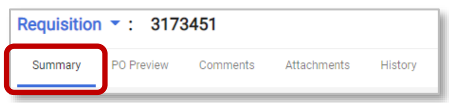
Checkout Process

From the **Cart**, the **Proceed to Checkout** button takes you to the checkout screen/process.

- For Shoppers and Requestors, this screen will allow entry of all standard (some required) details of the requisition, such as the Chart of Accounts, description/business purpose, shipping address, standing/amount based PO option, external comments, etc.
- While both Shoppers and Requestors will see the Submit Request button, Shoppers should only submit carts containing the supplier eShip Global, and Requestors can submit any suppliers (but no supplier can be combined with an eShip Global order).

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 Chart of Accounts. Click the **pencil icon** to edit

Accounting Codes

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root
520	45300	*no value*	*no value*	556010	2008-556010	*no value*

   a. 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.

Accounting Codes

Tub	Org	Object	Fund	Activity	Subactivity-Activity	Root
520	45340	6600	225331	387735		65519

   c. Click **Save Changes** when the costing string is complete.

3. Accounting information can <u>vary by line</u> 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 **<u>Accounting Codes</u>** from the menu to edit line level COA details.

	Item	Catalog No.	Unit Price	Quantity	Ext. Price
1	Widgets	12345	30.00	25 EA	750.00

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

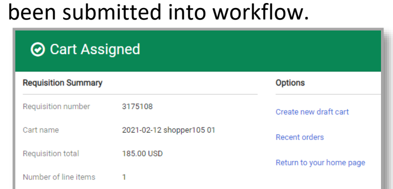
5. When you are done reviewing and editing the request, go to the workflow section on the right where you will see the Assign Cart and Submit Request buttons.

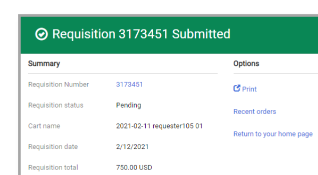
<u>Shoppers</u> should only submit requests for eShip Global as a supplier. For all other supplier orders, shoppers must assign a cart to a requester to submit on their behalf.

<u>Requestors</u> can submit requests for any supplier or combination of suppliers in a cart. (One exception, eShip Global orders cannot be combined with any other supplier in a cart. They must be submitted as the only supplier on that request.)

The **Validate Accounting Segments** button should be used to validate your coding <u>prior to submitting</u>. 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 or requisition has been submitted into workflow.

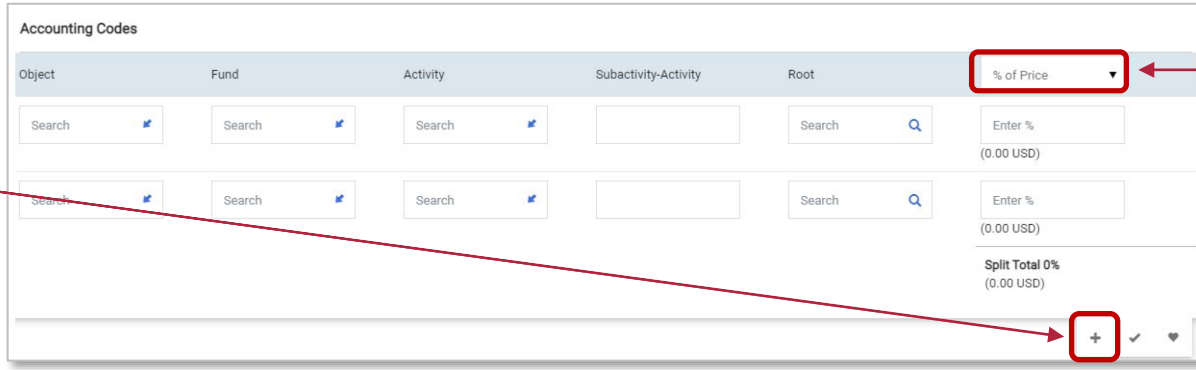




Checkout Process – add split options

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

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

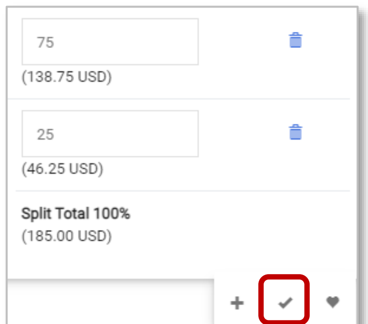


Once you have selected the number of splits you want to use, you have three options for specifying how to allocate the split.

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

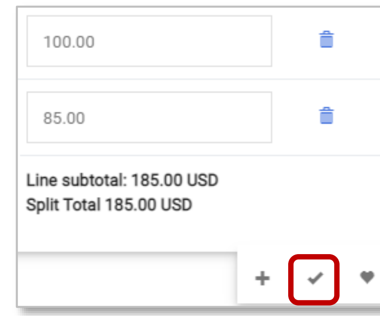
% of Qty

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: <u>you can enter up to four decimal points</u> 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.