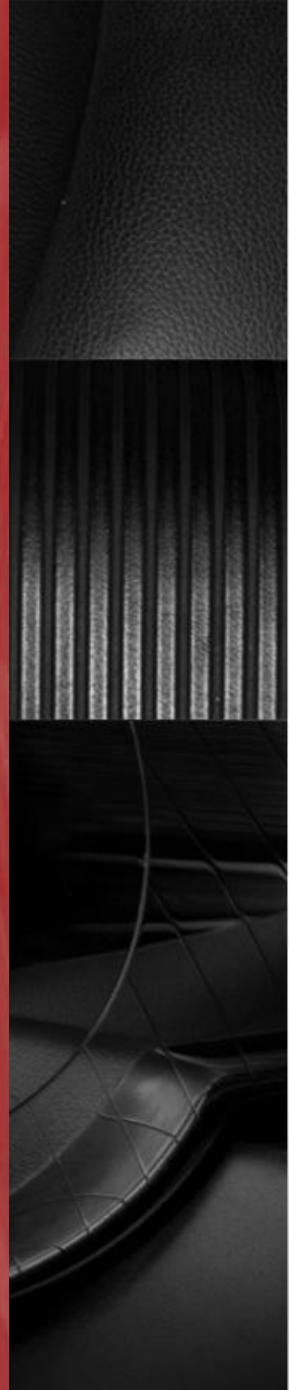


# Long Lead Time Orders for Fiscal Year 18 Process

Procurement Services





## PLACING LONG LEAD TIME ORDERS IN SMART SOURCE

- You may have a need to place an order that will be allocated to Fiscal Year 18's budget but is required to be delivered in early July 2017. Due to the long lead time required to fulfill your order, you can place your order now through Smart Source and have it charged and delivered in Fiscal Year 18.
  - Examples include furniture, equipment, etc.

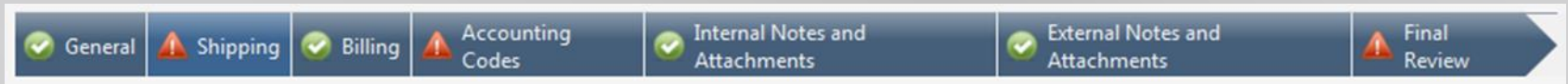
You need to set up a new office by mid July but the furniture will take 8-10 weeks to arrive.

## PLACING LONG LEAD TIME ORDERS IN SMART SOURCE

- Select the appropriate form for your type of purchase (Non-Catalog, Sole Source, etc.)
- Once you have added your order to your cart, you will proceed to checkout
  - Click on your cart and select **Checkout**

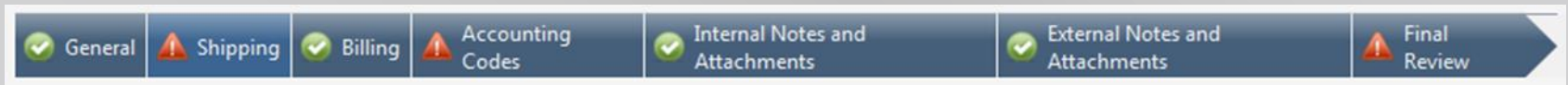
The screenshot displays the Smart Source Procurement Services interface. At the top left is the Drexel University logo and the text "Smart Source Procurement Services". The top right shows the user name "Michele Arias", a star icon, a notification bell with "87", and a shopping cart icon with "6,000.00 USD" circled in red. A search bar with "Search (Alt+Q)" is also present. Below the header, a breadcrumb trail reads "Shop > Shopping > Shopping Home > Home/Shop". A search bar contains "Shop Everything". At the bottom left, there are links for "Go to: advanced search | favorites | forms | non-catalog item | quick order" and "Browse: suppliers". On the right, a "My Cart" sidebar shows the order details: "FY18 Furniture Order for New ...", "Quantity: 1", and "Price: 6,000.00 USD". It includes a "View My Cart" button and a "Checkout" button circled in red. The cart total "6,000.00 USD" is displayed at the bottom right of the sidebar.

## PLACING LONG LEAD TIME ORDERS IN SMART SOURCE



- You will complete the checkout process as usual with the following exceptions:
  - In the Billing section, you will need to update the accounting date to July 1<sup>st</sup>, 2017
  - In the External Notes and Attachments section, you will need to enter an external note to the supplier

# UPDATING THE ACCOUNTING DATE



- In the Billing Section:
  - Select the Edit button next to Billing Options: Accounting Date
    - Select July 1<sup>st</sup>, 2017

**Billing** ?

These values apply to all lines unless specified by line item

**Bill To**

Billing address      PROCUREMENT SVCS A/P  
Drexel\_University@edmamericas.com  
US MAIL:  
PO BOX 42485  
PHILADELPHIA, PA 19104  
United States

No credit card has been assigned.

**Billing Options**

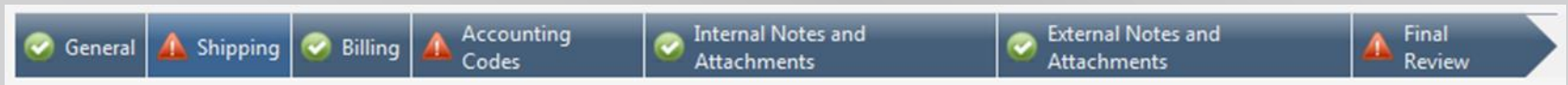
Accounting Date      no value

**Billing Options** ? X

Accounting Date      07/01/2017

mm/dd/yyyy

## ADDING AN EXTERNAL NOTE FOR SUPPLIER



- In the External Notes and Attachments section:
  - Select the Edit button next to Note to all Suppliers and enter the following note
    - **“This is an order for FY18. All goods/services must be shipped for receipt after Friday, June 30, 2017. We will refuse early deliveries.”**

**External Notes and Attachments** ?

These values apply to all lines unless specified by line item

Note to all Suppliers *no note* **edit**

Attachments for all suppliers

**Size**   **Attached on**



## PLACING LONG LEAD TIME ORDERS IN SMART SOURCE

- Once you have completed the checkout process including updating the accounting date and the external note to the supplier, you can then submit your requisition.