Shopping Continued…
Selecting Text (Non-Catalog) Items

Shoppers and Submitters may order goods and services that (1) are from suppliers that do not have a catalog in the Duke Marketplace; (2) are not found in either a Hosted or a Punch-Out catalog; or (3) can be found in a Marketplace catalog, but you have a special supplier quote that cannot be retrieved using the supplier’s catalog. They may also request payment for invoices for goods and services by designating a cart for Special Handling as a Confirming Order.

Text Carts are different from other Buy@Duke carts in that item descriptions and supplier information are entered manually.

**Note:** Since carts done by Text are based on quotes and other information provided by suppliers; they should always include an attachment.

1. Select the **Create Shopping Cart** link to open the Create Shopping Cart page.

2. Click in the **Supplier ID** field. If you know the SAP Supplier ID number, enter it in the field by typing. If you have created a **Personal Value List** (see below) select from your list.
Shopping Continued…

3. If you do not know the SAP Supplier ID number:
   - Select the search button which displays when you click into the Supplier ID box to show the Search: Supplier ID box.
   - In the Name 1/last name box, type in a portion of the supplier’s name, using asterisks as text wildcards. In our example below, for Scientific Device International, we used *Device* and the entire name is returned.
   - Select Search.

   ![Search: Supplier ID interface](image)

   **Note:** If searching in the Name1 field does not return desired results, try searching in the Name 2 field. The Name 2 field is used if a company has a “Doing Business As (DBA)” name. Companies with DBAs are often known by their DBA vs. actual name of the company. In the example below, the JB Duke Hotel is the DBA for JBD Hospitality LLC. Entering *JB Duke* in the Name 1 field will not return results.

   ![Search: Supplier ID interface](image)

   **Note:** If the search produces multiple results for the same supplier, contact the Procurement help desk for assistance in selecting the correct Supplier ID.
4. In the resulting list, click the **Name** field to select the supplier and populate the field. You may add the Supplier ID to your Personal Value List (see steps below).

5. Tab to the **Supplier Catalog Number** field and enter the supplier’s catalog number for the item. This is not a required field.

6. In the **Description** field, enter a short-text description of the first item you wish to place in your shopping cart.

   **Note:** Corporate Accounts Payable will use this text to match the Invoice with the Purchase Order line item. The text should match the quote or other information provided by the supplier.

7. Tab to the **Quantity** field and enter the number of this item to be ordered and placed in your shopping cart.
Shopping Continued…

8. Tab into the Unit of Measure (UOM) field. If you know the Unit of Measure, enter it in the field. If you don’t know the Unit of Measure:

- Select the search button which displays when you click into the UOM field.
- Select Search.

- Review the Unit Text list and click on the desired unit of measure. You may add the unit of measure to your Personal Value List (see steps below).

Note: If you are unsure of the correct unit of measure, EA (each) will work in most instances.

9. Tab to the Price field and enter the unit price for the item.
Shopping Continued…

10. In the Account Category field, choose the drop-down list to select the desired Cost Object.


12. Tab to the **Material Group** field.
Shopping Continued…

13. If you know the three-digit Material Group number, enter it in the field. If you do not know the Material Group number:

- Select the search button which displays when you click into the Material Group field.
- Select **Start Search**.

- In the resulting list, choose the Material Group to select the number and populate the field. You may add the Material Group to your Personal Value List (see steps below).
Shopping Continued…

14. Any quotes or other documentation received from suppliers should be referenced in the Notes section. These fields are row specific. Access Notes by selecting the hyperlink in the appropriate line. This opens the Details section below the Item Overview. Two types of notes may be recorded with the cart:

a. Supplier Text should be used to communicate details about the order with the supplier. The text will appear on the face of the purchase order when it is sent to the supplier. This field could include reference quote numbers, promotional codes, and other supplier-specific information.

b. Internal Notes are intended for communication. The notes are not visible on purchase orders sent to suppliers. Use this field for justifications, order notes, and other internal purposes.
Shopping Continued...

15. Attach any supporting documentation, for example quotes or service agreements, to the cart by selecting the hyperlink associated with the line. This will open the Details Section below the Item Overview.

   a. Select **Add Attachment** to open the Add Attachment window.

   ![Add Attachment Window]

   b. Use **Choose File** to search for the file you wish to attach. Once file is selected, select **Open**.
   c. Enter a description to help identify what is attached.
   d. The **Visible Internally only** check box is not used at Duke; therefore, checking or unchecking has no impact. If an attachment should be sent to the vendor, provide instructions in **Approval Notes** and flag the cart for **Special Handling**.
   e. Select **OK**. Repeat for each attachment.
Shopping Continued…

16. To review or change the information for this line item, highlight the line and select Details. The information appears on the series of tabs below the Item Overview box.

**Note:** If you add attachments to the cart that need to be sent to the supplier, provide specific information in the comments indicating what needs to be sent and flag the cart for special handling. This will be discussed later in this guide.

17. To place other items in the cart, continue entering the items on the subsequent lines following the steps outlined above.

18. If you wish to save the cart, select Save. You may return to the cart later to add items or change information.

19. When you have completed the cart, select Check and make any corrections that are indicated.

20. **If you are a Submitter** and have completed the cart, select Submit Cart. This action will move the cart to the next step in the ordering process.

21. **If you are a Shopper** and have completed the cart, select Notify and select from the menu either:
   - All Submitters to notify all your Submitters that the cart is ready for review; or
   - The email address of just one Submitter to notify only him or her that the cart is ready for review.
   - This action saves the cart and sends an email to selected submitters.

22. Close your browser.