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.

![Change Default Settings](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.

![Change Default Settings](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**.

![Change Default Settings](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**.

![Change Default Settings](image)

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.

![Create Shopping Cart](image)

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

![Attachment Type](image)

**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.

   ![General Data](image)

   **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.

   ![Item Overview](image)

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.
Shopping Continued…

Selecting Items from Supplier Punch-Out Catalogs

Supplier Punch-Out Catalogs are located in the Duke Marketplace and allow you to shop directly in a supplier’s online catalog and bring items back into Buy@Duke. These catalogs are maintained by the suppliers and reflect Duke-contracted prices. Each website is maintained by the supplier and will look and navigate differently.

1. In the Create Shopping Cart window, move to the Item Overview section where you will begin to place items in your Shopping Cart.

2. To add items to the Shopping Cart in the Item Overview section, select the Add Item button and select Duke Marketplace.
Shopping Continued…

3. The first time you enter the Duke Marketplace, you will be prompted to enter information on the Profile screen. Enter your First Name, Last Name, Phone Number, and Email Address. Then select **Save Changes**.

4. Click on the **Shop** icon to go to the main Duke Marketplace screen.
Shopping Continued…

5. Select a Punch-Out Supplier Catalog by clicking on the box with the supplier’s name.

Note: The catalog will open in a new browser window. When the supplier’s punch-out window opens, you will have moved from the Duke Marketplace to the supplier’s website. Each supplier’s website will look and function differently.
Shopping Continued…

6. Once in the supplier’s website (for our example it is VWR), confirm that this is the Duke-specific supplier site by locating the Duke logo at the top of the page.

7. Supplier’s website will typically provide a search box. You may be able to enter the supplier’s catalog item number, a part number, or a general search term in the appropriate fields and select the **Search** or **Find** button.
8. In the resulting list, narrow the list by using the various functions available on the supplier’s site. Functions available will vary by supplier but might include:

   a. Ability to further refine your search.
   b. Ability to compare items.
   c. Flags for specific items indicating programs.
   d. Hyperlinks providing detailed product descriptions.
   e. Sort items using a variety of criteria.

9. Once you identify the products you would like to purchase, enter the quantity and add the items to your cart.
Shopping Continued…

10. Repeat steps 8 and 9 until you have placed all the items in the shopping cart. Once you have placed all items in the shopping cart for this supplier’s website, perform the checkout functions as outlined on the supplier’s site. **This action will return you to the Duke Marketplace.**

11. Notice in the Duke Marketplace that you have now created a shopping cart. From your shopping cart, you can:

   a. **Continue Shopping** and return to the Marketplace home page where all vendors display.
   b. **Empty Cart** and begin again.
   c. **Update** the cart and add or delete the quantity of the items in the cart.
   d. **Finish Shopping – Add Items to your Buy@Duke Cart** to leave the Marketplace and return to Buy@Duke.
   e. **View your Cart** by selecting the shopping cart icon.
12. When you select Finish Shopping, you will return to the Create Shopping Cart page in the Buy@Duke website. Notice how the items you selected in the Duke Marketplace have moved into the shopping cart. In the event the cart returns empty, take a look at detailed instructions for pulling your items into the shopping cart.

13. Also notice how the financial information (Account Category, Account Assignment, and G/L Account), Room Number, and Good Recipient appear. These were pulled into the cart from the Attributes you set previously in your Personalizations. These fields may be edited if you need to make a change.

14. If you wish to add Attachments or Notes to the items in your cart, follow the steps in the Notes and Attachments section of this guide.

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

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

17. 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.

18. 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.

19. Close your browser.
Shopping Continued…

Selecting Items from Hosted Supplier Catalogs

Hosted Supplier Catalogs are located in the Duke Marketplace and are maintained by Procurement and Supply Chain Management staff members. Suppliers provide product listings and Duke-negotiated pricing for items in these electronic catalogs.

1. In the Create Shopping Cart window, move to the Item Overview section where you will begin to place items in your Shopping Cart.

2. To add items to the Shopping Cart in the Item Overview section, click on the Add Item button and select Duke Marketplace.

3. The first time you enter the Duke Marketplace, you will be prompted to enter information on the Profile screen. Enter your First Name, Last Name, Phone Number, and Email Address. Then select Save Changes.

4. Select the Shop icon to go to the main Duke Marketplace screen.
Shopping Continued…

5. On the Marketplace home page, select an item from a Hosted Supplier Catalog (Denville Scientific in this example) using the search function by clicking on the supplier’s button to open a search box specific to that supplier. Enter a description of the item or its catalog item number to place it in your cart, and then click on the Search button. To begin your search, use a singular noun to describe the item. You may also use asterisks (*) as text wild cards.

6. A list with all the items matching your criteria will appear.
Shopping Continued…

7. From this screen, you can take a variety of actions to refine your search:
   
a. On the left, narrow your search by entering descriptive words and clicking on the Go button. In this example, using “powder free” reduced the original list from 59 items to 26 items that include the words “powder free” in their descriptions.

b. In the Filter Results box, narrow or broaden the list by clicking on the various search criteria: By Supplier; By Manufacturer; By Packaging UOM (Unit of Measure).
   
   - Click on the funnel icon to view the criteria list.
   - Click in the box next to the items you wish to include as filter criteria. Select Filter.

   - If you wish to remove the filter, click on the funnel icon next to the criteria you used. The funnel will have a red negative sign next to it.

c. Compare items that are similar to each other to determine which product best meets your needs. Identify each item and then select Compare Selected.

8. To add an item to a Favorites folder, select it from the list and click on Add Favorite to open the Favorite window.

   *Note:* Using favorites will save time by eliminating searches for specific items you order on a regular basis.
Shopping Continued…

9. To create a folder, which must be done the first time you add a favorite, click on the Add new link and select Top level personal folder.

10. When prompted, enter a name for the folder and an optional description. Then click on the Save Changes buttons on the Create Personal Folder screen and the Add Favorite screen.
Shopping Continued…

11. In the future, you may begin your shopping cart by going directly to the Favorites folder, bypassing the various search functions.

You can select favorite items from each of the folders created. Additionally, favorites will be highlighted with a yellow star.

12. When you are ready to place items in the cart, review the list of items, select the specific item, and enter the number of items you wish to purchase. Then select the Add to Cart.
Shopping Continued…

13. Notice in the Duke Marketplace that you have now created a shopping cart. From here you may:
   
   a. **View your Cart** by selecting the shopping cart icon.
   
   b. **Continue Shopping** by searching on items in the Shop Hosted Catalog search box. This functionality is explored in more detail below.
   
   c. **Go To and Browse** additional searches and items.
   
   d. Return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home** page.

   ![Image](image.png)

   **Note:** **Shopping Hosted Catalogs** allows you to search for an item using both hosted and level two punch-out catalogs. Level two punch-out catalogs are designed with an "*" on the Marketplace home page.

   e. To search, enter the item description in the **Shop Hosted Catalogs** box and select **Go**. Notice there are now 4,000 plus results for gloves.
   
   f. Search **By Supplier** or **By Category** using the **Filter** as necessary.
   
   g. Items from a Hosted Supplier Catalog will have the **Add to Cart** button in their boxes.
   
   h. Items from Punch-Out Supplier Catalogs will have an **Order from Supplier** link in their boxes.

![Image](image.png)
Shopping Continued…

14. Once you’ve added all the items you wish to place in your cart, review the cart by selecting the shopping cart icon in the top right corner. Next, select **Checkout**.

15. When you have finished shopping, select **Finish Shopping**.
Shopping Continued…

16. When you select **Finish Shopping**, you will return to the **Create Shopping Cart** page in the Buy@Duke website. Notice how the items you selected in the Duke Marketplace have moved into the shopping cart.

17. Also notice how the financial information (Account Category, Account Assignment, and G/L Account), Room Number, and Good Recipient appear. These were pulled into the cart from the Attributes you set previously in your Personalizations. **These fields may be edited if you need to make a change.**

18. If you wish to add **Attachments** or **Notes** to the items in your cart, follow the steps in the **Notes and Attachments** section of this guide.

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

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

21. **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.

22. **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.

23. Close your browser.
Shopping Continued…

Live Price Plus – Search Functionality – Coming Soon

Enhanced search functionality is coming soon to the Duke Marketplace. The search functionality allows users to use the search box on the Marketplace home page to search for items in certain punch-out catalogs and add those items directly to a cart without opening the punch-out catalog. Staples will be the first vendor included in this search with others being added.

1. From the Marketplace, enter your item. The search works best when you include a specific model or an item or part number.

   Example: Search on HP 78A toner

   ![Search HP 78A toner](image)

   Example: Part number 770227

   ![Search Part number 770227](image)
Shopping Continued…

2. When the item and price return, select **Add to Cart**. The item will be added to your Marketplace Cart.

3. In some cases, the price may not return quickly.
   a. Select **Click to Retry** to retrieve the price.
   b. If that doesn’t retrieve the price, select **View Supplier Site**. This will take you to the punch-out catalog where you can continue searching for the item.
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.

\textbf{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 \textbf{Create Shopping Cart} link to open the Create Shopping Cart page.

2. Click in the \textbf{Supplier ID} field. If you know the SAP Supplier ID number, enter it in the field by typing. If you have created a \textbf{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](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](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.
Shopping Continued…

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

11. The **Account Assignment, GL Acct, Room No, and Goods Recipient** fields will populate, drawing in your preferred defaults set in your Personalizations.

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.

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.
Shopping Continued…

Creating a Standing Order Shopping Cart

Standing Orders may be placed for select goods and services departments routinely order. They are used primarily for maintenance contracts, repair services, dry ice, and gas cylinders. Standing Orders create purchase orders that allow for a specific dollar amount to be paid to a vendor over a specific period (not to exceed two years) of time. There is no specific quantity included in the purchase order; therefore, a goods receipt confirmation cannot be performed. It is important to remember that when a Standing Order is created in Buy@Duke, a financial commitment is created in SAP and represents a financial obligation for the department. Standing orders can only be expensed to one cost object; split funding is not allowed. If you have questions about whether a Standing Order is appropriate, please contact your department’s business office.

Standing Orders follow the same approval process as other Buy@Duke carts before routing to Procurement and Supply Chain Management for final review and creation of a Purchase Order.

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

2. On the Create Shopping Cart page, review the information at the top and in the **General Data** section. Rename the cart, confirm the delivery address, and add a note to the Approval Note field following your department’s guidelines.

![Create Shopping Cart Screenshot](image-url)
Shopping Continued...

3. Select **Add Item** and select **Standing Order**.

4. In the **Add Item as Standing Order** box, complete the fields as instructed below. Once all items are entered, select **OK**.

- **Description**: the goods or services to be ordered.
- **Material Group**: SAP material group that best fits the goods/services to be ordered.
- **Value Limit**: the upper limit of what you expect to spend for the duration of the Standing Order (**should match the Expected Value**).
- **Expected Value**: the amount you actually expect to spend for the duration of the Standing Order (**should match the Value Limit**).

  **Note**: *This value sets the Commitment amount created in SAP. It is important that Value Limit and Expected Value are the same.*

- **Required**: the date of the duration of the Standing Order, **not to exceed two years**. Not entering correct date values in these fields will result in an error and the order will not be processed.
- **Supplier**: the number that identifies the Supplier that is providing the goods or services.
- **Account Assignment**: Leave with the default **Known** setting unless instructed otherwise by your business office.
Shopping Continued…

5. The information entered creates the first line of the shopping cart. Default information established in Personalizations is added to the line. Change accounting information, room number, and goods receipt as necessary. Add notes or attachments if necessary. Submit the Shopping Cart per instructions outlined previously in this document.

Note: A standing purchase order only allows for one funding source. Split funding is not permissible.