Quick Reference Card

Free Text Shopping Cart Orders - ODP

Process: Items from ODP can be ordered two ways within the Supplier Relationship Management (SRM) e-procurement system:

1. The ODP e-catalog is available for those holding the Shopper role. It is accessible via the Add-Item dropdown menu along with other e-catalogs. Quotes are not needed for e-catalog orders; Shoppers simply locate items from within the catalog, place them into their Shopping Cart, and checkout/order.

2. If needed, departments may purchase products from ODP beyond the items in the e-catalog by using the SRM Free Text Shopping Cart option. A quote must be acquired from an ODP sales rep. The shopper manually enters the line item information into the Free Text Cart. It is important to remember to enter the unit of measure and ODP part numbers exactly as they appear on the quote. As a refresher, the below steps reflect the Free Text Cart entry process specifically for ODP. If needed, additional help materials are available on the Purchasing website at: http://www.uky.edu/Purchasing/SRM.htm.

When working with an ODP 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.

Important: The unit of measure (UOM) placed onto the Shopping Cart line must be the same UOM as quoted by ODP. For example, if ODP quotes a product by the "case", the UOM selected on the Shopping Cart line must be the system match for "case".

Role: SRM Shoppers

Frequency: As needed

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Refresher/Quick Reference: How to Create Free Text Shopping Cart

<u>Reminder</u> : This is for Free Text Shopping Carts only, for items that are not available from the ODP e- catalog.	Contention Date VE22024 Customer ID 66543137 Quotation For Michele May - Quote for Instructional Purposes Quotation relationship Quotation For Michele May - Quote for Instructional Purposes Quotation relationship Comments: Pricing as of the date above; subject to change based on program pricing.						
1. The department obtains	ITEM •	DESCRIPTION	QUANTITY	UM	UNIT PRICE	AMOUNT	
quote from an ODP sales representative.	697893	Boise® ASPEN® 30 Multi-Use Printer & Copier Paper, Legal Size (8 1/2" x 14"), Ream Df 500 Sheets, 92 (U.S.) Brightness, 20 Lb, 30% Recycled, FSC® Certified, White	1	RM	8.63	8.63	
	790801	Pilot® G-2 Retractable Gel Pens, Fine Point, 0.7 mm, Clear Barrels, Blue Ink, Pack Of 12 Pens	1	DZ	17.79	17.79	
	7143564	Mind Reader Alloy Collection Coat Rack with 11 Hooks, 67–114"H x 17–1/2"W x 17–1/2"D, Silver Plor® G-2 Retractable Gel Pens, Fine Point,	1	Each	36.99	36.99	
	5860860	0.7 mm, Clear Barrels, Blue Ink, Pack Of 12 Pens	1	12 Pack	12.99 SUBTOTAL	12.99 \$ 76.40	
	CTHER TOTAL THER TOTAL T						
		THANK YOU FOR YOUR	BUSINES	<u>8</u> !			
2. Access the Shopper tab within myUK	dmin	Shopper	Pu	irc ha	asing		
3. Click Shopping Cart under the Navigation panel on the left side	Deta • In • St • St • Dis	ailed Navigation box hopping Cart ettings splay Purchase Ord	er				

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4. Click Create Documents – Shopping Cart	Shopping Cart Detailed Navigation Inbox Shopping Cart Settings Display Purchase Order Services Advanced Search Create Documents Shopping Cart Related Links Shopping Cart Report Shopping Cart Approval Report
5. Click Set Values under Default Settings in the header section of the cart	▼ General Data Buy on Behalf of: 22864 Image: Mr. Craig Locke Name of shopping cart: CLOCKE 09/28/2015 13:23 Default Settings: Set Values Default Settings: Set Values Display / Edit Agents Document Changes: Display PO Type: NBPO Image: MBPO Image: Mage:
 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 	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 Number Accounting Line Number Percentage Cost Center 0001 100.00
category if account number begins with 2 or 3	

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7. Select Delivery Address tab. Enter c/o name, room.	Change Default Settinge
and floor number for person	Vour data will be transferred to all new items. Items already in the shopping cart will be unchanged.
receiving delivery of items.	Reset
Click OK	If the Item is to be delivered to a different address, enter the new address here Name: UK * Building Name / Code: Frank D. Peterson Senkce Bldg # Floor / Room: 2 # Floor / Room: 2 Street / House Number: 411 S Limestone St District Postal Code / City: Country: US
8. Place quote number in the Note to Supplier text box	Approval Note
9. Items for Free Text orders	
are entered via freehand.	Description Product Category Product Category Description Quantity Unit Net Price / Limit Curren
an e-catalog within the Add	Copyer reger 44000000 Office EquipSuppleAcc 1 Cont 0.000 Col 0 Col
Item menu.	Coal Rack 4400000 Office EquipsuppARC LEA 35.99 USD Gel Pen 0.7mm Black 4400000 Office EquipSuppARC 1 PAC 1239 USD
Enter the item description, quantity, unit, and per each price from the quote, and required delivery date.	
*Important: The unit of measure (UOM) placed onto the Shopping Cart line must be the same UOM as quoted by ODP. For example, if ODP quotes a product by the "case", the UOM selected on the Shopping Cart line must be the system match for "case".	

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10. For Office Supplies purchases only, enter product category 44000000.	Description Product Calegory Copier Paper Legal 44000000 Gel Pen 0.7mm Blue 44000000 Coat Rack 44000000 Gel Pen 0.7mm Black 44000000	Product Category Description Quanti Office EquipSupp&Acc Office EquipSupp&Acc Office EquipSupp&Acc Office EquipSupp&Acc	ty Unit Net Price / Limit Curren 1 RM 8.63 USD 1 DZ 17.79 USD 1 EA 36.99 USD 1 PAC 12.99 USD
11. If multiple items are being ordered, repeat steps for other line items.When finished, click Details button to open the bottom section.	Item Overview International Copy Paste Duplicate Delete Line mper Item Type Internation Add Item _ Copy Paste Duplicate Delete Internation Add Item _ Copy Paste Internation Add Item _ Copy Paste Internation Add Item _ Copy Paste Internation Add Item _ Copy Paste Internation Add Item _ Copy Paste Internation Internatinternation Internation Internation Internation	Description Product Category Copier Paper Legal 4400000 Gel Pen 0.7mm Black 4400000 Gel Pen 0.7mm Black 4400000 Gel Pen 0.7mm Black 9999999	Product Category Description Quantity Unit Office EquipSupp&Acc 1 RM Office EquipSupp&Acc 1 DZ Office EquipSup&Acc 1 EA Office EquipSup&Acc 1 EA Office EquipSup&Acc 1 EA Office EquipSup&Acc 1 PAC ENTER PRODUCT CATEGO 1.000
12. On the Item Data tab, enter the Supplier Product Number (i.e., catalog number) for each line item		oles and Attachments Delivery A	
 13. Review and check the Account Assignment tab on the line item level. Shopper can overwrite the GL Account as needed. <u>Reminder</u>: If a piece of equipment is over \$5000, it requires a capital GL. 550030 is the most common capital GL for laboratory equipment. 	Control for them 1 Coper Paper Legal Inter Data Coper Paper Legal Inter Data Coper Paper Legal Inter Second Regiment Inter Second Regiment Inter Second Regiment Inter Second Regiment The Second Regiment Inter Second Regiment The Second Regiment Inter Second Regiment The Second Regiment The Second Regiment The Second Regiment Inter Second Regiment The Second Regiment Second Regiment The Second Regiment The Second Regiment Second Regiment The Second Regiment Second Regiment The Second Regiment Second Re	erformance Location 🦷 Sources of Suppor / Serice Agents 🏌 Agen Spel Developation Charge All Terms Account Assegment Cargony All Terms Cost Center • 143200130 STORES	ner Prozess Orenner ment Description Assignment Number 50233 Office Supples

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14. The quote must be attached to the Shopping Cart.Click Notes and Attachments tab in bottom Details section	Details for item 1 Copier Paper Legal Item Data Account Assignment Notes and Attachments Delivery Address/Pe Notes Clear Category Delivery text
Click Add Attachment	Item Text Internal Note Supplier text Attachments Add Attachment Edit Description Versioning ∠ Delete Create Profile Category Description File Name Version
15. Click Choose File	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
16. Locate and select the quote attachment to add. Click Open	Image: ODP Quote For Instructional Purpose Onl Image: 1/12/2024 10:43 AM Image: ODP Quote.jpg Image: 1/12/2024 10:22 AM Image: ODP Quote For Instructional Purpose OnlyxIsx Image: 1/12/2024 10:22 AM
	Open Cancel

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17. Name the a	ttachment	
Click OK		Add Attachment Here, you can upload a file and attach it to the selected item File: Choose File ODP Quote se Only.xlsx Description: Quote Visible Internally only:
18. Click the So Supply Tab to s supplier numbe	ources of et the r.	OK Cancel
For ODP only, e into the Preferre box.	nter 410126 ed Supplier	No supplier has been assigned; select and assign one of the toilowing sources of supply No possible sources of supply found in the system
Reminder: If the multiple line iter supplier number replicated on ea	ere are ms, the r must be ach line.	You may suggest a preferred supplier to the purchasing department Preferred Supplier: 410126
19. Click Order Shopping Cart. carts move to d approver(s) and Purchasing for p	to finish the All Free Text epartmental d onto processing.	Create Shopping Cart Order Close Save Check System Information Create Memo Number 9000123662 Document Name CLOCKE 09/28/2015 13:23
		Buy on Behalf of: 22864 Mr. Craig Locke Name of shopping cart: CLOCKE 09/28/2015 13:23 Default Settings: Set Values Approval Process: Display / Edit Agents