The **Proceed to Checkout** button is available to Shoppers and Requestors but the next steps in the workflow differ slightly.

**For Shoppers**, it will allow them to enter further details in their cart, such as CoA, Requisition Description or Business Purpose, and Standing Amount Based PO checkbox. They will then be prompted to **Assign Cart**, which routes the cart to a Requestor.

**For Requestors**, it allows them to enter all required details and then **submit** the request into the approval workflow.

1. Navigate to the **Summary** tab. Use the scroll bar on the far right *(to the right of the approval workflow section)* to navigate through and review the following sections:
   - General
   - Ship to & Bill to
   - Accounting Codes
   - Internal Notes and Attachments
   - External Notes and Attachments
   - Special Handling & AP
   - Ad Hoc Approver
   - Line Items

2. Scroll down to **Accounting Codes** to update the COA. You can also click the **eye icon** in the top right to filter the **Summary** tab to **View Accounting Codes Only**.
   - Click the **pencil icon** to edit
   - Enter the codes for each segment of the string. Click the **magnifying glass** to search values. Click the **blue arrow** to access any COA segment favorites.
   - Click the **add split (+) icon** to add another code for split costing. **Further details on splitting costs are outlined on page 2 of this guide.**
   - Click the **check icon** to validate the COA. Click the **heart icon** to access favorites.
   - Click **Save Changes** when the costing string is complete.

3. Accounting information can **vary by line** as well* (see special note on page two). Scroll down to the line items section or click the **eye icon** in the top right and select **View Line Items Only**.

   Click (...) at the line level and select **Accounting Codes** from the menu to edit line level COA details.

4. Navigate to **Attachments** to review attachments:
   - Internal notes and attachments are for internal use (Approvers, Accounts Payable, etc.) and are not sent to the Supplier
   - External notes and attachments are for the Supplier, and will be included as part of the purchase order

5. When you are done reviewing and editing the request, go to the workflow section on the right where the buttons you see depend on your role:
   - **Shoppers** should assign the cart to a Requestor.
     See the **Assigning a Cart** guide for more information.
   - **Requestors** can:
     - **Validate Accounting Segments** to confirm the CoA coding
     - **Submit Request** into the approval workflow
     - **Assign Cart** to another Requestor

**Note for Requestors**: the **Validate Accounting Segments** button should be used to validate your coding prior to submitting. This will prevent a cart being auto-returned for having an invalid code. You can validate accounting segments anytime during the checkout process.

6. A confirmation message will appear that your cart has been assigned (for Shoppers) or requisition has been submitted into workflow (for Requestors). The **Proceed to Checkout** button is available to Shoppers and Requestors but the next steps in the workflow differ slightly.

   - For **Shoppers**, it will allow them to enter further details in their cart, such as CoA, Requisition Description or Business Purpose, and Standing Amount Based PO checkbox. They will then be prompted to **Assign Cart**, which routes the cart to a Requestor.
   - For **Requestors**, it allows them to enter all required details and then **submit** the request into the approval workflow.

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**Checkout Process**

09.21.22
Checkout Process – add split options

This section provides further detail on how to use **add split** to split a line item across CoAs.

You can use **add split (+) icon** to add multiple lines.

### % of Price

When you select **% of Price** you can split the cost by indicating the percentage you want to allocate to each split line.

Click the **recalculate/validate (check) icon** to see the corresponding dollar amounts.

To edit the percentages, enter new numbers in the fields and click **recalculate/validate**.

**Note:** you can enter up to four decimal points in the percentage amount to achieve the level of precision you require. Click **Save** to apply the splits.

### % of Qty

The **% of Qty** option allows you to split the cost across CoAs based on the quantity of your order. You can view the corresponding dollar amounts and recalculate your allocations with the same steps as for **% of Price** above.

**Note:** you can enter up to four decimal points in the percentage amount to achieve the level of precision you require. Click **Save** to apply.

### Amount of Price

The **Amount of Price** option allows you to directly specify a dollar amount to be applied to each split.

Click the **recalculate/validate (check) icon** to calculate the split total and ensure it matches.

**Note:** Approvers will see the % allocation of requisitions with amount-based splits, not the dollar amounts as seen by the Requestors. However, the dollar amount is included in the email notification sent to Approvers.

*Special notes regarding header account coding vs line level account coding*

Account coding at the line level will ALWAYS take precedence over header level account coding.

When copying orders from previous requisitions, Users should pay special attention to this. Changing the account coding at the header level will not change any account coding at the line level that came with a copied cart. If there is coding at the line level, always make sure it is the proper coding, as it will be the coding used when an invoice is processed. If there is no coding at the line level, then the header level coding will be applied to that line.