Shopping For Goods and Services

Creating a Shopping Cart

1. On the Shopping page, select the Create Shopping Cart link to open the Create Shopping Cart page.

2. On the page, review the information at the top and in the General Data section.

3. To change the name of the cart, enter a new name in the Name of shopping cart field. (Check if your business unit provides guidance regarding the naming of carts.)

4. If you wish to enter any of the default settings which will apply to this shopping cart, select the Set Values link. If default settings are not necessary for this cart, go to Step 9.

As an example, you may wish to change the delivery address, room number, or Goods Recipient for this cart only. Any changes you make in the Change Default Settings box will replace the defaults set in personalizations and will apply only to this specific shopping cart. Future carts will revert to your personalization defaults.

Note: Set values for the cart before placing items in the cart. Once items are placed in the cart, values will have to be set for each line of the cart.
Shopping Continued…

5. Select the **Item Basic Data** tab to make changes to the Room Number or Goods Recipient.

![Image of Item Basic Data tab](image)

6. If you wish to change the cart’s funding information, select the **Account Assignment** tab. Then select the Assign Number column and/or the G/L Account column and enter the changes.

![Image of Account Assignment tab](image)

One of the most common Account Assignment changes is to split the cost of the items between two or more Cost Objects. Detailed instructions for this change can be found in the Splitting Cost of Goods/Services section of this guide.

7. You may also wish to enter an Internal Note that will be associated with the shopping cart. This note is only visible within Duke. Once text is entered, select **OK**.

![Image of Internal Note](image)
Shopping Continued…

8. Finally, you can change the Delivery Address associated with the cart. Use Search to select addresses you set in your Personalizations if you entered more than one delivery address. Once the address is set, select OK. Detailed guidance is available for looking up delivery address.

9. If you wish to provide a note for your approver, (such as directing a reviewer to look at attachments), enter it in the Approval Note box. Detailed Notes should be entered in the Details section; this process is covered later in the guide.

10. You will use Attachment Type if you attach documents to the cart. Select the drop-down menu to identify the type of attachment.

Note: The process of attaching the documents to your cart is covered later in the guide.
Shopping Continued…

11. In the General Data section, two addresses display. The Default Address is the address set in your Personalizations. The Address Used on Cart is the address used for the specific cart. If an address is not available in either of these fields No Cart Address will be displayed as text in the field.

Note: If you have used an address on the cart different from the default address, it will not display until you return from the Marketplace or select Check.

12. Once you’ve reviewed the General Data section, move to the Item Overview section and begin to place items in your shopping cart.

13. You may select items for your Shopping Cart by:

- Selecting items from Punch-Out Supplier Catalogs;
- Selecting items from Hosted Supplier Catalogs; and
- Adding Non-Catalog (Text) Items which includes purchase orders created for services and confirming bill only purchase orders.

Note: Refer to the following sections of this guide for details on creating and submitting shopping carts for each of the catalogs listed above.