

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

Free Text Shopping Cart Orders - ODP

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

Reminder: This is for Free Text Shopping Carts only, for items that are not available from the ODP e-catalog.

1. The department obtains quote from an ODP sales representative.

Quotation

DATE: 1/12/2024
Customer ID: 66543137

Quotation For Michele May - Quote for Instructional Purposes
Quotation valid until: 2/11/2024
Prepared by: Lissette Lantieri

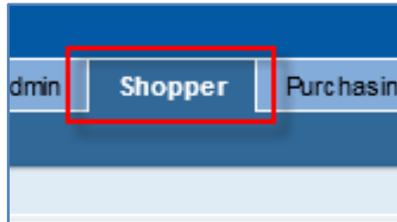
Comments: Pricing as of the date above; subject to change based on program pricing.

ITEM #	DESCRIPTION	QUANTITY	UM	UNIT PRICE	AMOUNT
697693	Boise® ASPEN® 30 Multi-Use Printer & Copier Paper, Legal Size (8 1/2" x 14"), Ream Of 500 Sheets, 32 (U.S.) Brightness, 20 Lb., 30% Recycled, FSC® Certified, White	1	RM	8.63	8.63
730801	Pilot® G-2 Retractable Gel Pens, Fine Point, 0.7 mm, Clear Barrels, Blue Ink, Pack Of 12 Pens	1	DZ	17.73	17.73
7143564	Mind Reader Alloy Collection Coar Rack with 11 Hooks, 67-14 1/4" x 17-1/2" x 17-1/2" D, Silver	1	Each	36.99	36.99
5860860	Pilot® G-2 Retractable Gel Pens, Fine Point, 0.7 mm, Clear Barrels, Blue Ink, Pack Of 12 Pens	1	12 Pack	12.99	12.99
SUBTOTAL					\$ 76.40
OTHER					
TOTAL					\$ 76.40

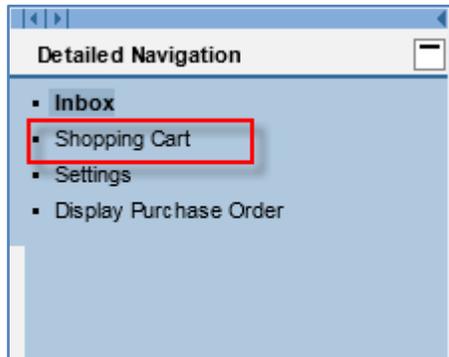
Please contact Lissette Lantieri (Ph: 407.701.5745 Em: Lissette.Lantieri@odpbusiness.com) with any questions.

THANK YOU FOR YOUR BUSINESS!

2. Access the Shopper tab within myUK

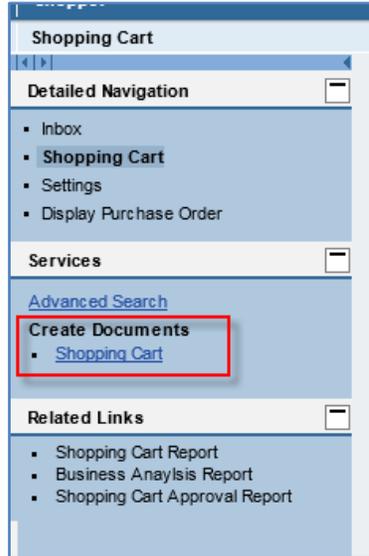


3. Click Shopping Cart under the Navigation panel on the left side

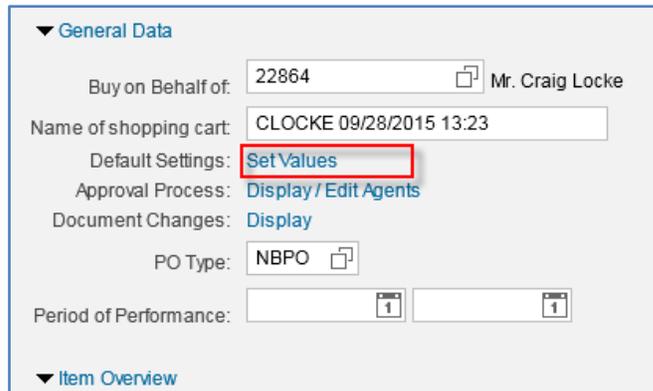


Free Text Shopping Cart Orders - ODP

4. Click Create Documents – Shopping Cart

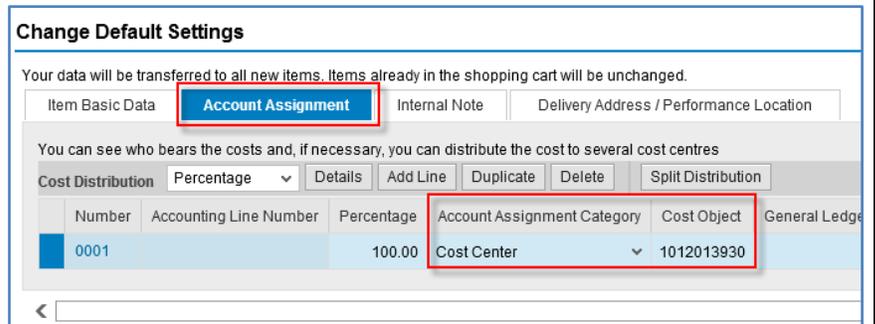


5. Click Set Values under Default Settings in the header section of the cart



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 category if account number begins with 2 or 3



Free Text Shopping Cart Orders - ODP

7. Select Delivery Address tab. Enter c/o name, room, and floor number for person receiving delivery of items.

Click OK

8. Place quote number in the Note to Supplier text box

9. Items for Free Text orders are entered via freehand. They are not selected from an e-catalog within the Add Item menu.

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".

Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency
Copier Paper Legal	44000000	Office EquipSupp&Acc	1	RM	8.63	USD
Gel Pen 0.7mm Blue	44000000	Office EquipSupp&Acc	1	DZ	17.79	USD
Coat Rack	44000000	Office EquipSupp&Acc	1	EA	36.99	USD
Gel Pen 0.7mm Black	44000000	Office EquipSupp&Acc	1	PAC	12.99	USD

Free Text Shopping Cart Orders - ODP

10. For Office Supplies purchases only, enter product category 44000000.

Description	Product Category	Product Category Description	Quantity	Unit	Net Price / Limit	Currency
Copier Paper Legal	44000000	Office EquipSupp&Acc	1	RM	8.63	USD
Gel Pen 0.7mm Blue	44000000	Office EquipSupp&Acc	1	DZ	17.79	USD
Coat Rack	44000000	Office EquipSupp&Acc	1	EA	36.99	USD
Gel Pen 0.7mm Black	44000000	Office EquipSupp&Acc	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.

Line Number	Item Type	Item Process type	Description	Product Category	Product Category Description	Quantity	Unit
1	Material		Copier Paper Legal	44000000	Office EquipSupp&Acc	1	RM
2	Material		Gel Pen 0.7mm Blue	44000000	Office EquipSupp&Acc	1	DZ
3	Material		Coat Rack	44000000	Office EquipSupp&Acc	1	EA
4	Material		Gel Pen 0.7mm Black	44000000	Office EquipSupp&Acc	1	PAC
*	Undefined Item Type			99999999	ENTER PRODUCT Catego	1.000	

12. On the Item Data tab, enter the Supplier Product Number (i.e., catalog number) for each line item

Details for item 1 Copier Paper Legal

Item Data | Account Assignment | Notes and Attachments | Delivery Address

Identification

Item Type: Material

Product ID: []

* Description: Copier Paper Legal

Catalog: []

Product Category: 44000000 Office EquipSupp&Acc

Order as Direct Material:

Organization

Purchasing Group: MM-Buyer-037 Wendy Holland Brown Show Members

Company Code: UK00 University of Kentucky

Further Properties

Supplier Product Number: 597893

Manufacturer Part Number: []

13. Review and check the Account Assignment tab on the line item level. Shopper can overwrite the GL Account as needed.

Reminder: If a piece of equipment is over \$5000, it requires a capital GL. 550030 is the most common capital GL for laboratory equipment.

Details for item 1 Copier Paper Legal

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 centers

Cost Distribution (Percentage) | Details | Add Line | Copy | Paste | Duplicate | Delete | Split Distribution | Change All Items

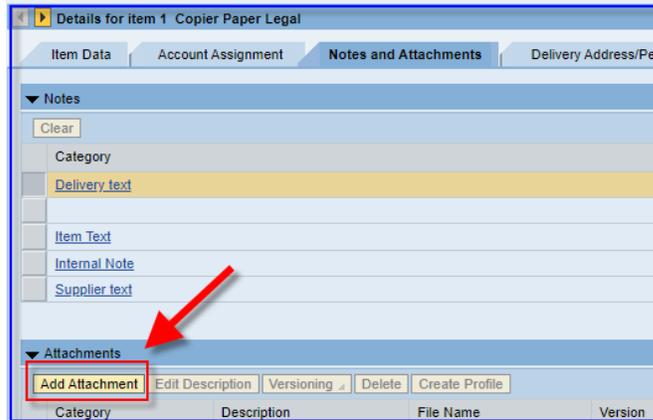
Number	Accounting Line Number	Percentage	Account Assignment Category	Assign Number	Account Assignment Description	Assignment Number	General Ledger Account	General Ledger Description
001		100.00	Cost Center	1043000130	STORES		540334	Office Supplies

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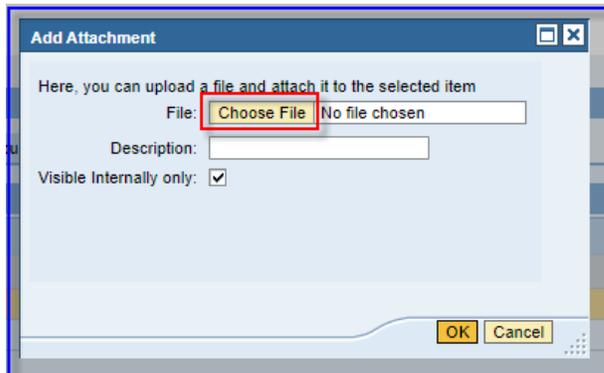
14. The quote must be attached to the Shopping Cart.

Click Notes and Attachments tab in bottom Details section

Click Add Attachment

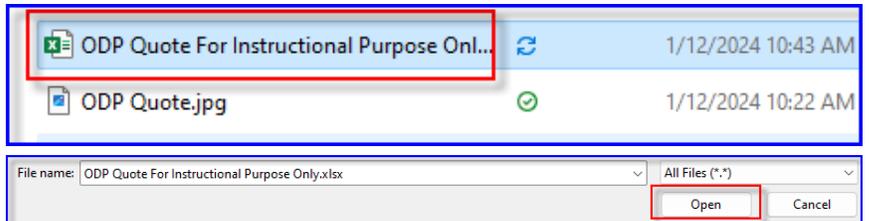


15. Click Choose File



16. Locate and select the quote attachment to add.

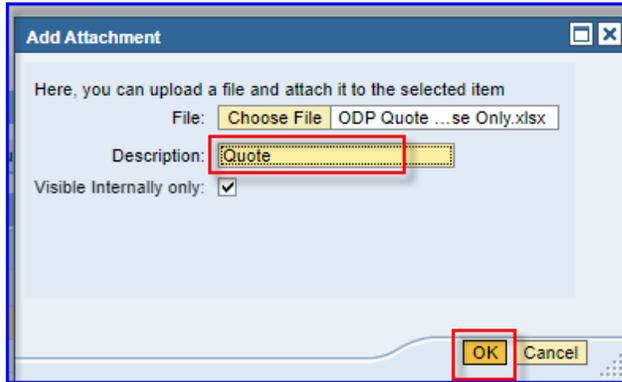
Click Open



Free Text Shopping Cart Orders - ODP

17. Name the attachment

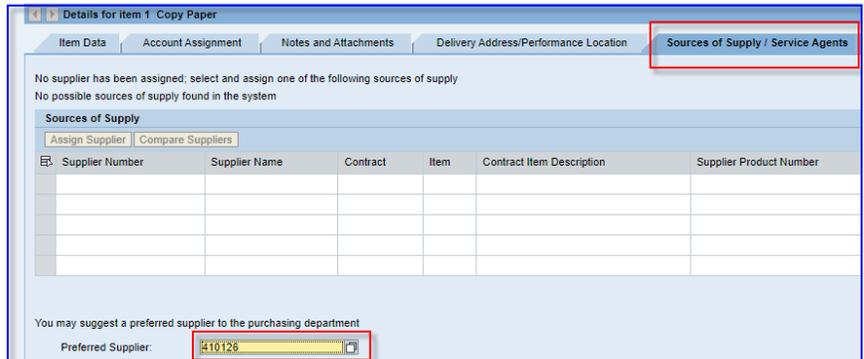
Click OK



18. Click the Sources of Supply Tab to set the supplier number.

For ODP only, enter 410126 into the Preferred Supplier box.

Reminder: If there are multiple line items, the supplier number must be replicated on each line.



19. Click Order to finish the Shopping Cart. All Free Text carts move to departmental approver(s) and onto Purchasing for processing.

