Shopper: Selecting Items from Hosted 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. On the Marketplace home page, select an item from a Hosted Supplier Catalog using the search function by clicking on the Supplier's button to open a Search Box specific to that Supplier.

4. Enter a description of the item or its catalog item number if you wish to place it in your cart, and then click on the **Search** button.
5. A list with all the items matching your criteria will appear in the Duke Marketplace window rather than in a separate supplier website.

6. Review the functions across the top and along the left side.

7. In the left-hand sidebar, add keywords to your search by entering the words and clicking on the Go button. In this example, using “glass” as keyword reduced the original list from 1401 items to 10 items that include the word “glass” in their descriptions.

8. In the Filter Results box, narrow or broaden the list by clicking on the various search criteria: Category; Packaging UOM (Unit of Measure); Result Type; or Manufacturer Name.

9. Click on the funnel icon to view the criteria list.
10. Click in the box next to the items you wish to include as filter criteria.

11. Click on the **Filter** button and review the resulting list.

12. 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.

13. To add an item to a **Favorites folder**, select it from the list and click on **Add Favorite** to open the Favorite window. Using favorites will save time by eliminating searches for specific items you order on a regular basis.
14. To create a folder, which must be done the first time you add a favorite, click on the **New** button and select **Top Level Personal Folder**.

15. When prompted, **enter a name for the folder** and an optional description. Then click on the **Save** button.

16. Once the folder is created and saved, click **Submit** to actually add the product to the newly created Favorites folder.
Note: In the future, you may begin your shopping cart by going directly to the Favorites folder, bypassing the various search functions.

17. Click on the **Close** button.

18. Notice that the item you placed in your Favorites folder now has a star in its listing.

19. To place items in the cart, review the list of items, select the specific item, and click on the **Add to Cart** button.

20. Whenever you wish to view the entire cart, click on the **cart name at the top right**. When you click on the cart name you will lose the current Search list.

21. To return to either the Hosted Supplier or Punch-Out Supplier catalogs, click on the **Home/Shop** page.

22. To conduct a search for an item using Hosted and select Punch-Out catalogs (marked with an asterisk *), enter the item description in the **Shop Hosted Catalogs** box and click on the **Go** button.
23. Once the list appears, notice the **By Supplier** list in the left sidebar.

24. Click on the **More** button to see the entire list.

25. Narrow your search by selecting criteria or begin searching the entire list of items.

26. Note that items from a Hosted Supplier Catalog will have the **Add to Cart** button in their boxes.

27. Note that items from Punch-Out Supplier catalogs will have an **Order from Supplier** link in their boxes.

28. Once you’ve added all the items you wish to place in your cart, review the cart by clicking on its name in the top right corner.

29. If you have finished shopping, click on the **Finish Shopping** button to return to the **Create Shopping Cart** page in the Buy@Duke website.

30. If you wish to add **Attachments** or **Notes** to the items in your cart, follow steps 32-35 below. **Some purchases require Attachments and Notes.** If you will not add these, proceed to step 41 to complete your cart.

31. If your department requires you to enter a Cost Object and G/L Account for the items in your cart follow steps 36-40 below. If not, proceed to step 41 to complete your cart; the financial codes will be entered by your Submitter at a later time.
Shopper: Adding Notes and Attachments to a Shopping Cart

32. Any quotes or other documentation received from suppliers should be referenced in the **Notes** section and attached to the shopping cart in the **Attachment** section. These fields are row specific.

33. Access the note option by clicking on the number in the **Notes** column of the line item or on the number in the **Line Item** column. This will open the Details section below the Item Overview. Two types of notes may be recorded with the cart:

- **Internal Notes** are intended for communication within Duke only. The notes are not visible on purchase orders sent to suppliers. Use this field for justifications, order notes, and other internal purposes.
- **Supplier Text** should be used to communicate details about the order with the supplier. The text will appear on the purchase order when it is sent to the supplier. This field could include reference quote numbers, promotional codes, detailed descriptions for item ordered, lot numbers, and other supplier-specific information.

34. Attach any supporting documentation to the cart by clicking on the number in the **Attach**. Column or on the number in the **Line Item** column. This will open the Details Section below the Item Overview.

35. Click the **Add Attachment** button to open the Add Attachment window. Use the **Browse** button to search for the file you wish to attach. Once file is selected, click **Open**. Enter a description to help identify what is attached. Check or uncheck **Visible Internally only** as needed. When checked this indicates attachment should not be shared outside of Duke. Repeat for each attachment.
Shopper: Assigning Financial Information to a Shopping Cart

36. To enter the financial information, scroll over to the **Account Category** column and select the appropriate **Cost Object** from the drop-down list.

<table>
<thead>
<tr>
<th>Line Number</th>
<th>Description</th>
<th>SAP Material</th>
<th>Location</th>
<th>Cost Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Item 1</td>
<td>001222</td>
<td>001222</td>
<td>001222</td>
</tr>
<tr>
<td>2</td>
<td>Item 2</td>
<td>001223</td>
<td>001223</td>
<td>001223</td>
</tr>
<tr>
<td>3</td>
<td>Item 3</td>
<td>001224</td>
<td>001224</td>
<td>001224</td>
</tr>
</tbody>
</table>

37. Click into the **Account Assignment** field and enter the Cost Object.

38. Tab into the **G/L Account** column and enter the appropriate account.

39. Then press the **Enter** key on your keyboard.

40. Follow steps 36-39 for remaining line items.

41. Next, regardless of whether you entered financial information, notes, or attachments, click the **Check** button.
42. Review the white box at the top for any messages and take action as follows:
   • If you entered financial information and see error messages related to Account Assignments, make the corrections.
   • If you did not enter financial information, you may ignore the financial error messages as your cart Submitter will make the financial account assignments.

43. Follow any other instructions you see in the white box.

44. You may add more items to the Duke Marketplace shopping cart by:
   • Selecting items from another Hosted Catalog; or
   • Selecting items from a Punch-Out (Supplier) Catalog; or
   • Adding Non-Catalog (Text) items.
   Follow the steps outlined elsewhere in this document.

45. To save the cart, click the **Save** button. Notice that the Status indicator will change to Saved with a date and time stamp. You may return to the cart later to add other items or change other information.

46. If you wish to notify your Team Members (Purchasing Substitutes) that the cart is saved, click the **Notify** button and select **All Team Members** from the menu. This action will also save the cart, making the Save action above redundant.

47. If you have completed the cart and wish to notify your Submitters that the cart is ready for their review, click the **Notify** button and select from the menu either:
   • **Submitters** to notify all your Submitters; or
   • the email address of just one Submitter to notify only him or her.
   This action will also save the cart, making the Save action above redundant.

48. Close your browser.