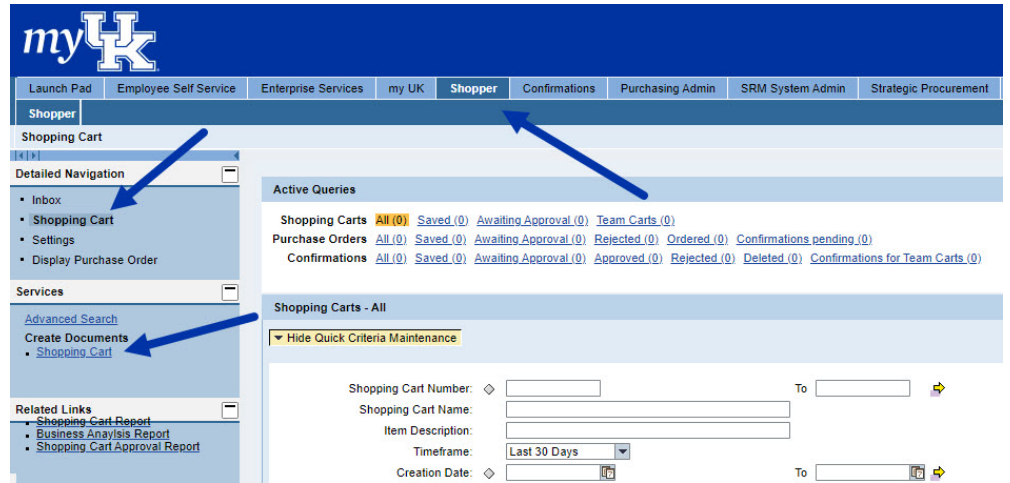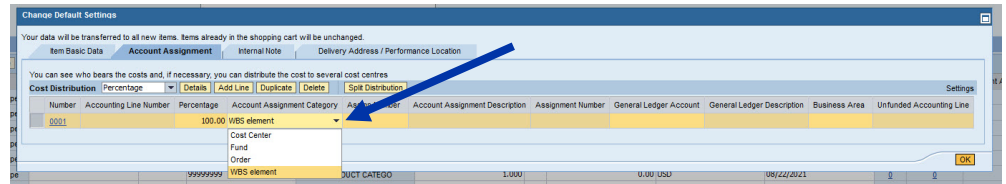

4. Before you order, you will need to complete the Delivery Address and set the Account Assignment. Entering values here will prevent you from having to enter the information line by line later.
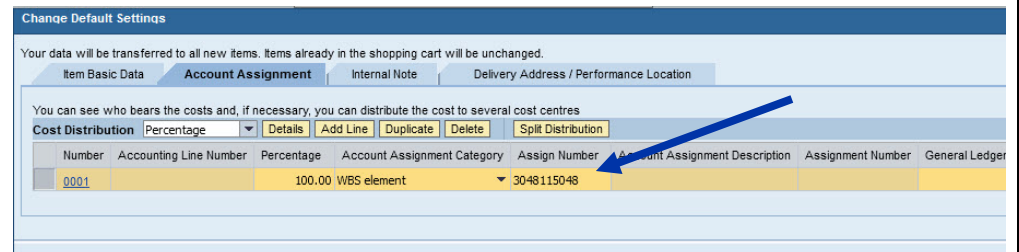Click on **Set Values** found in the top header portion of the cart.
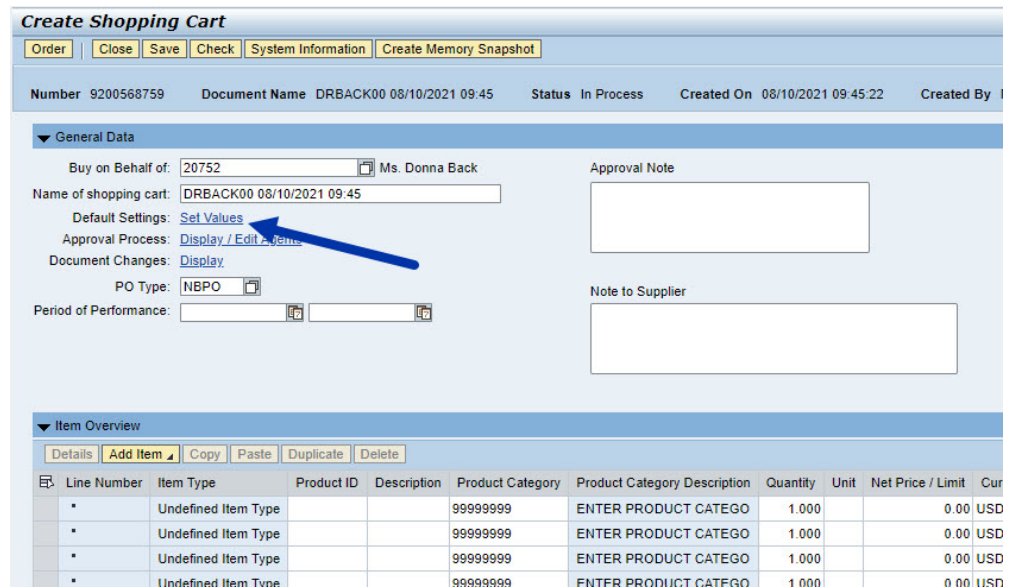
5. Select either Cost Center or WBS element from the Account Assignment Category dropdown	
6. Enter the Cost Center or WBS Element number. **Note:** If you are not sure what cost center or WBS element number to use, be sure to consult your supervisor or business officer.	
7. Click the **Delivery Address/Performance Location tab**	
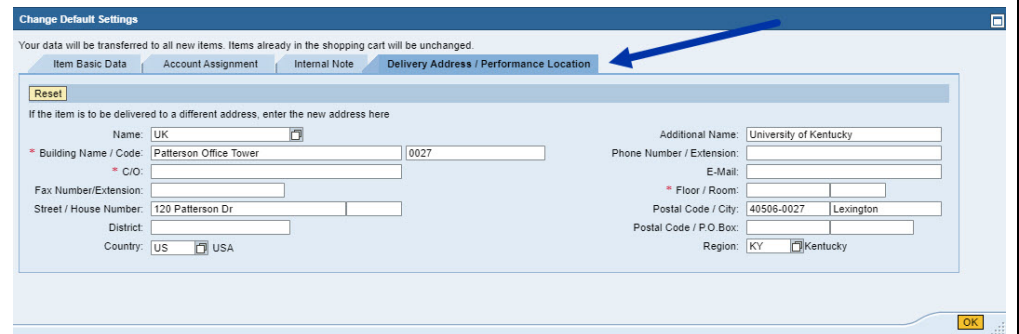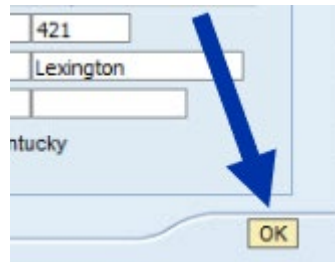
7. The Shopper *must* add the contact person, floor, and room number. This must be completed each time you start a Shopping Cart. Other information such as email address, phone number, etc. are not needed.	
8. Click the **OK** button	
8. Using the quote for reference, enter the description, quantity, unit of measure, price per unit and the delivery date. (This is the date when a physical delivery date is required from the supplier).	

9. Enter a Product Category. This is simply a general descriptive category in which the good or service fits and is selected via a search feature.

10. Click the search icon on the right side of the product category box

11. Enter a general key term for the type of item being purchased in the Description field. Place an asterisk on both ends of the term. Alternatively, you can also leave the search term blank for a full listing of product categories.

12. Click the **Start Search** button.

13. Highlight the most appropriate correct category from the search results list

14. Click **OK** to select

15. Enter additional line items from the quote, if applicable. **Note:** to save time, some components like the product category, can be copied and pasted from the other lines directly into cells.

16. When you complete all line-item entries, highlight the gray box to the left of the first line item and click the **Details** button to open the bottom section.

17. If the quote has supplier product numbers, they should be entered on the Item Data tab in the bottom details Section. You'll need to enter for each line item.

Note: If you have multiple line items, you can click the arrows above the Item Data tab to move among the different lines.

18. Click on the Account Assignment tab

19. Enter or edit the GL account. A suggested GL will populate automatically on many carts or can be overwritten as needed. The Shopper should check the GL to ensure it is correct based on the nature of the purchase.

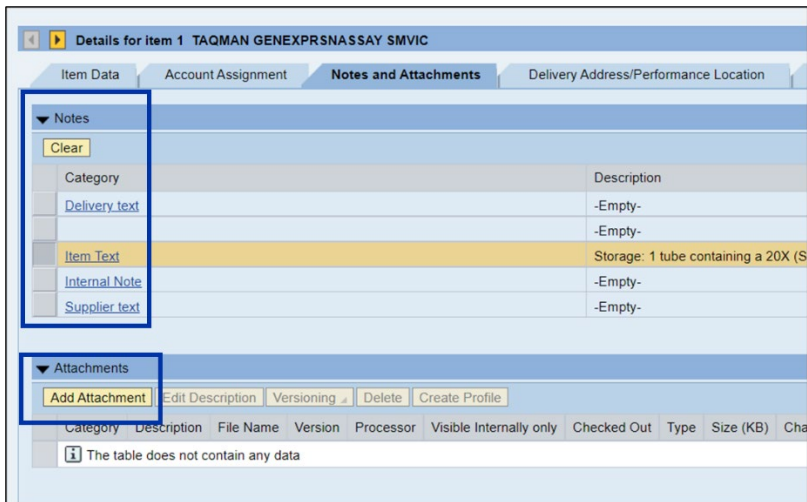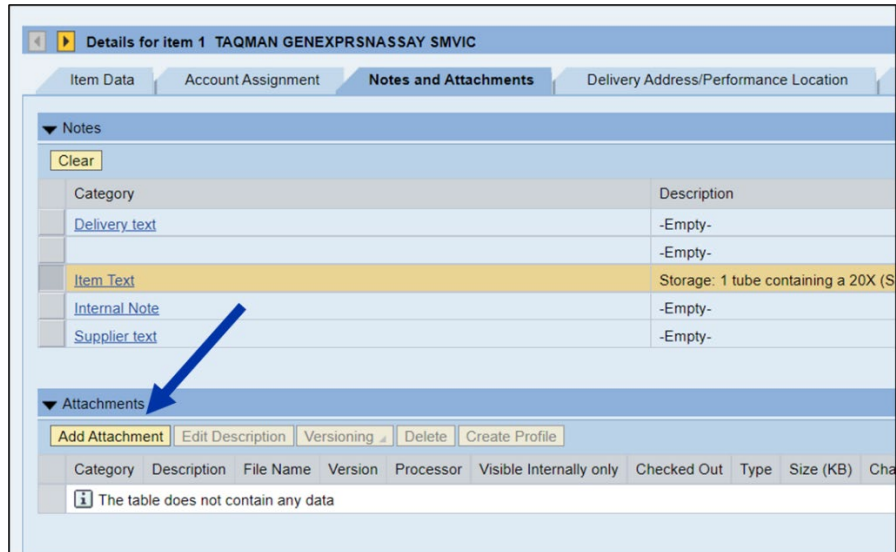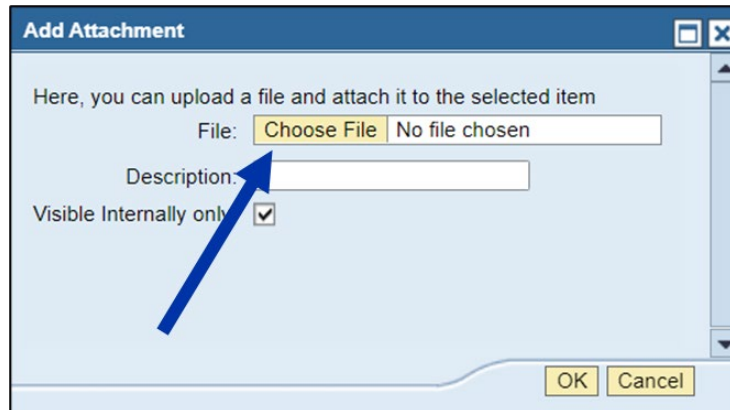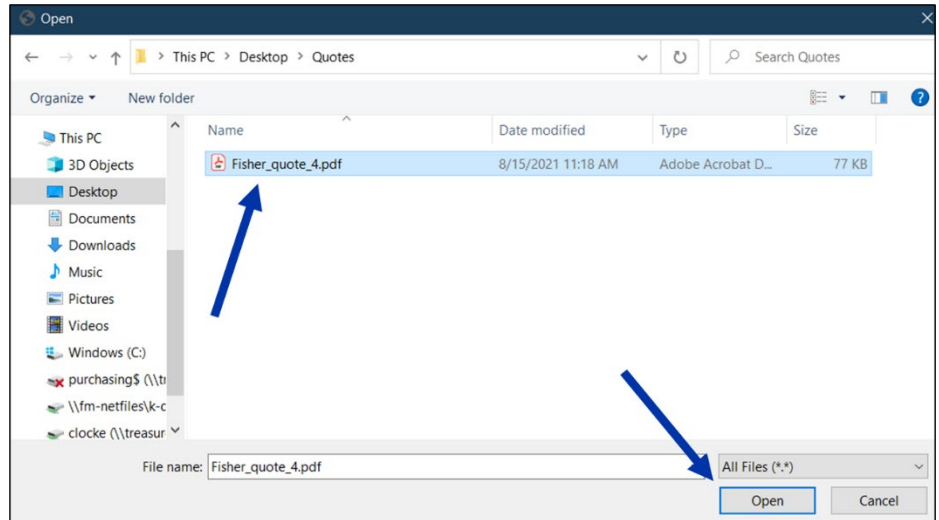|	
20. Click on the Notes and Attachments tab	
21. The supplier quote must be attached to the Shopping Cart. Other documents and notes can be added optionally from this tab.	
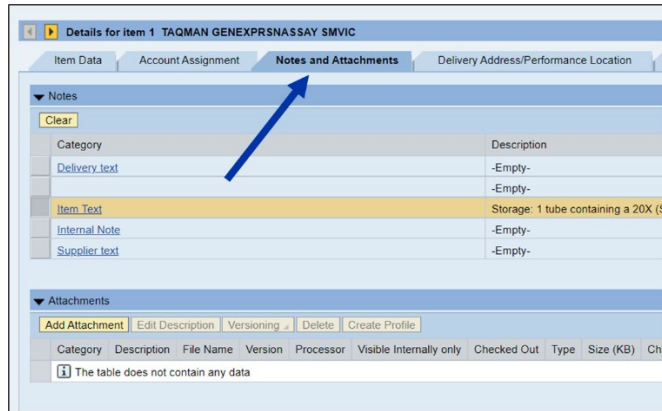
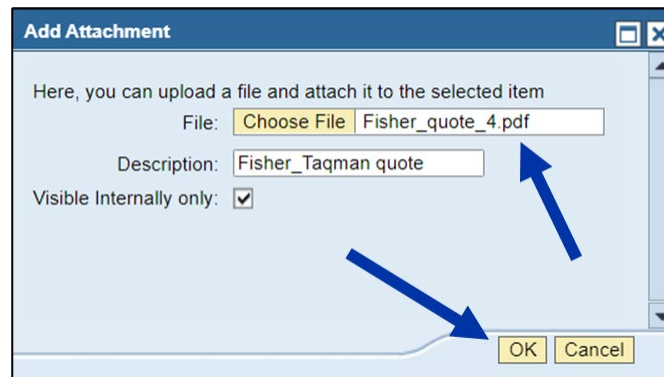|	
22. Click **Add Attachment**	
23. Click **Choose File** from the pop up window.	

24. Navigate to, locate, and select the quote file to attach from your computer.
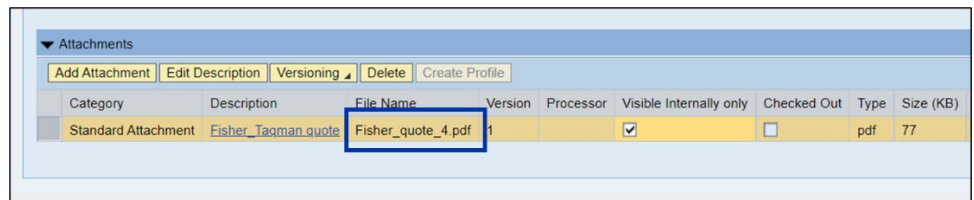
25. Click **Open**

26. Add a descriptive name for the quote and click **OK**.
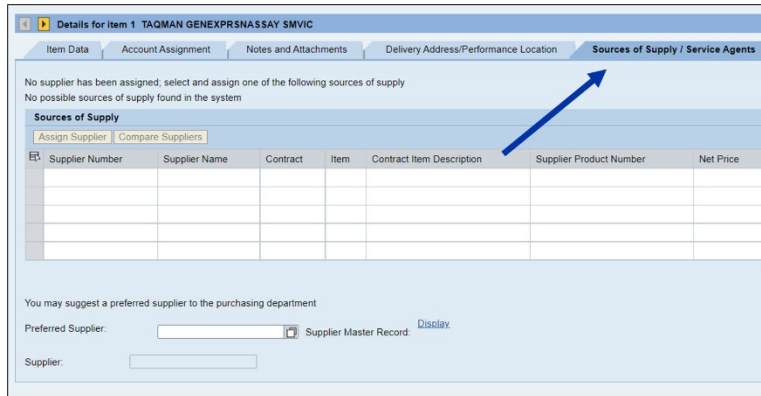
Note: quotes only need attached to line 1.

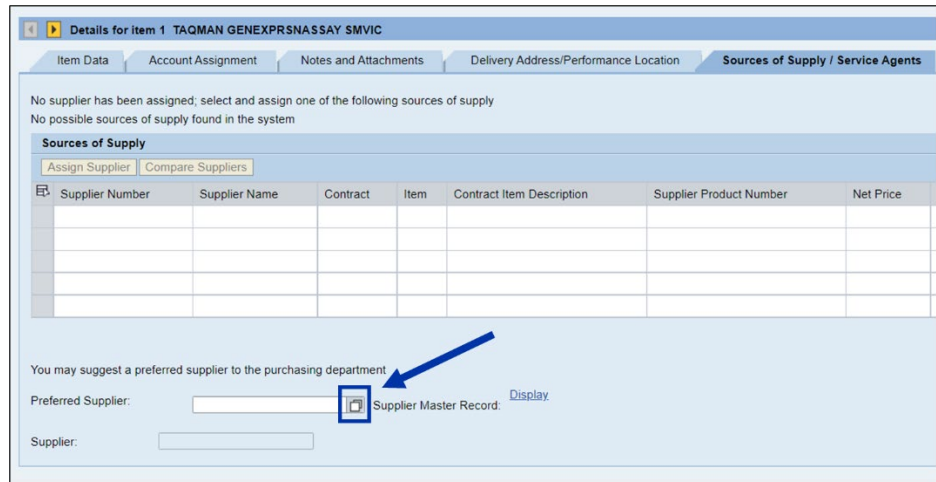27. Confirm that the quote successfully attached to the shopping cart.

28. Click on **Sources of Supply/ Service Agents** tab

29. Enter the vendor number for the Preferred Supplier.

30. If you don't know the number, click on the possibly entries icon on the right of Preferred Supplier box to begin a search.

31. Using the Name 1 field, enter key word(s) related to the Preferred Supplier name. Place asterisks around and between search terms for best results.
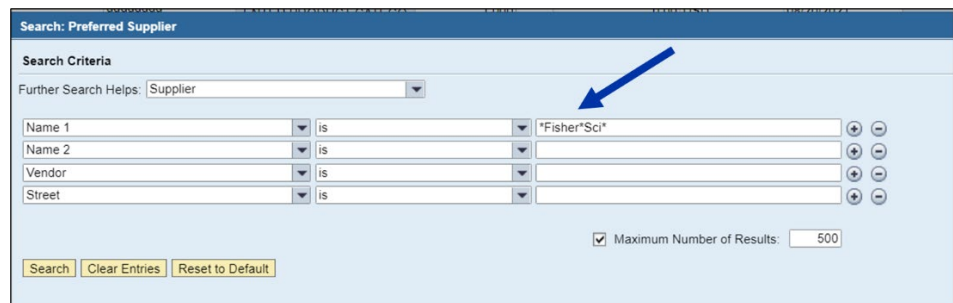
32. Click **Search**

33. Locate and select the correct supplier from the search results. The vendor number selected must have an address matching the one on the quote.

34. Confirm that the supplier number populates into the field.

Note: you will need to add the supplier number to each line. The supplier number can be entered manually for each additional line or simply copied and pasted into the cell for each line item.

Note: if you learn at this point that your intended supplier does not have a vendor number with the University, they will need to undergo a registration process. You can click the Save button at the top of the Shopping Cart to save your work. Once the supplier has a vendor number established, you can return to edit your cart, enter the vendor number and complete the remaining steps to finish.

35. Click the **Check** button at the top to confirm whether you have any errors.
If there are no errors, you are ready to order.

36. Click the **Order** button to finish.

Here is an easy to follow checklist for creating a free text shopping cart.

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	✔