Placing Orders in Lupin Proceedo

Contents

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How do you create an order?

Start by looking in the agreement register (Kommers) where you can find information on the contracts we have in place and the suppliers you can buy from. It also contains information on the terms of the contract and how to place your order.

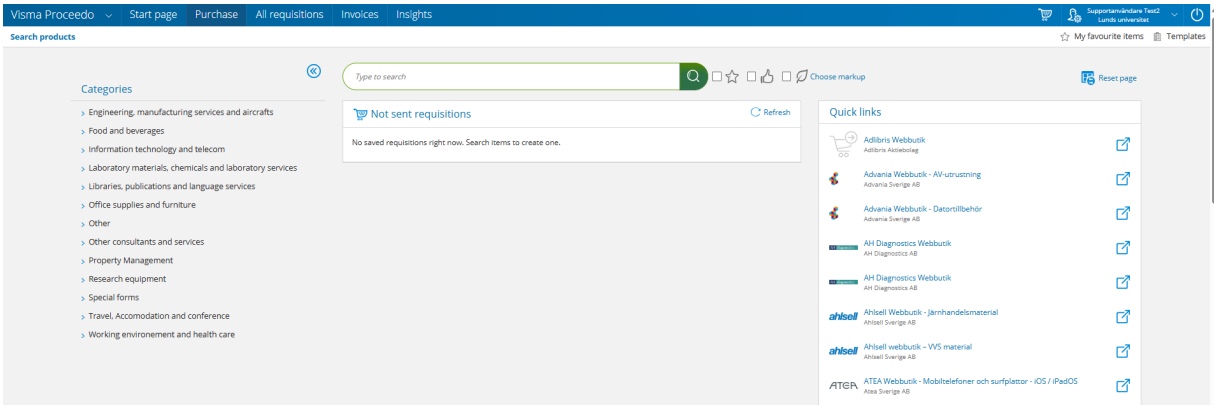
The purchasing process in Lupin/Proceedo consists of the following steps:

1. Order created
2. Order approved by the approving officer
3. Order automatically sent via the system to the supplier
4. Delivery confirmed following delivery
5. Invoice must be dealt with if it does not match the order

As the person placing the order, you are involved in steps 1, 4 and 5 and delivery must be confirmed so that the order and invoice can be matched. If the invoice matches your order exactly, you should not have to handle the invoice.

Navigate the purchasing process

To start your order, click on the **Purchase** tab. You can then search for the desired products via the categories overview on the left or the search field in the centre. The ordering procedure may vary depending on the contract supplier you are ordering from.



The categories overview displays the current contract categories. Click on the relevant category to expand the categories overview and to see any subcategories.

If a category is selected, you will only see results from that category when searching.

You can search using one or more keywords or within a specific category.

You can also tick the thumbs up box to find reasonably priced items or the leaf box to limit the selection to certain eco-labels.

Different options for ordering products in Lupin/Proceedo

Catalogue products in uploaded catalogues are displayed directly in the search list and are searchable in Lupin/Proceedo.

Online shops (punch out): These can be accessed by searching for the supplier name and the word webshop. The products in the webshop are not directly searchable in Lupin/Proceedo, you have to go to the webshop ("Open webshop") to search. The products are added to the webshop's shopping cart and then transferred to Lupin/Proceedo where the order is finalised.
You can find all the web shops to which you have access under Quick links in the top-right corner of the Purchase tab.

Free text form linked to supplier: On the form, you fill in information about price, unit, etc. yourself, often after dialogue with the supplier. Search for the supplier name and “free text” in the search field to find the form for a specific supplier.

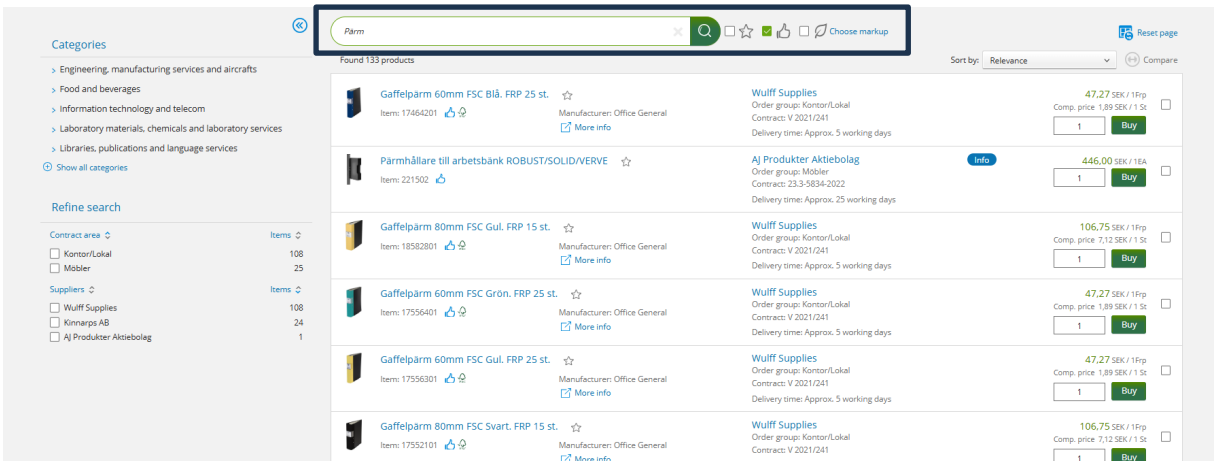
Free text order form for placing orders to suppliers not available in Proceedo: On the form, you fill in information about price, unit, ordering address, etc. yourself, often after dialogue with the supplier. Please note that you will need to enter the

email address to which the order should be sent. Contact the supplier to make sure that the order is sent to the correct email address. This form is available in Swedish and English. You can find the forms under Quick links in the top-right corner of the Purchase tab.

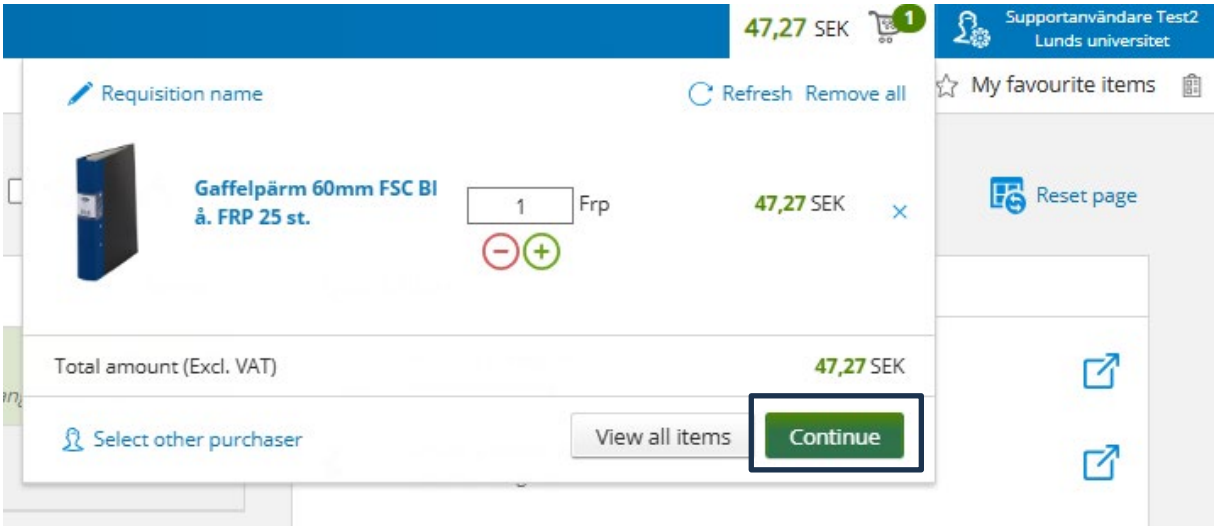
Requisition is only used when what you need to buy is not included in any contract and it has to be bought in a physical shop. If you use this option, you will receive an approved requisition to take to the shop. Remember to print out the requisition.

Add products to shopping cart

You can find your product by searching for it or, if you know which category to shop in, it is better to find it in the categories overview on the left of the page.



Once you have found the right product, select **Buy** and the product will be added to your shopping cart. Select **Continue** to proceed.



Change your shopping cart and set account code

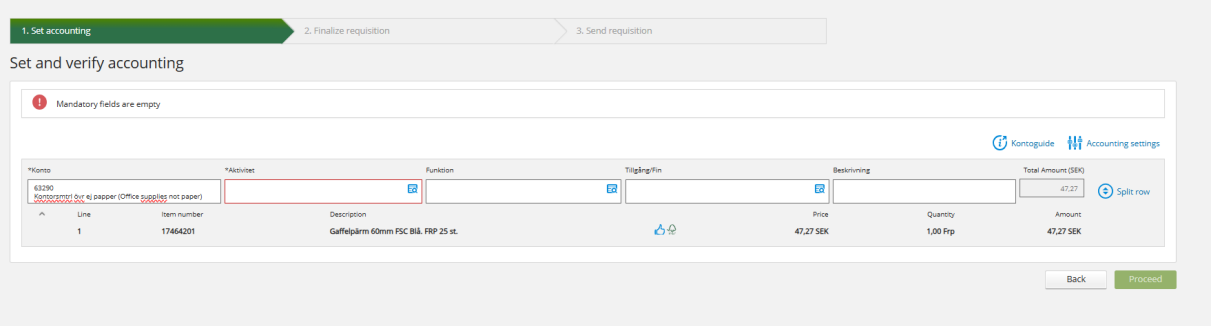
In the shopping cart, you can name the order, change the quantity and delete items (NB: if you make a purchase via an external web shop, the quantity cannot be changed in the shopping cart; you will need to add another product from the web shop). The name of the order will not be sent to the supplier but is there to clarify what the order is for internally.

You can increase or decrease the number of products by clicking on - *or* +. You can remove products by clicking on the x. Click on **Continue** to proceed.

Tip:
If you are a support user, you have the option of ordering on behalf of another user. ***Select other purchaser*** *means that the delivery confirmation and the invoice will be sent to the orderer you have selected.*

Set account code

As the person placing the order, you must always specify the account and activity for your order.



Tip:
You can search for values using both text and numbers.

If you have not done so already, select your favourites – the accounts and activities you use most. Options marked as favourites are displayed at the top of the selection list. If you have marked a value as default, this is entered automatically. You can only have one default value. This is recommended if you always use the same account code. It is possible, however, to have several favourites.

Konto (Account)
Specify what the purchase is for. For some items, you will receive suggestions for an account, so it is important to check that the correct account has been suggested. If it is the wrong account it can be changed.

Aktivitet (Activity)
Specify the activity that will bear the cost.

Beskrivning (Description)
Specify what the purchase is for. The text is included as a verification text in our financial system and helps our accountants understand what the purchase is for.

Optional fields are used as follows:
Funktion (Function)
To divide costs into more levels than just activity.

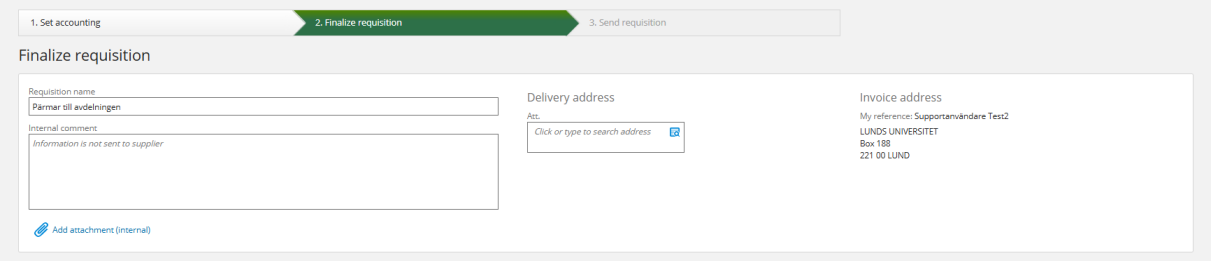
Tillgång/Fin (Asset)
If the purchase refers to an asset prone to theft that is to be listed in the holding register, select value 999, only in combination with account number 63* or 64*.

If you have previously ticked the default values in your account code, the system will enter these automatically and skip the Set accounting step. To change a default account code, click back to step 1. Set account code.

Click on Proceed to complete your order.

Finalise the order

Once you have completed your purchases and filled in the account code, send your order for approval. Once approved by the authorised approving officer, it will be sent to the supplier.



Order name
If you have already named the order in the shopping cart, this field is already filled in. It is a good idea to name the order as it is easier to track your orders. The order name can contain a maximum of 40 characters.

Internal comment
This is where you, as the person placing the order, specify the purpose of the order. It can help the approving officer to know the purpose of your purchase. The text is not forwarded to the supplier. The text field can hold up to 1,000 characters.

Delivery address
Fill in your delivery address.

Tip: You can enter a default address that will be automatically added at the next order. You can also add favourites, in which case those addresses are displayed at the top of the list and are easy to find.

You cannot change the invoice address; it is always locked as it is always the same.

Register new delivery address: If you are looking for a frequently used delivery address within Lund University and cannot find it, please contact the Division of Finances using the support form so we can add it.

Notifications

You can leave a comment for the supplier. You can enter up to 1,000 characters in the field. The message then appears on the order to the supplier.
A few suppliers are unable to receive this message. In these cases, we have disabled the field.

Insert goods labelling

Some suppliers can label their parcels, in which case please enter the desired labelling in the field.

Review invoice

If you want to review the invoice, even if everything matches the order, there is a function called *Review invoices for this order.*

Send order

When you click on “Send requisition”, the order will be sent to the approving officer. The approving officer can approve or reject the order.

Once the order is approved, it is sent to the supplier.

You will receive an email notification from Proceedo so that you know the status of your order.

If you created a requisition or used a free text order form for placing orders to suppliers not available in Proceedo, print the order and take or email it to the supplier.

An order can be cancelled in the system as long as it has not been sent to the supplier. Once the order has been sent, it is the supplier who should be contacted to cancel the order.

Rejected order

You can easily reuse a rejected order and correct, add or remove items. Locate the order and click on it. Click on **Use as template**. The products are then added to your shopping cart. Go to the shopping cart, click on **Continue** and make any changes.

Support

If you have questions about purchasing and ordering, please contact the Division of Finances via the support form.