

# 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

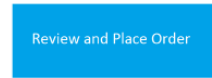
## Creating a Free Text Cart

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 COMPANY LLC  
4500 TURNBERRY DRIVE  
HANOVER PARK IL 60133-5491



[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](https://fishersci.com)

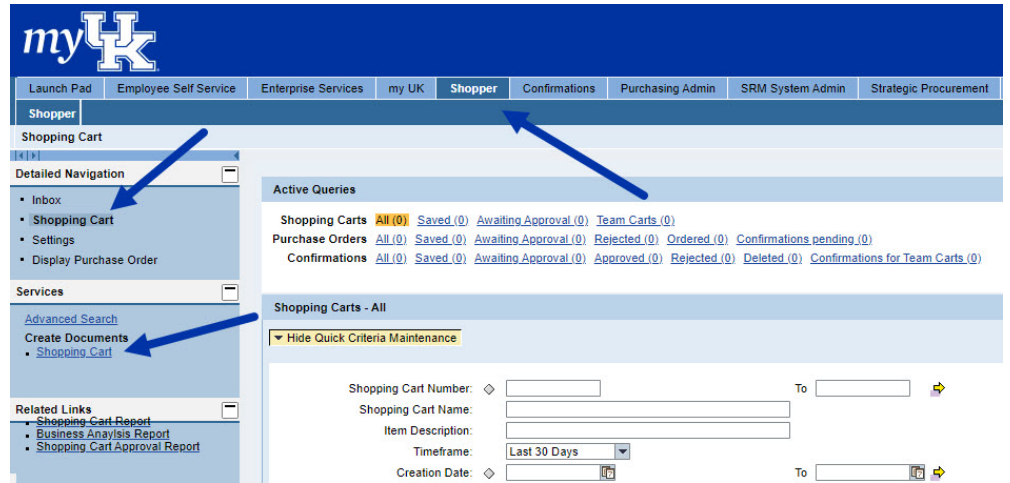
For complete Terms and Conditions, please [click here](#).

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

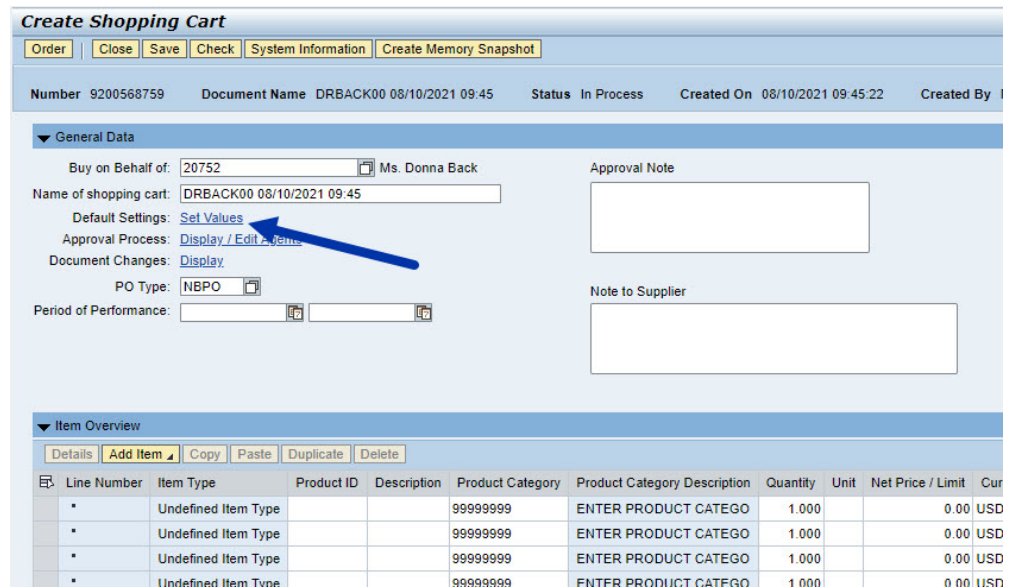
# FREE TEXT CARTS

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.

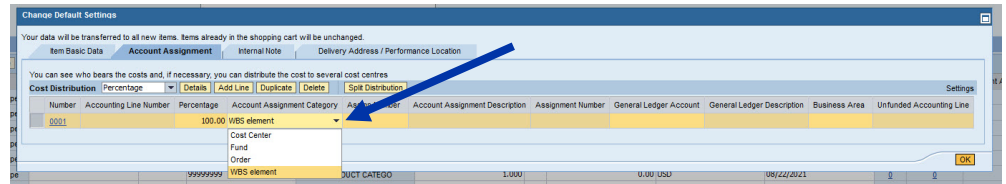


4. Before you order, you will need to complete the Delivery Address and set the Account Assignment. Entering values here will prevent you from having to enter the information line by line later. Click on **Set Values** found in the top header portion of the cart.



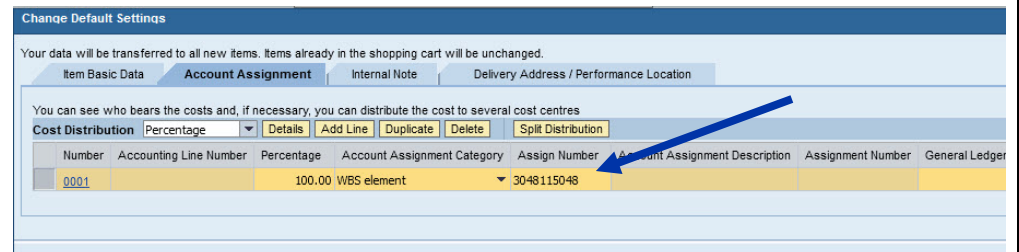
# FREE TEXT CARTS

5. Select either Cost Center or WBS element from the Account Assignment Category dropdown

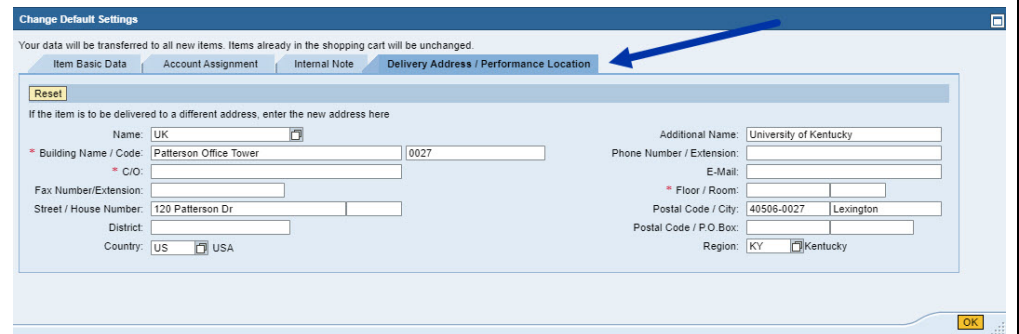


6. Enter the Cost Center or WBS Element number.

**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



## Quick Reference Card

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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.

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: UK

\* Building Name / Code: Patterson Office Tower 10027

\* C/O: Suzy Customer

Fax Number/Extension: 859-257-1951

Street / House Number: 120 Patterson Dr

District:

Country: US USA

Additional Name: University of Kentucky

Phone Number / Extension:

E-Mail:

\* Floor / Room: 4 421

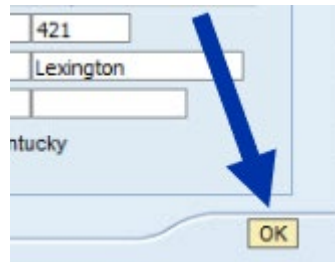
Postal Code / City: 40506 Lexington

Postal Code / P.O. Box:

Region: KY Kentucky

OK

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).

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

Line Number	Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency	Delivery Date
1	TAQMAN_GENEXPRSNSASSAY_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

## Quick Reference Card

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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

**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 | Approval Note: For research project CP-2021-015

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 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 GENEXPRNSASSAY SIMVC	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

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.

**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



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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.

**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

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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	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



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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.

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

**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**

Intercom Key / Location: [ ]

Plant / Location: [ ]

Storage Location: [ ]

Goods Recipient: [ ]

Delivery Date: [ ]

18. Click on the Account Assignment tab

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	1012027461	640311	640311	Chemicals&Lab Supply

Clipboard

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.

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

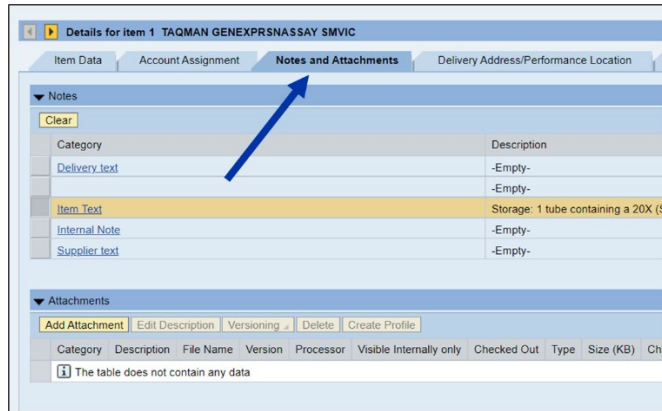
Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description
0001	100.00	Cost Center	1012027461	1012027461	640311	640311	Chemicals&Lab Supply

Clipboard

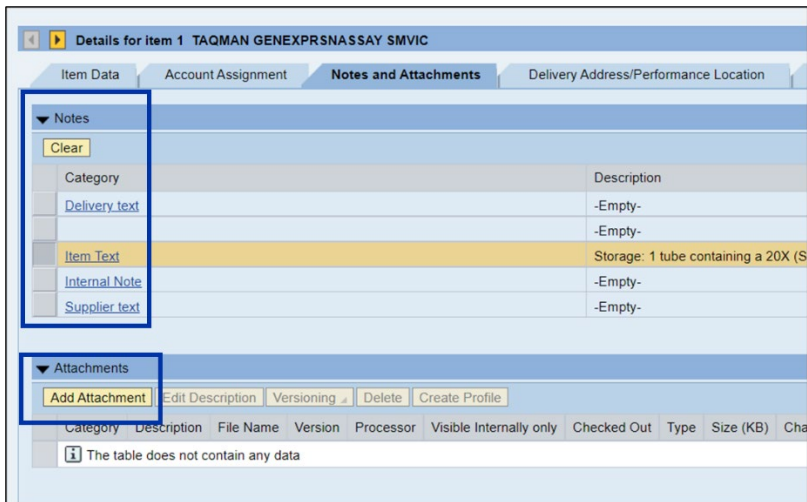


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20. Click on the Notes and Attachments tab

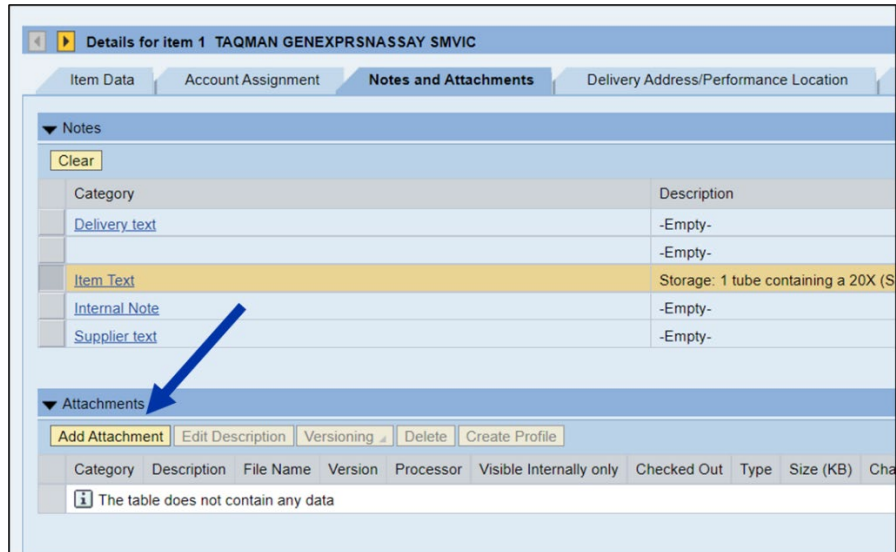


21. The supplier quote must be attached to the Shopping Cart. Other documents and notes can be added optionally from this tab.

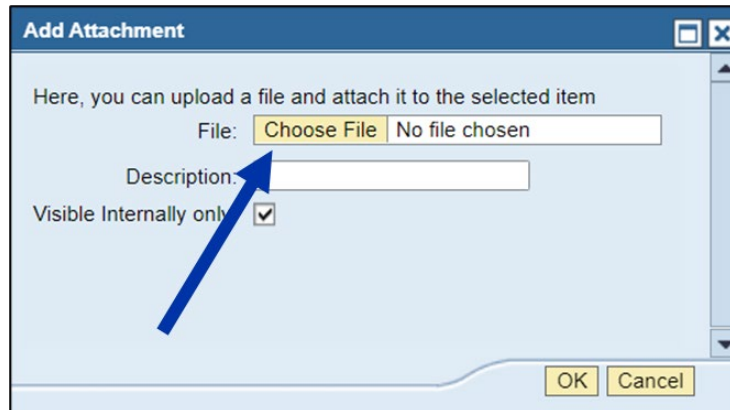


# FREE TEXT CARTS

22. Click **Add Attachment**



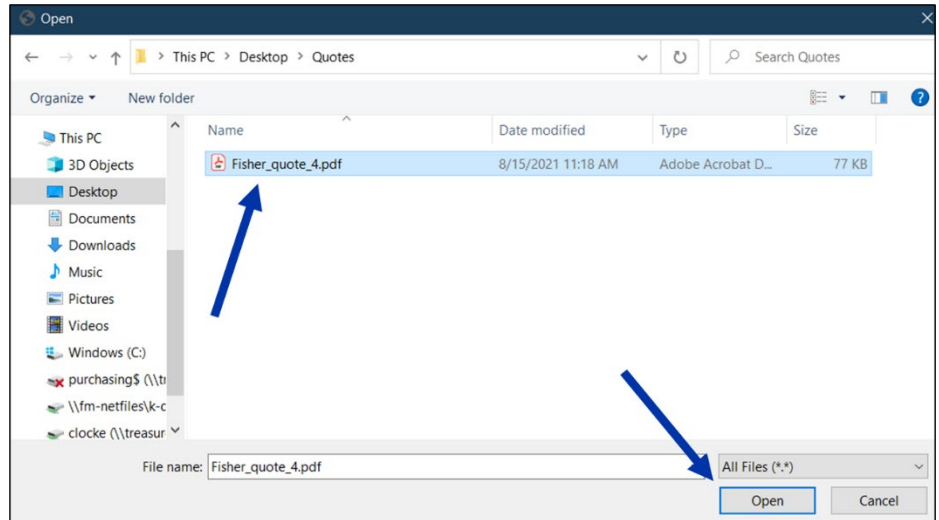
23. Click **Choose File** from the pop up window.



# FREE TEXT CARTS

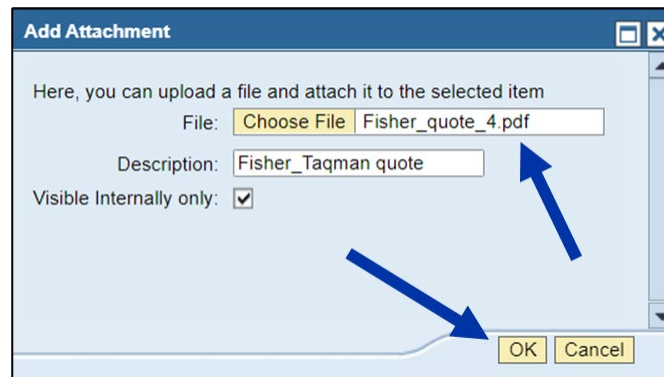
24. Navigate to, locate, and select the quote file to attach from your computer.

25. Click **Open**

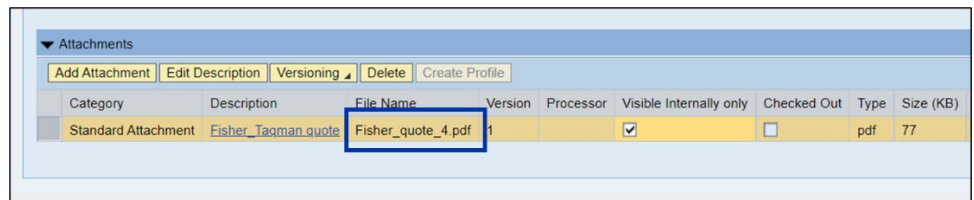


26. Add a descriptive name for the quote and click **OK**.

**Note:** quotes only need attached to line 1.

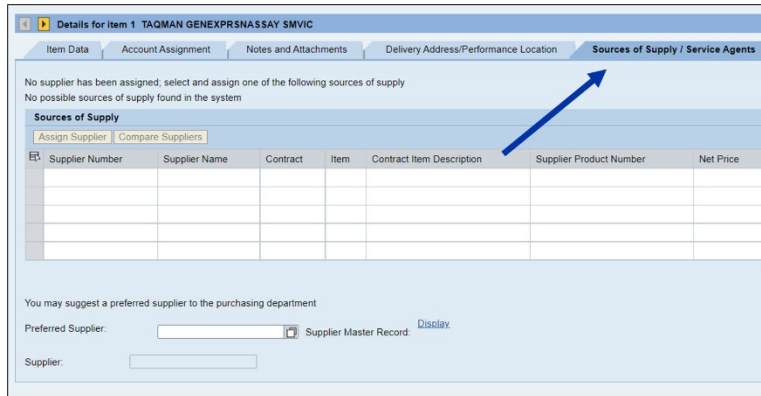


27. Confirm that the quote successfully attached to the shopping cart.



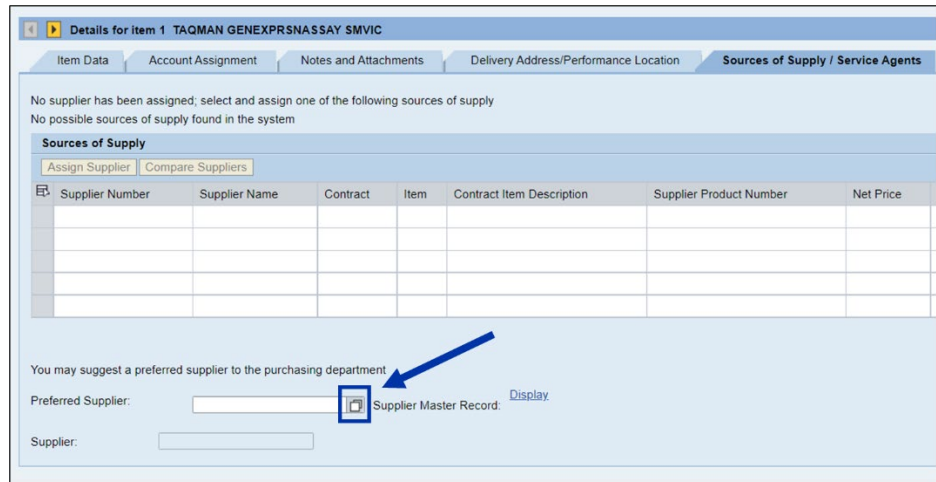
# FREE TEXT CARTS

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

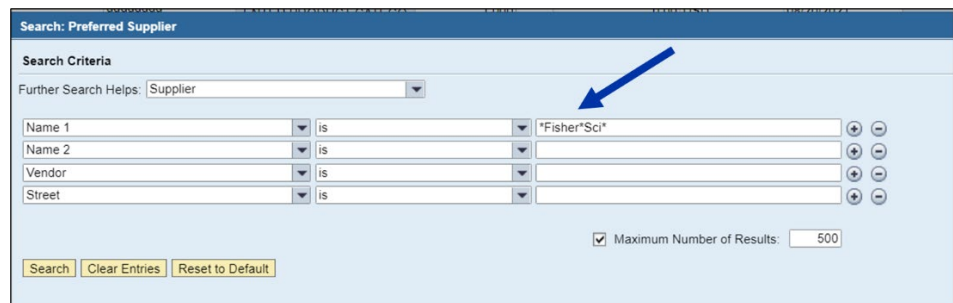


29. Enter the vendor number for the Preferred Supplier.

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**

# FREE TEXT CARTS

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.

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

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.

Supplier Number	Supplier Name	Contract	Item	Contract Item Description	Supplier Product Number	Net Price	Currency
119652	Fisher Scientific Company						

**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.

## Quick Reference Card

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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.

**Create Shopping Cart**

Order Close Save Check System Information Create Memory Snapshot

Shopping cart 9000575570 has 0 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

# FREE TEXT CARTS

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	✓