

Quick Reference Card

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

- 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

[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

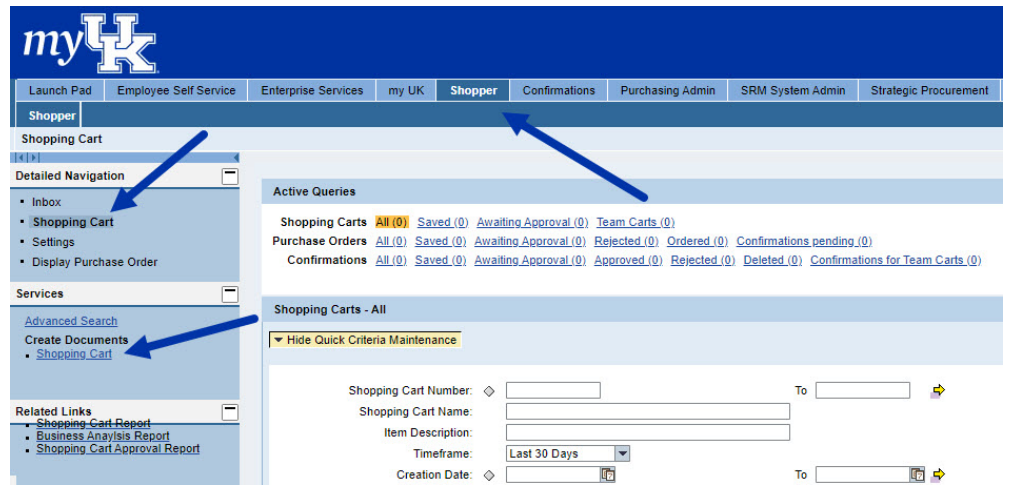
For complete Terms and Conditions, please [click here](#).

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

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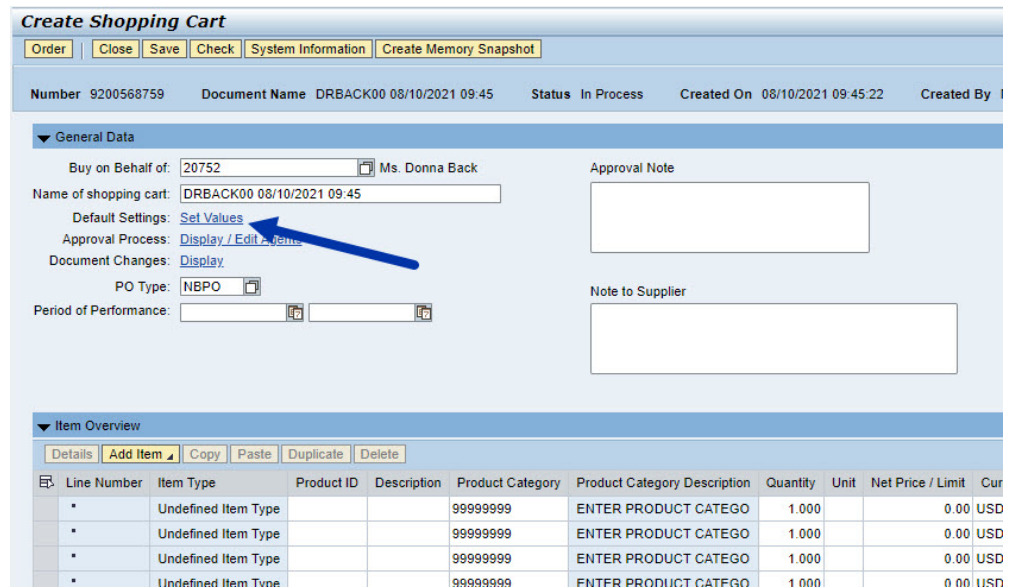
2. From the Shopper tab and dashboard, click **Shopping Cart** at the top of the left navigation link.

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.

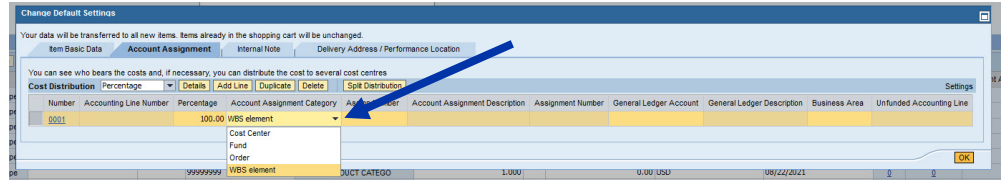
5. Click on **Set Values** found in the top header portion of the cart.



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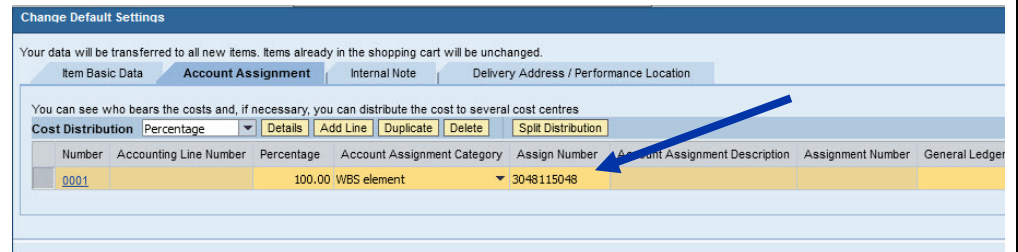
6. Click on the **Account Assignment** tab.

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



8. 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.



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9. 7. Click the **Delivery Address/Performance Location** tab

The screenshot shows the 'Change Default Settings' dialog box with the 'Delivery Address / Performance Location' tab selected. A blue arrow points to this tab. The form contains the following fields:

- Name: UK
- Building Name / Code: Patterson Office Tower 0027
- C/O: (empty)
- Fax Number/Extension: (empty)
- Street / House Number: 120 Patterson Dr
- District: (empty)
- Country: US USA
- Additional Name: University of Kentucky
- Phone Number / Extension: (empty)
- E-Mail: (empty)
- Floor / Room: (empty)
- Postal Code / City: 40506-0027 Lexington
- Postal Code / P.O. Box: (empty)
- Region: KY Kentucky

10. 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.

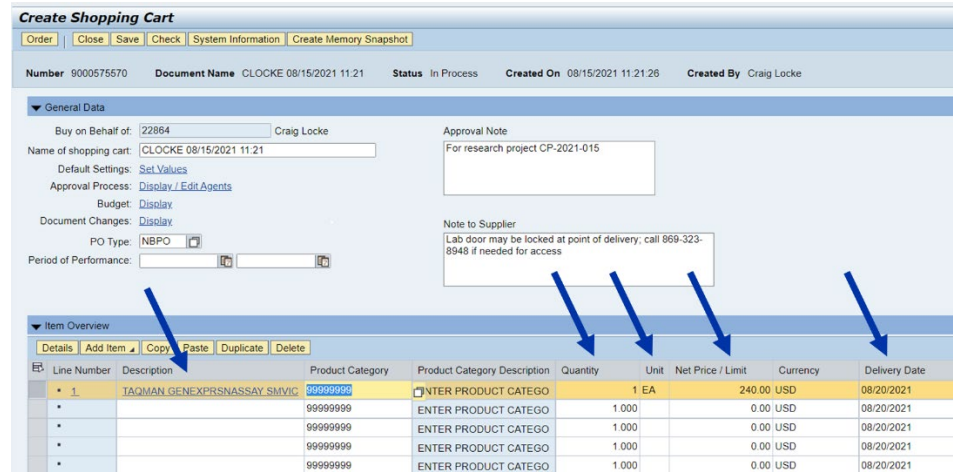
This screenshot is similar to the previous one but with three blue arrows pointing to specific fields: 'C/O' (containing 'Suzy Customer'), 'Floor / Room' (containing '4 421'), and 'Additional Name' (containing 'University of Kentucky').

11. Click the **OK** button

A close-up screenshot of the bottom right corner of the dialog box, showing the 'OK' button. A blue arrow points directly to the button.

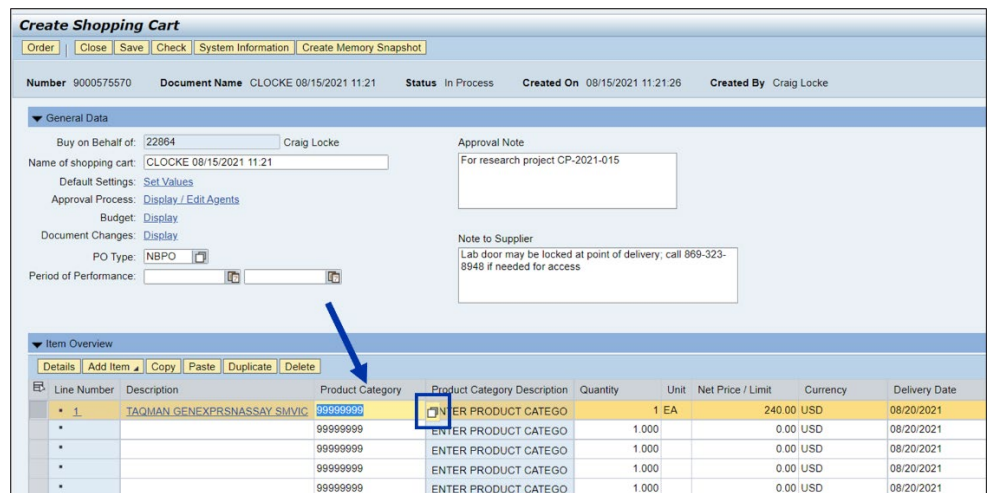
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12. Using the quote for reference, enter the description, quantity, unit of measure, price per unit and the delivery date. (This is the date when a physical delivery date is required from the supplier).



13. With your cursor still in one of the fields, click the **Enter** key to enter the information.

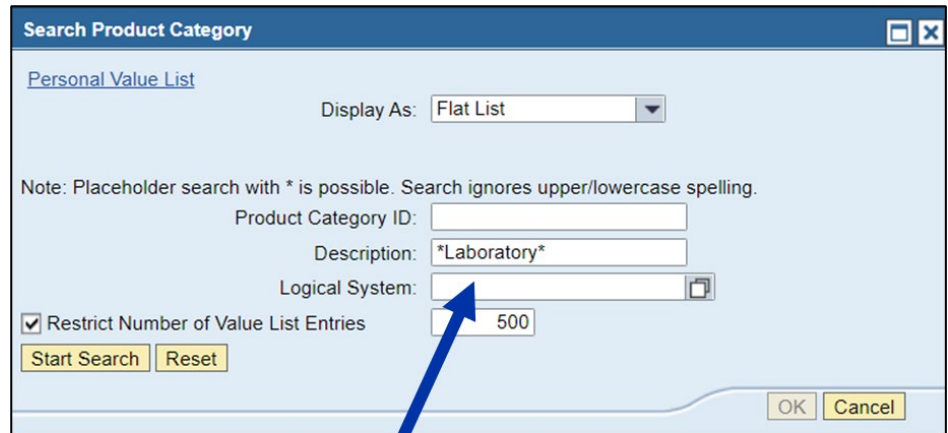
14. Enter a Product Category. This is simply a general descriptive category in which the good or service fits and is selected via a search feature.



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

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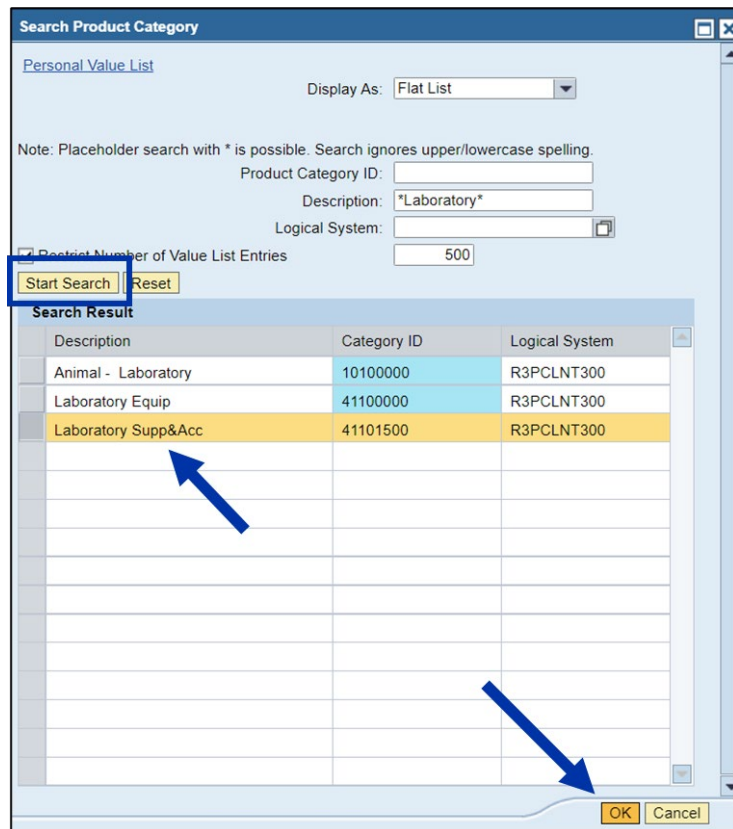
16. Enter a general key term for the type of item being purchased in the **Description** field. Place an asterisk on both ends of the term. Alternatively, you can also leave the search term blank for a full listing of product categories.



17. Click the **Start Search** button.

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

19. Click **OK** to select



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20. Enter additional 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.

21. 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.

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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22. 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.

23. **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 GENEXPRSASSAY 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 GENEXPRSASSAY 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:

24. Click on the Account Assignment tab

Details for item 1 TAQMAN GENEXPRSASSAY 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.

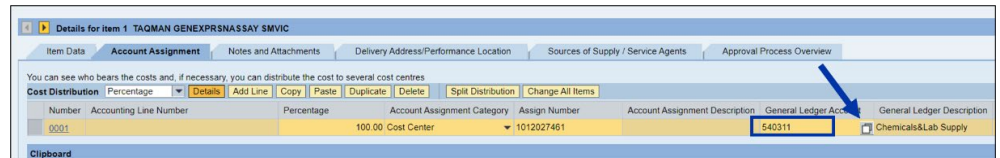
Cost Distribution: Percentage [Details](#) [Add Line](#) [Copy](#) [Paste](#) [Duplicate](#) [Delete](#) [Split Distribution](#) [Change All Items](#)

Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	General Ledger Account	General Ledger Description
0001		100.00	Cost Center	1012027481		540311	Chemicals&Lab Supply

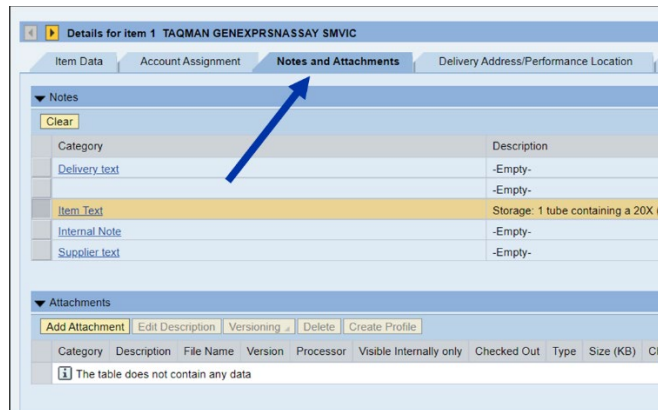
Clipboard

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25. 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.

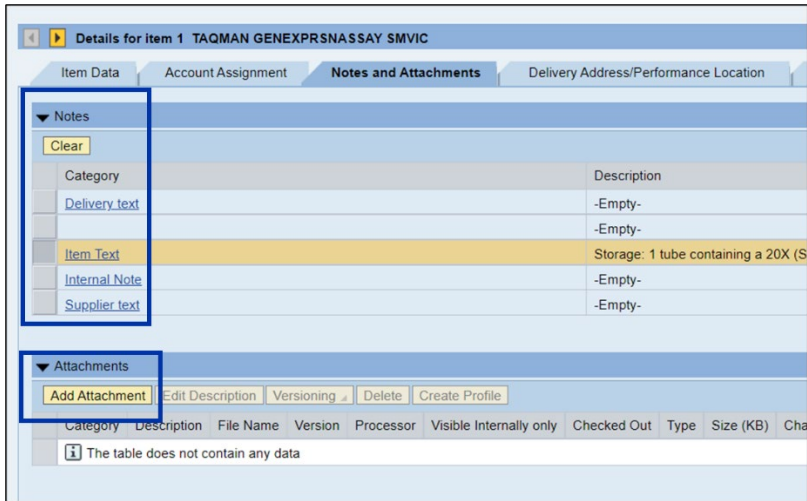


26. Click on the Notes and Attachments tab

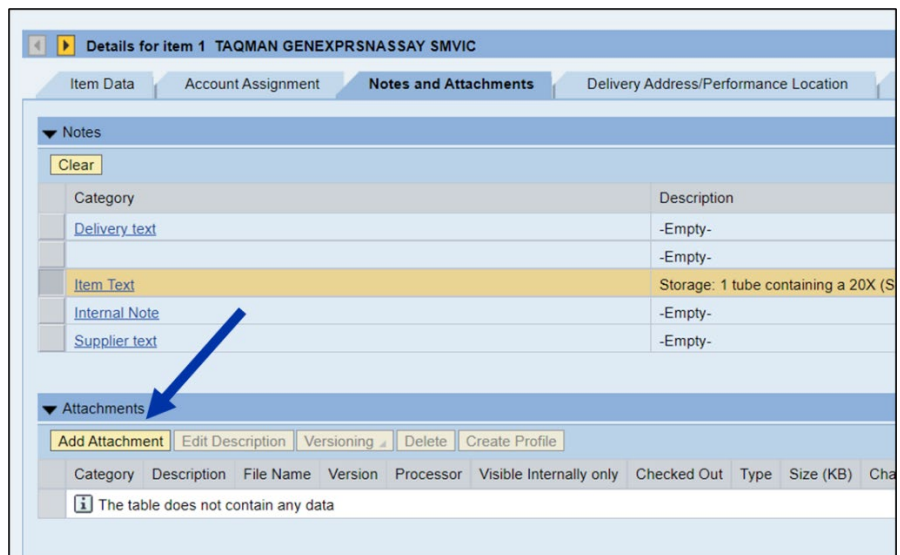


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27. The supplier quote *must be attached* to the Shopping Cart. Other documents and notes can be added optionally from this tab.

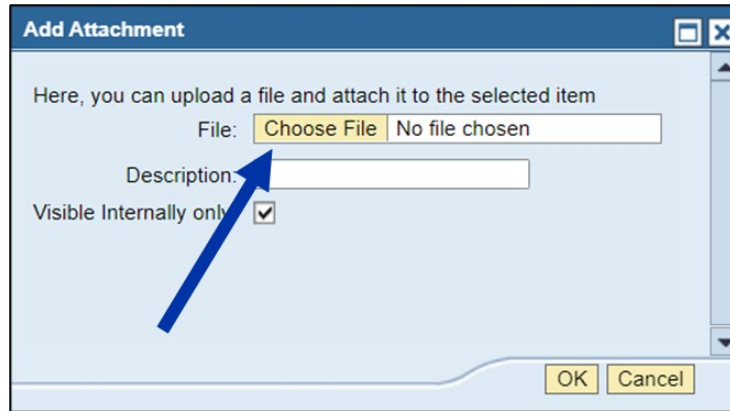


28. Click **Add Attachment**



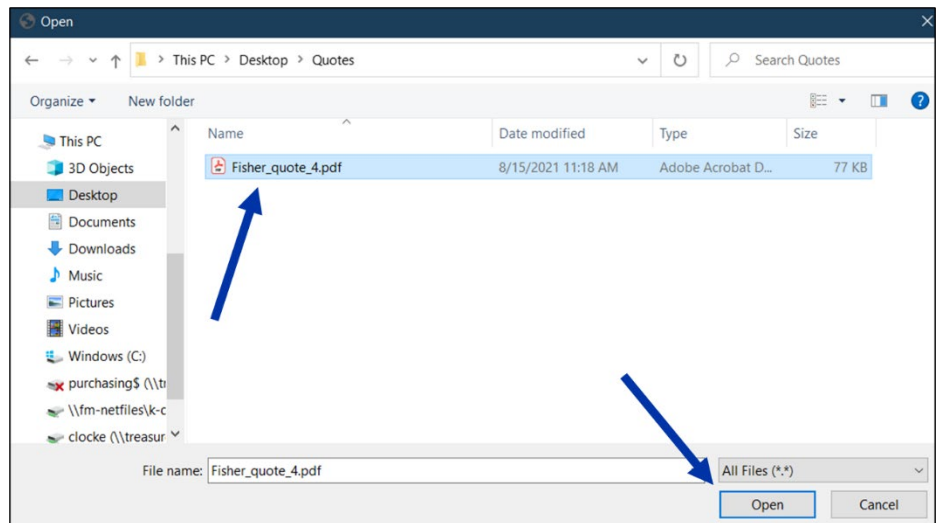
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29. Click **Choose File** from the pop up window.



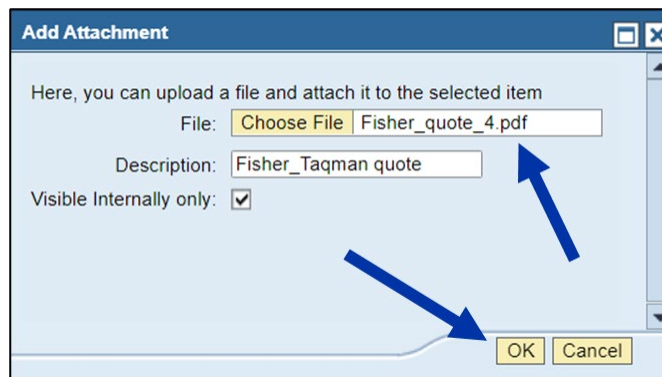
30. Navigate to, locate, and select the quote file to attach from your computer.

31. Click **Open**



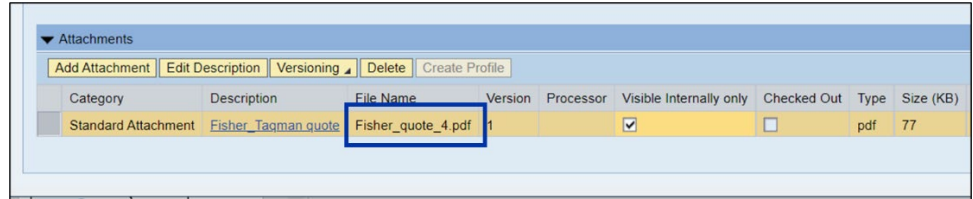
32. Add a descriptive name for the quote and click **OK**.

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

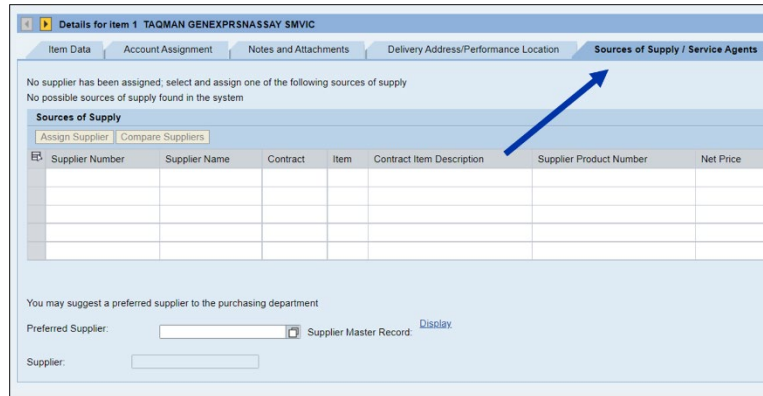


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34. Confirm that the quote successfully attached to the shopping cart.

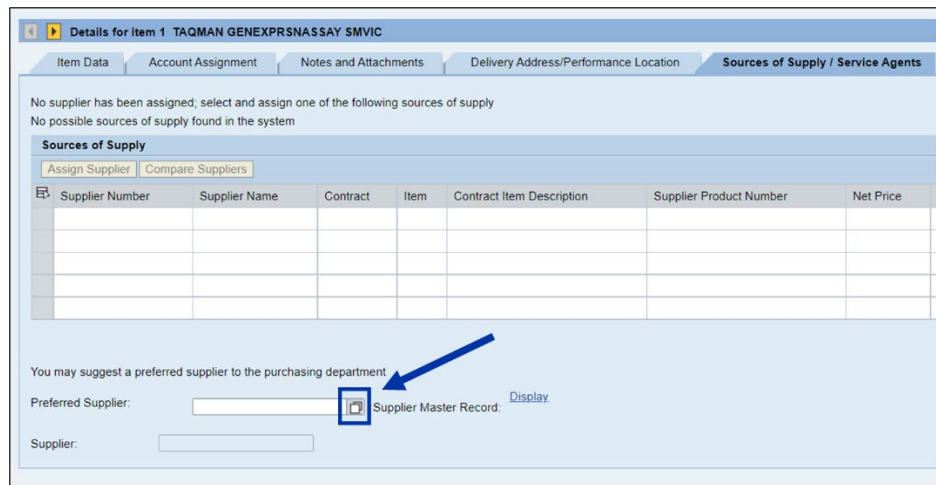


35. Click on **Sources of Supply/ Service Agents** tab



36. Enter the vendor number for the Preferred Supplier.

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



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38. 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.

Search: Preferred Supplier

Search Criteria

Further Search Helps: Supplier

Name 1 is *Fisher*Sci*

Name 2 is

Vendor is

Street is

Maximum Number of Results: 500

Search Clear Entries Reset to Default

39. Click **Search**

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

Search: Preferred Supplier

Search Criteria

Further Search Helps: Supplier

Name 1 is *FISHER*SCI*

Name 2 is

Vendor is

Street is

Maximum Number of Results: 500

Search Clear Entries Reset to Default

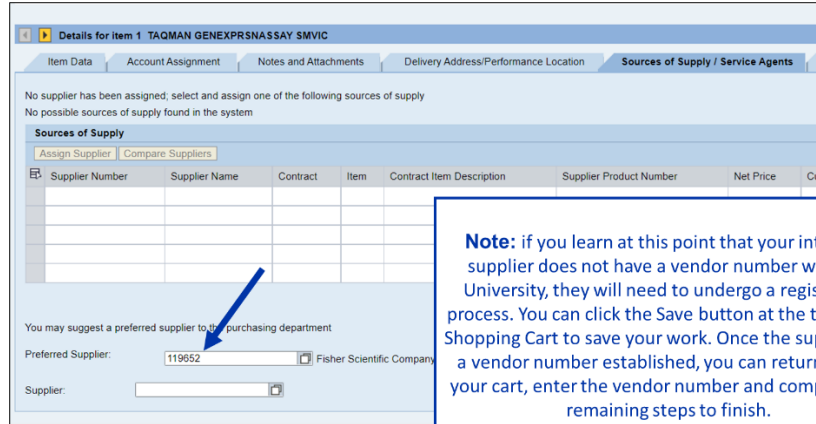
Results List: 8 results found for Preferred Supplier

Vendor	Name	Name 2	C...	House	Street	City	Region	Postal Code	B...
119652	Fisher Scientific Company		US		Tumberry 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	

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

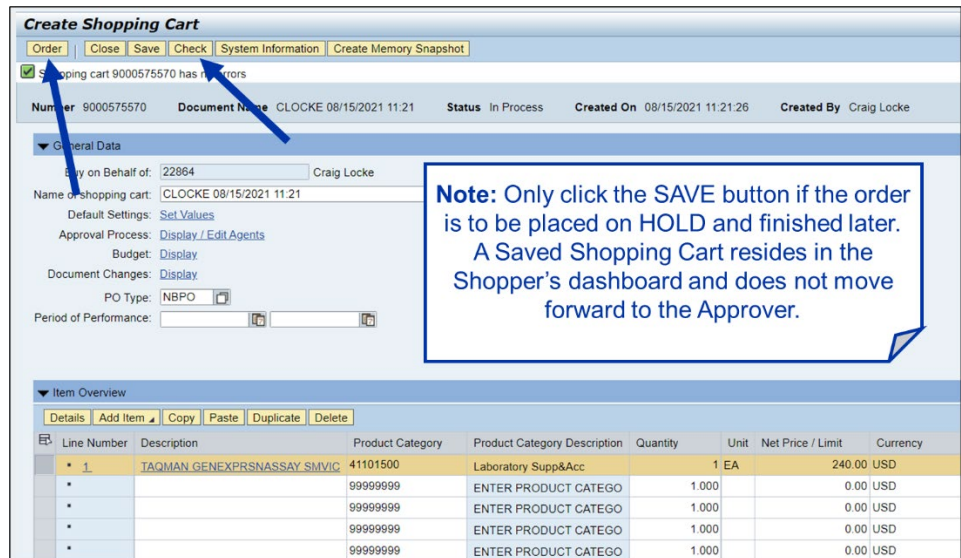
Note: you will need to add the supplier number to each line. The supplier number can be entered manually for each additional line or simply copied and pasted into the cell for each line item.



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.

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

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



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.

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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	✓