Submitting an Order
Quick Reference Guide

CART OVERVIEW
Items that you wish to order are initially put into a Cart where you define your products, quantities, ship to address, and accounting fields. Once your Cart is submitted into workflow, it becomes a Purchase Requisition (PR).

1. When you have finished shopping, click the View My Cart icon at the top right of the page followed by to access your active cart.
2. Each cart icon will look different, updated with the dollar total in the cart.

EDIT CART
The first screen you see when clicking into your cart is the Edit Cart page:

Here you can update the Cart Name and description for your cart. To update the quantity of an item, change the value in the Quantity field, and click Update.

When you have finished making all necessary changes, click Proceed to Checkout.

REVIEW CART
It is on the Review Cart page where you will enter the ship to address, accounting codes, and make any other changes prior to submitting your cart for approvals.

SHIP TO ADDRESS
The Ship to address is a required field on all carts. To update the Ship to address:

1. Click the Want to use a different address? link underneath the Shipping Address field.
2. On the tab, click the Select Addresses for Profile button.
3. From the drop-down menu, select Central Receiving, and then enter your name, building, and room number.
4. Verify the information that appears is correct, and if not, make any necessary changes, and then click Save.

ACCOUNTING CODES
You can assign accounting codes to the entire cart or individually to each line item. The Fund, Organization, Object, and Project fields are required.

1. To assign account codes, click on the link at the top of the page.
2. Below the Shipping address section in the Accounting Codes section, click the edit button.

3. Under Fund, click the Select from all values... link to choose the appropriate value from the drop-down menu.
4. Follow a similar process to search for and select the Organization, Object, and Project values.
5. Click Save when all values have been entered.

To update the account codes for each line individually:

1. Click the button next to each line item.
2. Follow the instructions above to update the account codes for each line item.

REQUISITION APPROVALS
Based on the contents of your cart, each line item cost, the total PR cost, and the accounting code values, your cart will be subjected to one or more approvals before becoming a Purchase Order. To see what approvals your cart is subject to:

1. Prior to submitting your cart, click the tab.
2. You’ll see a diagram with future workflow steps similar to this one:

PLACE ORDER
Once all required fields have been completed and verified, click to submit your requisition for approval. Your cart is now a Requisition and the system will provide you with a Requisition number that can be used to track the progress of the requisition through the approval process.