

Updating Accounting and Shipping at the Header

Updating Accounting and Shipping at the Header

Within **Guided BUYing**, Requisitioners can set shipping at the line-level or header-level

Setting Address at Header-Level vs. Line-Level:

Header-Level: The **Ship To** and **Deliver To** fields should be set at the header-level for PRs when all lines are being shipped to the same address. Deliver To at the line level **does not** update the header-level. Thus, it's important to set the **Ship To** and **Deliver To** at the header-level if shipping to one location. If you are purchasing from a catalog supplier (e.g., WB Mason), set the delivery address at the header level. If you need to send the order to multiple addresses, create separate PRs for each address.

Line-Level: If you have multiple lines with different **Ship To** addresses, set the **Ship To** and the **Deliver To** at the line level. To avoid delivery delays, please ensure your **Deliver To** is populated or you risk your package being returned to the Supplier.

Updating Accounting and Shipping at the Header

At checkout, information from your personal profile will populate. Changes to the **Ship to** and **Charge to** can be modified at the header level.

The screenshot shows the checkout header for a 'Microscope' (PR14380). It includes a 'Ship to' section with a 'Manage locations' link highlighted by a red box and a red circle with the number '1'. The 'Charge to' section has a 'Manage details' link. The 'Total cost' is \$5,000.00 USD, and the 'Net amount' is also \$5,000.00 USD. A 'Show additional details' link is at the bottom.

The 'Manage locations' dialog box shows a list of shipping addresses. The first address, '5037 (120 Ashford Street)', is highlighted with a red box and a red circle with the number '2'. Below the list is a 'Browse all' link, also highlighted with a red box and a red circle with the number '2'. The dialog also includes a 'Deliver To' field with 'ELonardo, Floor 1 #120' and a 'Purchase Group' dropdown set to '103 (PGroup 103)'. A yellow warning message at the top states: 'The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.'

- 1 **Shipping at Header Level:** Click **Manage Locations** to update the **Ship to** information.
- 2 Update the **Ship To** for the header level by selecting the drop down under **ShipTo(Plant)**. Previously used addresses will display. Click **Browse all**.

Updating Accounting and Shipping at the Header

Update the search criteria from **ID** to **Street** or **Name** and search for the appropriate address. After selecting the address, enter a **Deliver To** including name, floor, and room number.

ShipTo(Plant)

Street ▾ buick

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

Manage locations

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

Shipping

ShipTo(Plant) * ⓘ
5007 (10 Buick Street)
10 Buick Street Boston, MA 02215 United States

Deliver To * ⓘ
ELonardo, Floor 2 #34

Need-by Date ⓘ
2/15/21

Purchase Group
103 (PGroup 103)

Shipping items to different locations?

Done

3 Change search criteria from **ID** to **Street** or **Name**.

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

View updated address.

5 Update **Deliver To** including name, floor, and room number. We recommend using abbreviations as certain suppliers can only accept 30 characters in this field.

Click **Done**.

Updating Accounting and Shipping at the Header

Select **Manage details** to updating **Accounting** information.

Ship to	Manage locations	Charge to	Manage details	Total cost	\$5,000.00 USD
10 Buick Street Boston, MA 02215 United States		Cost Center (1471780000 (RADIO BOSTON))		Net amount	\$5,000.00 USD
▼ Show additional details					

Manage details

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

Charge to

Account Assignment * ⓘ

- K (Cost center) ^
- K (Cost center)
- P (Project)
- F (Order)

Account Type

Expense

GL Account ⓘ

0000571410 (NON-MOVEABLE CAPITAL ... v

Cost Center ⓘ

- 1471780000 (RADIO BOSTON) ^
- Clear selection
- 1202020000 (BIOLOGY)
- 1020400003 (SOURCING & PROC)

Browse all

Done

6 **Accounting:**
Click **Manage details**.

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

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

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

Updating Accounting and Shipping at the Header

Select the appropriate accounting information. After updating accounting and shipping, make any other necessary changes before submitting the PR.

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

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

View updated accounting information.

11 Click **Done**.

The changes that you make here apply to every item in the shopping cart. Please note that when changing the value of a field, the change is automatically saved.

Charge to

Account Assignment * ⓘ
K (Cost center) ▼

Account Type
Expense ▼

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

GL Account ⓘ
0000571410 (NON-MOVEABLE CAPITAL ... ▼

Cost Center ⓘ
1202020000 (BIOLOGY) ▼

Changing accounting details for specific item(s)?

11 Done