Frequently Asked Questions – Quick Reference Steps

How Do I Set or Edit a Delivery Address?

The delivery address is comprised of three pieces of data – the physical address of the building, the room number/location within the building, and information on the person receiving the goods/services.

1. From the Buy@Duke tab, select the Personalization page, and Edit.

2. Once the page is open for editing, in Attributes, select Delivery Address. If deliver addresses have been sent, they will display. If no delivery addresses have been set-up, the table will be blank.
Frequently Asked Questions Continued…

3. If a delivery address needs to be removed, highlight the link and select **Remove** to delete the line.

4. To add a new address, select **Add Line**.

5. If you know the Buy@Duke delivery address value for your location, type the number in the **Value** column. Select **Check** when complete. The **Value Description** field will populate with the number when you select enter. It will populate with text once you select **Check** or once you **Save**.

*Note:* If you select **Save**, remember to click **Edit** again to return to the **Edit Document** mode.
Frequently Asked Questions Continued…

6. If you do not know the Buy@Duke delivery address value, a search is available. In the new line, select the search box on the far right of the Value field.

7. In the resulting Search: Value screen, select Show Search Criteria.
8. In the resulting search screen, enter criteria to search for your delivery address. A few points to remember:
   a. Always use all caps when searching.
   b. Do not use an acronym. For example: MSRB 1, ATC, LSRC – will not return results. You must use part of their actually name.
   c. Surrounding your search term by asterisks will allow for an open search and does not require an exact match. If you do not use asterisks, you will need to know the entire name of your building exactly how it was set up in Buy@Duke.
   d. Use the Address 1 field for your building name and/or the Street Name as the foundation for your search. Always start with the Address 1 field and add in the street if necessary to narrow down your results.

Example 1: Looking for ATC – American Tobacco address on Blackwell Street. Three locations return. I would select the line with the building that was applicable to my location.
Frequently Asked Questions Continued...

Example 2: Looking for MSRB1 – Medical Sciences Research Building on Research Drive. I would enter the street because the search term *MEDICAL* returns 60 plus results without a street. Again I would select the building applicable to my location.

9. The new locations are added to your list. Select the radio button in the Standard column to set an address as your default.

Note: Do not select Deactivate as this will cause technical issues. If you select an address in error, highlight the line and select Remove.

10. To set the goods recipient, select Goods Recipient from the Attributes dropdown menu.
Frequently Asked Questions Continued...

11. Select **Add Line** and type in the name of the goods recipient in the **Value** column. You are limited to 12 characters in the name so abbreviate as necessary.

12. Select **Room Number** from the **Attribute** dropdown. Select **Add Line**. Type in the room number/location in the building where items should be delivered. You are limited to 25 characters, so be thoughtful about how to describe your location.

13. Once all information is added, select **Save**.
Frequently Asked Questions Continued…

How Do I Create or Edit My Personal Value List (PVL) for the Delivery Address?

If you create purchase orders for multiple delivery addresses, it is helpful to create a PVL for delivery addresses.

1. To create/edit the PVL for delivery address, select Create Shopping Cart from the Buy@Duke Shopping page.

2. Once in the cart, select Set Values. It is important to change the delivery address of the cart before adding items to the cart.
Frequently Asked Questions Continued…

3. From **Change Default Values**, select **Delivery Address**. Based on your screen display, you may need to select the arrow on the right side of the screen for the tab to display.

![Change Default Settings](image)

4. The default address set in personalizations will display. Select the search both to open the PVL.

![Change Default Settings](image)

5. From **Search: Delivery Address**, select **Maintain Personal Value List**. Notice the PVL is empty.

![Search: Delivery Address](image)

6. From **Edit Personal Value List: Delivery Address**, select **Show Search Criteria**. Depending on screen displays, you may need to use the bottom scroll bar to move to the right to access the search criteria.
7. In the **Search Criteria** screen, search for the delivery address. Select **Search** when complete. Keep in mind the following:
   a. Always use all caps when searching.
   b. Do not use an acronym. For example: MSRB 1, ATC, LSRC – will not return results. You must use part of their actually name.
   c. Surrounding your search term by asterisks will allow for an open search and does not require an exact match. If you do not use asterisks, you will need to know the entire name of your building exactly how it was set up in Buy@Duke.
   d. Use the Address 1 field for your building same and/or the Street Name as the foundation for your search. Always start with the Address 1 field and add in the street if necessary to narrow down your results.

8. Highlight the desired delivery address in **All Values** and use the arrows to move it to **Personal Value List**. Select **OK** once moved.
Frequently Asked Questions Continued…

9. The address now display in the PVL in Search: Delivery Address.
Frequently Asked Questions Continued…

What is the Best Way to Use the Shopping Carts All Inclusive Tab?

The Shopping Cart All Inclusive tab is the best way to search for cart activity.

1. On the Shopping page, highlight the Shopping Carts All Inclusive tab.

2. To search, select Show Quick Criteria Maintenance.
Frequently Asked Questions Continued...

3. Notice the variety of criteria that can be used to search for a cart. When each search criteria is used, select **Apply** to pull back information based on your search criteria. Some of the most helpful searches include:

a. Search by a timeframe. Notice the dropdown menu allows you to narrow or broaden the timeframe. The default displays carts for the past 30 days.

b. Create a custom date range by entering in a range for **Creation Date**.

c. This display includes carts created by all team members. To search for carts created by specific team members, enter the Net ID in Created by or search on name.
Frequently Asked Questions Continued…

d. Search based upon a particular status – for example approved carts or saved carts – using the **Status** dropdown.
Frequently Asked Questions Continued…

What Do I Do if My Cart Did Not Return from the Buy@Duke Marketplace?

Occasionally due to network connectivity issues, a cart created using a vendor catalog in the Marketplace, is not successfully returned into Buy@Duke. In this instance, you will need to retrieve and resubmit the cart.

1. From the Marketplace home page, select the dropdown menu by your name and select My Recently Completed Carts.

2. From your My Recent Requisitions list, select Resubmit Cart.

3. Using Resubmit Cart pulls the requisition back into the Buy@Duke cart and you can continue working.
Frequently Asked Questions Continued…

How Do I Look Up a Vendor and Add That Vendor to My Personal Value List When Creating a Text Order?

Creating a personal value list (PVL) of vendors who are frequently used but not in the Duke Marketplace is a great way to increase efficiency when working in Buy@Duke. If your vendor search returns multiple vendors, please contact Procurement at 919-681-1872 if you are unsure of which vendor to select.

1. From a Buy@Duke shopping cart, select the search box in the Supplier ID field to look-up a vendor. You can also enter the vendor number.

2. In the Supplier ID Search, enter the vendor name in Name 1. Use asterisks as a wildcard search. If the vendor does not display, use the same search in Name 2 as this field is used if a vendor has a DBA – Doing Business As – name. Select Search once information is entered.
Frequently Asked Questions Continued…

3. In the Results List, hover over the Supplier ID and right click the mouse to open a menu. From the menu, select Add to Personal Value List.

4. Double click the supplier number to return to the cart.

5. Select the search box in Supplier ID and you will now see the supplier added to your PVL.
Frequently Asked Questions Continued…

How Do I See Notes Associated With a Shopping Cart?

When notes are added to a shopping cart, users have the ability to display all notes associated with the shopping cart in one PDF both during the approval process and once a cart becomes a purchase order. Notes displayed on the PDF include approval notes, item notes, and supplier text.

1. To access the notes PDF, display the shopping cart and select **Display Notes**.

2. To access the notes PDF from the purchase order, open the purchase order and select **Display Notes** either from the **Overview** or the **Approval** pages.
Frequently Asked Questions Continued...

3. From Display Notes, the PDF combines a wide variety of information.

Supplier Text:

Notes added by Procurement for Supplier will be displayed here

Approval Note:

*** END APPROVALS ***
[JDARYL 04/30/2019 09:36:52]
UWL Approval Notes added to cart will be displayed
( JDARYL 04/30/2019 09:36:43 EST )

ITEM 1 - ProcSvc (SpecNd) approval needed
[ZASMT18 04/30/2019 09:36:43]
"["" Order "]"
Cart Approval Notes Displayed here
( ZASMT18 04/30/2019 09:35:37 EST )

Internal Note:

Notes added by Procurement for future reference will be displayed here

Item Notes:

<table>
<thead>
<tr>
<th>Line 1</th>
<th>Internal Note</th>
<th>Internal Notes for Display Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier Notes</td>
<td>Supplier Notes for Display Test</td>
<td></td>
</tr>
</tbody>
</table>