

1 Set Defaults

- Your name and default cost assignment will appear
- Change cost assignment if necessary
- Specify Ship-to/Service Location (delivery)
- Next

2 Select Products

- Next

3 Edit Shopping Cart

- 1st item
 - Row 1
 - Material or Service (all expense items are services)
 - Product Category (from list)
 - Product Description
 - Supplier Item No. (if known)
 - Delivery Date (skip if service already selected)
 - Quantity
 - Unit (usually ea for each)
 - Price
 - Currency (defaults to USD for US \$) usually skip
 - Price Unit (skip)
 - Net Value/Limit (skip)
 - ERS Indicator (usually “with vendor invoice”)
 - Prepaid (usually blank)
 - Inventory Item (Yes if item should be barcoded and tracked on receipt)
 - Basic Data tab – General Information
 - Preferred Supplier - look up by clicking squares
 - (use * as wild card before or after – “*ollet*” will find Follett)
 - Service Period From or Delivery Date – Date Desired
 - Service Period To – If truly a service, end date else same as Date Desired
 - Deliver To tab – skip populated from screen 1
 - Notes tab – if desired Add Row “Internal Comment” for order processing or “Remark for Supplier” to show on order
 - Attachments tab – goes only to order processing – not to supplier or accounts payable
- Additional items from same supplier with same cost assignment
 - Click Copy (saves re-entering tab data)
 - Same as row 1 above with any relevant changes
- Shipping and Handling
 - Click Copy
 - Change Product Description to Shipping and Handling
 - Change Quantity to 1
 - Units each
 - Price estimated Shipping and Handling charge
 - Inventory Item always No
- All items entry complete
 - Click Check to confirm correct then
 - Save to come back later
 - Finish to send for approval and processing