

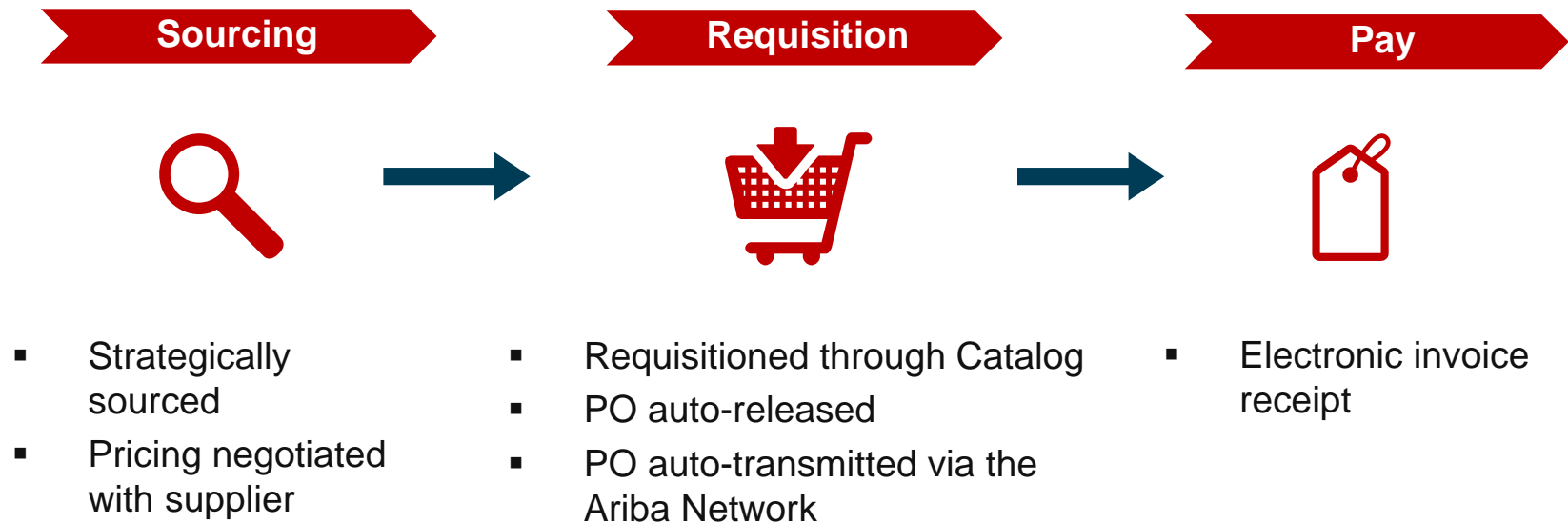
Purchase Requisition Generation via **Guided BU**ying Catalog Order



Purchase Requisition Generation via Guided **BU**ying Catalog Order

Guided **BUying** offers a central location to purchase a wide selection of products and services at competitive prices from a variety of suppliers. Products purchased through **Guided **BU**ying** Catalogs are considered competitively bid. Purchase from a catalog by searching within **Guided **BU**ying** and punching out to supplier website to add products or services to your cart.

Process Flow



Purchase Requisition Generation via Guided **BU**ying Catalog Order

Search for products, services, or suppliers within **Guided **BU**ying** and then punch out to the supplier website to purchase.

The screenshot displays the 'Guided Buying' interface. At the top, a search bar is highlighted with a red box and labeled '1A'. Below the search bar, a grid of category tiles is shown. The 'General Goods & Services' tile is highlighted with a red box and labeled '1B'. To the right of the category tiles, there is a sidebar with options like 'Request ad hoc item', 'Request on behalf of', and 'Recent requests'. Below the 'General Goods & Services' tile, a sub-grid of more specific categories is displayed. The 'Office Supplies' tile is highlighted with a red box and labeled '2'. The 'BOSTON UNIVERSITY' logo is visible in the bottom left corner.

1A Use the search bar to find the product, service, or the supplier catalog.

1B Alternatively, click the relevant category tile to find the product or service you need.

2 Specific categories will display. Select the specific category associated with the product or service for purchase.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Each category tile displays methods for procuring products and services as well as supplier information.

< Office Supplies

Sourcing & Procurement has partnered with W.B. Mason to bring you competitively-priced, quality office supplies with a focus on sustainable options and practices. Our contract with W.B. Mason offers discounted prices, same-day delivery, and streamlined ordering through Guided Buying. In addition to office supplies, W.B. Mason is also the preferred supplier for water filtration systems, desktop printers, and toner. Please see [Sourcing & Procurement's Office Supplies page](#) for more information.

3

WB Mason Punchout

Ad Hoc Office Supplies

Buy from Supplier

WB Mason Company
Boston, MA

3 Hover over the supplier catalog and click **Buy from Supplier**.

Note: BU has preferred suppliers across categories. **If available, always select one of the preferred suppliers.** More information can be found on the [Sourcing & Procurement Website](#).

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Search for the desired product within the punchout catalog.

- 4 Once in the catalog, search for the desired product(s).
- 5 Enter a quantity and click **Add to Cart**.

The image displays two screenshots of the Boston University Guided Buying catalog interface. The top screenshot shows the search bar with the text "coffee k cups" entered, highlighted by a red box and a red circle with the number 4. The bottom screenshot shows the search results for "COFFEE, TEA & COCOA / K-CUP", with the "ADD TO CART" button for the first product highlighted by a red box and a red circle with the number 5.

BOSTON UNIVERSITY

Guided Buying

Welcome, spokane@bu.edu of Boston University (C2369961 - Paved)

WHO BUY **W.B. MASON** TEST

Search W.B. Mason: coffee k cups

QUICK ORDER | CART | CHECKOUT | 0 Items | \$0.00

SHOP | SUPPORT | ORDERS | ACCOUNT CENTER | FAVORITES

ATTENTION - This website should only be used for TESTING.

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Welcome Boston University

WHAT'S NEW?

The new "Swap and Save" Program now provides an easy way to find comparable, lower cost BU preferred items. Swap items without the hassle of account approval. When an item is added to the cart, it will be automatically swapped with the preferred item.

COFFEE, TEA & COCOA / K-CUP

Showing Items 1 to 12 of 267

Sort by: Preferred Items | Results Per Page: 12

YOUR SELECTIONS

ADD TO CART | COMPARE | ADD TO LIST | 0 Selected | Grid View | List View

BREW TYPE

K Cup

CATEGORY

Coffee, Tea & Cocoa

REFINE RESULTS

BRAND

Dunkin' Donuts® (9)
Shazam™ (10)
Green Mountain Coffee® (12)
Maxwell House® (4)
Bigelow® (6)
Café Escapades® (1)
Celestial Seasonings® (13)
Coffee People® (4)
Lipton® (4)
New England® Coffee (4)
Starbucks® (13)
Sassa Maya® (2)
Caribou Coffee® (11)

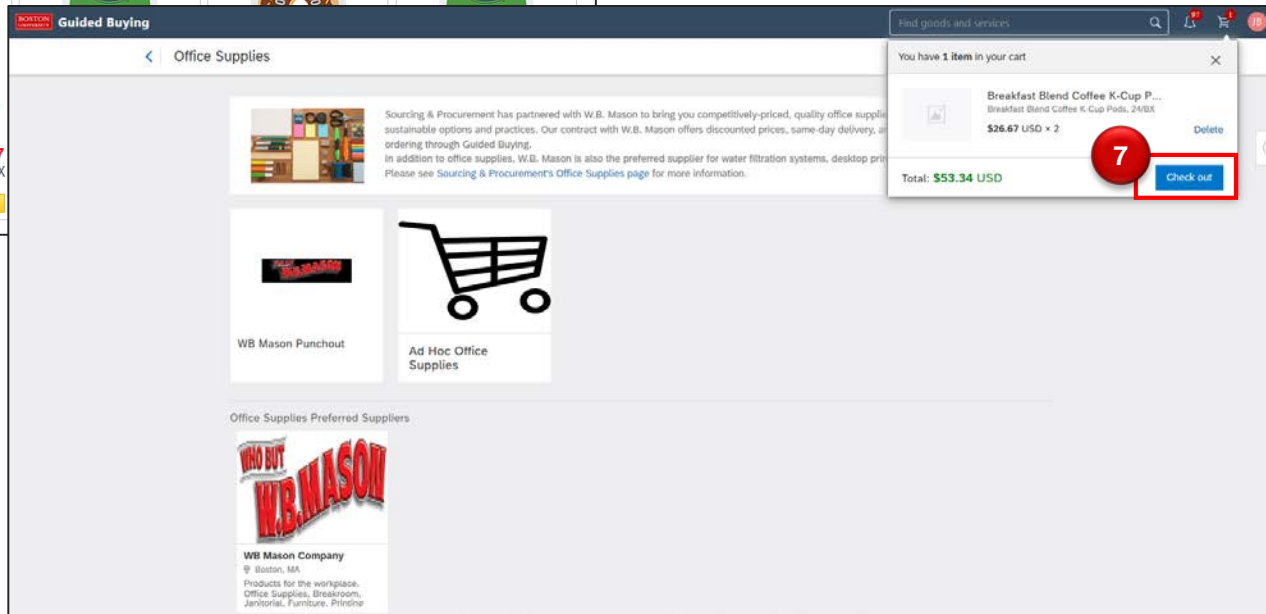
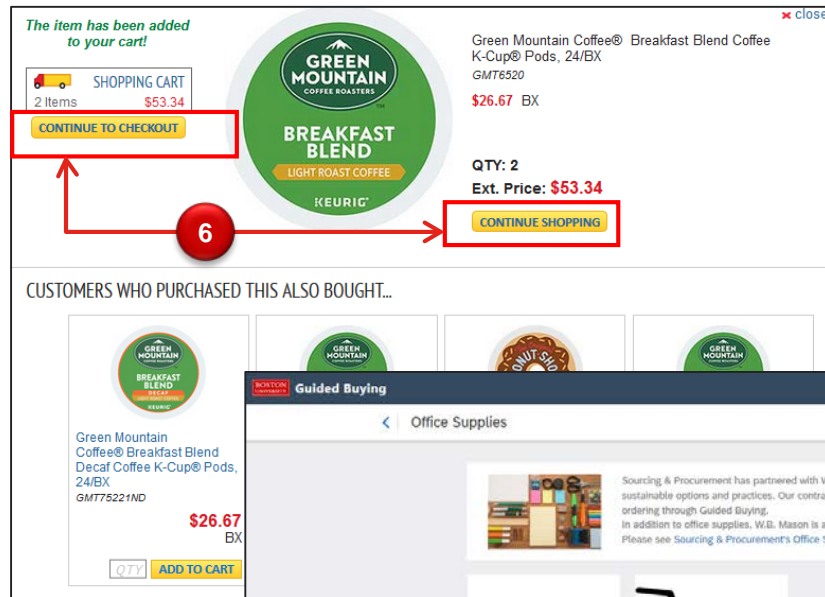
Green Mountain Coffee® Breakfast Blend
Light Roast Coffee
K-Cup® Pods, 24/BX
Availability: Next Day
\$26.67/BX
QTY: 2 | ADD TO CART

Green Mountain Coffee® Dark Magic
Dark Roast Coffee
K-Cup® Pods, 24/BX
Availability: Next Day
\$26.67/BX
QTY: | ADD TO CART

Dunkin' Donuts® Original Blend
K-Cup® Pods, 24/BX
Availability: Next Day
\$24.98/BX
QTY: | ADD TO CART

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Follow the steps to select the necessary item(s) and return the item(s) from the supplier catalog to **Guided **BU**ying** and check out.



- 6** Click **Continue Shopping** to add more items to your cart, or **Continue to Check out** if you have no other items to add to your order.

After you click **Continue to Check out** in the catalog, you will be brought to **Guided **BU**ying**.

- 7** Click **Check out** on the prompt.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Start by reviewing header information. Header information will populate based on Personal Profile*, and applies to all items in the PR.

8 Click **Manage Locations** to update the **Ship to** information.

Click **Manage details** to update the **Charge to** information.

9 Enter a **Need By Date***. The system requires a date; we suggest adding 5 days from today's date, but note it is not binding.

10 Update **Deliver To** if necessary. (e.g., John Doe Room #404).

11 Update **Requestor** if necessary.

The screenshot displays the 'Guided Buying' interface for a 'WB Mason Punchout' checkout (PR2208). The interface is divided into two main sections: 'Header Level' and 'Line Level'.

Header Level:

- Ship to:** 1 Raleigh Street, Boston, MA 02215, United States. A red box highlights this field with a callout **8** and a red arrow pointing to the text 'Click to name'.
- Charge to:** GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE)). A red box highlights this field with a callout **8**.
- Need-by Date:** A date picker field with a red box and callout **9**. Below it, a red error message states 'Need By Date must be set'.
- Deliver To:** Shopper 1. A red box highlights this field with a callout **10**.
- Requester:** JILL BROWN. A red box highlights this field with a callout **11**.
- Company Code:** TRBU (Trustees of Boston Univ).
- Total Cost:** \$53.34 USD.
- Net Amount:** \$53.34 USD.
- Is Team Requisition:** Radio buttons for Yes and No (No is selected).

Line Level:

- Items (1):** A red error message states 'This item contains missing or incorrect information.'
- Item Details:** Breakfast Blend Coffee K-Cup Pods, 24/BX. Quantity: 2 box. Price: \$26.67 USD. Net Amount: \$53.34 USD. Gross Amount: \$53.34 USD.



Note:

- Errors noted in red are required fields and must be addressed to submit the PR.
- *Personal Profile: Ship to, charge to, deliver to, and requestor flow from Personal Profile. If you are shopping on behalf of someone, settings will flow from their Personal Profile.
- Need By Date: We recommend 5 days. This is a system requirement, but does not bind a supplier to that date.
- Click the tool tip icon ⓘ to learn what needs to be entered in that field.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Review line level detail. Tabs include Accounting, Shipping, Comments, Attachments and Others.


Items (1)


	Quantity	Price	Net Amount
  Breakfast Blend Coffee K-Cup Pods, 24/BX 0010000800 (WB Mason Company)	2 box	\$26.67 USD	\$53.34 USD
			Gross Amount ⓘ \$53.34 USD


Supplier Location ⓘ
WB Mason Company
647 Summer Street Boston, MA 02210 United States


Supplier Part Number
GMT6520


Supplier Auxiliary Part ID
C-61482672|5830147607

 Accounting GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))

 Shipping ShipTo(Plant) (5004 (1 Raleigh Street))

 Comments

 Attachments

 Others

12 Click the arrow to expand at the line level. Quantity, pricing, and supplier information will display at the top. If a supplier has multiple locations (e.g. [Fisher Scientific](#)) select the correct address

13 Select the three dots to delete the line item.

14 Select the arrow next to each tab to view details and make changes.

Note:

- Errors noted in red are required fields and must be addressed to submit the PR.
- The following header information will flow to the line level: Ship to, Deliver to, Need by date, Charge to and Requestor. These fields can be edited at the line level.
- Comments and attachments can be added at the line or header level.
- Click the tool tip icon ⓘ to learn what needs to be entered in that field.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Accounting details will populate based on header information and Personal Profile.

Accounting GL Account (0000510030 (CONSUMABLE SUPPLIES - OFFICE))

Account Type
Expense

Bill To
TRBU (Boston University)
25 Buick Street Boston, MA 02215 United States

15 Account Assignment * ⓘ
K (Cost center)

16 GL Account ⓘ
0000510030 (CONSUMABLE SUPPLIES ...

Cost Center ⓘ
1471780000 (RADIO BOSTON)

17 1471780000 (RADIO BOSTON) ^
Clear selection
1202020000 (BIOLOGY)
1471780000 (RADIO BOSTON)
1511940000 (BUWorks)
Browse all

Split accounting

(1 Raleigh Street))

18 Cost Center
Description biology
1202020000 BIOLOGY Choose
2572030000 BS--MICROBIOLOGY Choose
1202020020 Biology LA Program Choose

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15 Click the drop down to select the **Account Assignment** (i.e., Cost Center, Project/WBS Element, Order).

16 The **GL Account** populates based on the commodity.

17 Click the drop down to change the **Cost Center**. History will display. Click **Browse all** to view options.

18 Specify search criteria (i.e., Description or Cost Center). Search and click **Choose**.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

PRs can be split between the same Cost Object Type (e.g., Cost Center to Cost Center) by percentage, quantity, or amount.

IMPORTANT:

If charging a cost center and a Sponsored IO#, **100% of the cost must be charged to the Cost Center**, then do a Journal Entry to charge the Sponsored IO#.

19 Split accounting

20 Split accounting type

21

Split accounting type	Amount to split	Allocated percentage	Unallocated percentage
Percentage	\$53.34 USD	100.00 %	0.00 %

Percentage	Quantity	Amount
100 %	2.00	\$53.34 USD

Invalid allocation

Cost Center (1020400003 (SOURCING & PROC))	Percentage	Quantity	Amount
50 %	1.00	\$26.67 USD	

Cost Center (1202020000 (BIOLOGY))	Percentage	Quantity	Amount
50 %	1.00	\$26.67 USD	

+ Add split

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Note: Costs can only be split between the same cost object type (i.e., between two cost centers; two internal orders; two WBS elements).

19 To split the order between cost object types, click **Split Accounting**.

20 Assign the **Split accounting type**.

21 Select the drop down next to each cost object type to assign the **Percentage** and **Cost Center**.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

View shipping details and make necessary updates.

> Accounting Cost Center (1020400003 (SOURCING & PROC))/Cost Center (1202020000 (BIOLOGY))

✓ Shipping ShipTo(Plant) (5004 (1 Raleigh Street))

ShipTo(Plant) * ⓘ
5004 (1 Raleigh Street) ✓
1 Raleigh Street Boston, MA 02215 United States

Need-by Date ⓘ
6/10/20

Deliver To * ⓘ
Erika Lonardo - Room #404

Purchase Group
103 (PGroup 103) ✓

22 Update the shipping for the line level by selecting the drop down. Previously used addresses will display. Click **Browse all**.

23 Search for the address. Click **Choose** next to the appropriate address.

Deliver To and Need-by Date flow from header level. Update at the line level if necessary.

ShipTo(Plant) * ⓘ

1000 (General Plant) ^

Clear selection

900001 (0 Carlton Street)

900018 (1010 Commonwealth Avenue)

900013 (Boston University)

900161 (Boston University)

Browse all

ShipTo(Plant)

Street buick

New

ID	Name	Street	City	State	Postal Code	Country	
5007	10 Buick Street	10 Buick Street	Boston	MA	02215	US	Choose
5168	25 Buick Street	25 Buick Street	Boston	MA	02215	US	Choose



Note: Click **New** to add an non-BU delivery address. Enter a comment noting that this is being sent to a non-BU address. The Cost Center Approver will see this as an ad hoc address and will review and provide their approval.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Add any necessary internal or external comments and/or attachments for this line. Comments and attachments can also be added at the header level.

Comments

24 Write your comment...

25 ☐ Share with supplier [Add](#)

JB JILL BROWN
5/28/20
Internal Note: This purchase was approved by the department.
[Remove](#)

JB JILL BROWN
5/28/20 [Shared with supplier](#)
Supplier-Can you please ship these items by 6/4?
[Remove](#)

Attachments

26 Drag and drop file here, or [browse](#) to upload

27 ☐ Share with supplier [Add](#)

JB JILL BROWN
5/28/20 [Shared with supplier](#)

WB Mason Orde...

Note:

***Share with supplier:** Check to share internally and with the supplier, unchecked will display internally only. Comments/attachments shared with suppliers are noted in blue.

Requirement: Orders of ≥\$10,000 require an attachment before the PR can be submitted. View the [Competitive Bid Requirements on the Policy Website](#).

24 Under the Comments section, enter **Comments** in the text box. Remove comment if necessary.

25 Check **Share with supplier*** to share with the supplier. If unchecked it will only display internally. Click **Add**.

26 Under the Attachments section, click **Browse** to upload the attachment.

27 Check **Share with supplier*** if necessary. Click **Add**.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Further information for the line item can be found in the other drop down.

28

✓ Others

Commodity Code	Material Group
SUPPLIES-OFFICE	44120000 (Office Supplies)
Item Category * ⓘ	Payment Terms
Material	Z140 - 2% 10 days, Net 30
Incoterms Code	Incoterms Location
Free On Board	
Purch Org	Line Item Text ⓘ
1000 (Sourcing & Procurement)	
Contract ⓘ	Order Type *
(no value)	Standard

28

Expand the **Others** section. Review other details for the product.

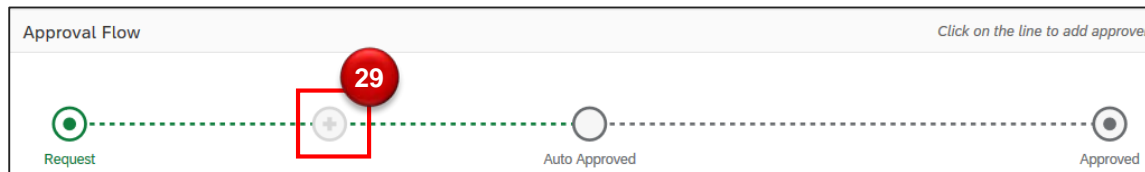
Contract: Certain items are associated with BPO contracts.

Order Type: For Ad Hoc Requests, select **Standard** or **Amount Based** for time and materials when you do not know the total amount to be spent. **Do not change this for catalog orders.**

Moveable Capital Equipment: When purchasing moveable capital equipment, use the CAPITAL – MOVEABLE commodity code to add Property Management to the approval automatically. More information can be found on the [Sourcing & Procurement website](#).

Purchase Requisition Generation via Guided BUying Catalog Order

View the approval flow. System generated approvers cannot be removed. Add an approver/watcher to the workflow if necessary. Watchers can view requests, but no action is required. Approvers must approve requests before they can move forward.



Add Approval Request

Add this approval request as ☒ Approver ☐ Watcher

Provide a reason: Optional

Email Address bacci

Email Address	Name	ID
mbacci@bu.edu	MARY BACCI	MBACCI

Choose

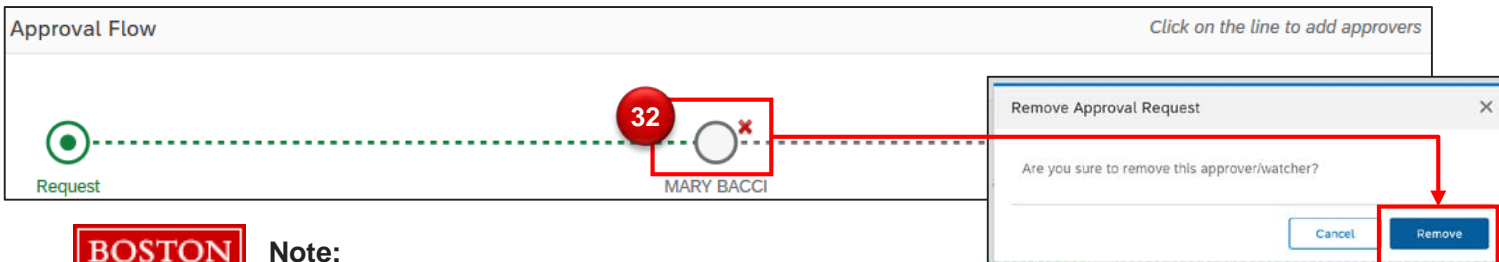
Cancel OK

29 Hover over the approval workflow and click the + icon where you want to add an approver/watcher.

30 Click the radio button next to **Approver** or **Watcher**.

31 Search and click **Choose** next to the appropriate name. Click **OK**.

32 **Removing Approver/Watcher:** Click the remove icon next to the name to remove. Click **Remove**.



Note:

- Add watchers if other team members need to see your PR, but their approval is not required.
- Only added watchers/approvers can be removed.

View updated approval workflow.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

When you are ready, click the three dots to validate request before you click **Send Request**. Once submitted, the first approver in the workflow will receive the request.

WB Mason Punchout
Checkout / PR2208

Total Cost **\$53.34 USD**

Contract (no value) Order type Standard

33 Send request Save and exit Validate

Comments

Write your comment...

☐ Share with supplier Add

Attachments

Drag and drop file here, or [browse](#) to upload

☐ Share with supplier Add

Approval Flow *Click on the line to add approvers*

Request Auto Approved Approved

[Continue shopping](#)

33 Once review is finalized and all required fields are completed, click the symbol to validate and check for errors.

Resolve any errors and click **Send Request**. The request will move to the first approver in the workflow.

Other Actions:

- **Save & exit:** To save and finish PR later. Saved PRs can be viewed under the **Your Requests** tab.
- **Continue shopping:** To add additional items.

Purchase Requisition Generation via Guided **BU**ying Catalog Order

Once submitted, you will receive a confirmation on the screen and via email. Next, the first approver in the workflow will receive the PR.

Submitted

Approval Flow Click on the line to add approvers

Request — BUWTH — Success — Approved

Success

Your requisition has been sent for approval.

Comments

Write your comment...

34 Done View requisition

35

Shop Your Favorites Your Requests Approvals

General Goods & Services Campus Planning & Operations Marketing & Advertising

Request ad hoc item +

Request on behalf of

Recent requests

PR645 Submitted

Fisher Scientific Punchout Catalog

\$2,317.30 USD

Requested 0 days ago

PR643 Composing

Fisher Scientific Punchout Catalog

\$0.00 USD

34 View confirmation. Click **Done** or **View Requisition**.

35 You will receive an email notification when the PR is approved.

Alternatively, navigate to the **Your Requests** tab on the homepage of **Guided **BU**ying** to view previously placed PRs and their statuses.

Next Steps:

- You will receive an email notification if the PR is approved. Once a PR is approved, it automatically generates a PO.
- If the PR is not approved, the requisitioner will need to modify and re-submit.
- Navigate to the **Your Requests** tab on the homepage of **Guided **BU**ying** to view previously placed PRs and their statuses.