Checkout Process

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. 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.

3. Navigate to **Attachment Overview** 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

4. Navigate to **Final Review** when you are done reviewing and editing the request. The buttons you see depend on your role:
   - **Shoppers** have the option to assign a cart to a Requestor
     - See the [Assigning a Cart](#) guide for more information.
   - **Requestors** can:
     - Validate Account Segments to confirm the CoA coding
     - Submit Request into the approval workflow, and
     - Assign Cart to another Requestor

Please note: 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.

5. A confirmation message will appear that your cart has been assigned (for Shoppers) or requisition has been submitted into workflow (for Requestors)

6. Click the **View Approval Status** link to preview the approval workflow.

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1. Navigate to **Requisitions** and review the checklist on the left side of the Checkout page.
   - All items must be green to submit it into workflow
   - Grayed out items mean there is missing/invalid information
     - Click the item to go to that page and make any necessary edits

2. Navigate to **Accounting Codes** to update the COA:
   - Click the **Edit** button.
   - Enter the codes for each segment of the string. You can perform a search on some segments by clicking the **Select from all values** link.
   - Click the **add split** link to add another code for split costing. Further details on splitting costs are outlined in a separate section in this guide.
   - **Accounting Information** can vary by line as well. You can see the line-level accounting information by navigating down the page to the line items.

3. **Next Steps**
   - **Create new draft cart**
   - **Search for another item**
   - **Check the status of an order**
   - **Return to your home page**

4. **Next Steps**
   - **View Approval Status**
   - **Search for another item**
   - **View order history**
   - **Check the status of an order**
   - **Return to your home page**
   - **Create new draft cart**

08.08.20
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** 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 **show monetary calculations** 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.

Note: there are implications of selecting **Amount of Price** to consider before using this option.

The amounts that you specify here will be converted by B2P into a percentage with **two decimal points**. Oracle uses four decimal points as a default so this can result in a difference in rounding between B2P and the Oracle general ledger.

If you are using Sponsored Activity, Subcontract Activity, or Asset Acquisitions we recommend you choose to split by **% of Price and enter a percentage with four decimal points specified** to ensure exact amounts and percentages are reflected in B2P and the Oracle general ledger.

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.