

Step-by-Step Guide

Creating Shopping Carts from Invoice Attached Forms



In This Guide

- ✓ Selecting an Invoice Attached form
- ✓ Creating a shopping cart

This guide demonstrates how to create an Invoice Attached form for goods or services. This form is used for payments for which the goods or services have already been purchased in compliance with Purchasing policy and procedures.

Understanding how forms work



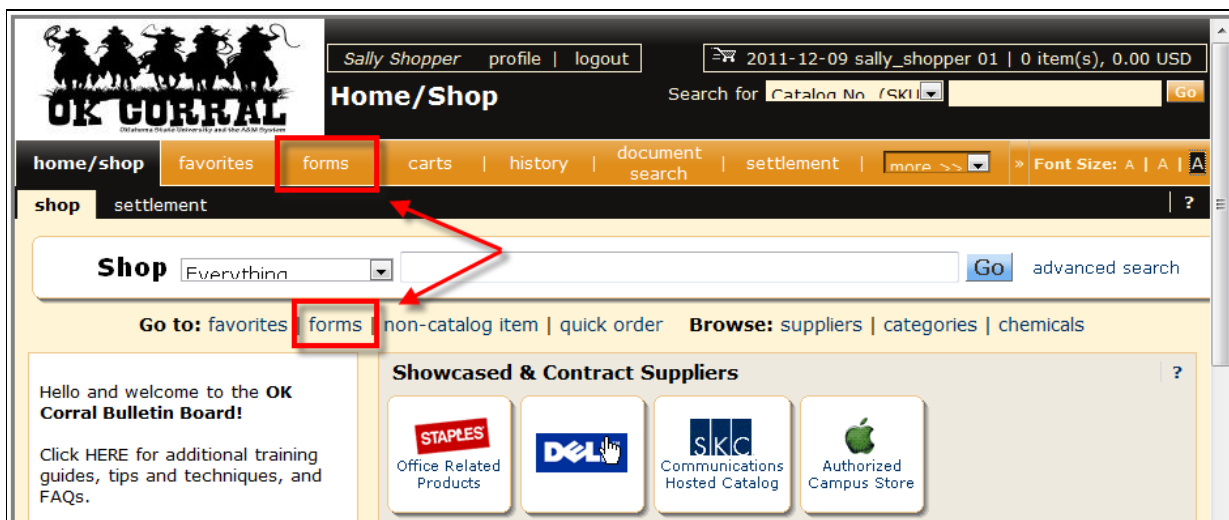
A form is presented as a “pop-up” page. Select the form, complete the required information and the item or service is returned to your shopping cart. The form will travel with your shopping cart, allowing convenient review by requesters and approvers.

There are several types of forms available in OK Corral.

Change Order Form	Invoice Attached Form	Print Request
Imprest Cash Reimbursement	New Vendor Request	Sole Source Justification Form
Interagency Payments	Other Payments	

Procedure

1. From the OK Corral home page, select the **forms**.



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2. From the **Shared** ⇒ **Common Forms** section, click **Invoice Attached Form**.

3. In the **Supplier Information** section enter the **Supplier** or click the **supplier search** link.

- ▲ Validate that the supplier and order **Fulfillment Address** selected are accurate. An order fulfillment address is the address to which the PO will be issued.

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4. Enter the optional information in the **Special Handling Instructions** section.

A. Enter the **Handling Notes**.

B. Enter the **Needed By** date.

5. Enter the required information in the **Order Information** section.

A. Enter the **Catalog No.**

B. Enter the **Quantity**.

C. Enter the **Unit Price**.

D. Enter the **Product Description**.

E. Select the appropriate Unit of Measure (**UOM**).

The screenshot displays a web form with four main sections, each with a red box around its title:

- Special Handling Instructions**: Contains a text area for "Handling Notes" (2000 characters remaining), a "Needed By" date field (mm/dd/yyyy), and "expand | clear" links.
- Order Information**: Contains fields for "Catalog No." (PK-V12345), "Quantity" (1), "Unit Price" (200.00), "Product Description" (Video adapter, 241 characters remaining), and "Packaging (UOM)" (EA - Each). It also has "expand | clear" links.
- Reason for Use of Institutional Funds**: Contains a text area for "Reason for Use" (Required for research center project, 1964 characters remaining) and "expand | clear" links.
- Additional Information**: Contains a red warning message "Attachment of invoice/payment documentation is required", a section for "Internal Attachments" with an "add attachment" link (indicated by a red arrow), and a yellow box with a red icon and the text "Value required".

6. Enter the required information in the **Reason for Use of Institutional Funds** section.

7. Attach the required invoice or payment documentation in the **Additional Details** section.

A. Select the **Attachment Type**.

B. Click **Browse** to search and select the attachment.

C. Click the **Save** button.

8. In the **Available Actions** section (located at the top of page), select **Add and go to Cart** and click the **Go** button.

The screenshot shows a box titled "Available Actions (Click [here](#) for details):". Inside, there is a dropdown menu with "Add and go to Cart" selected. To the right of the dropdown are two buttons: "Go" and "Close".

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OK Corral offers the following actions when working with forms:

- **Add and go to Cart:** Select to add the form to your current shopping cart. The active cart page will display.
- **Add to Cart and Return:** Select to add the form to your current shopping cart. The form page displays with the previously selected vendor and all other fields are reset to blank.
- **Add to Cart:** Select to add the form to your current shopping cart. The form page displays unchanged. This option eliminates redundant data entry by using the existing form data as a template.
- **Add to Draft Cart or Pending PR/PO:** Select to add the form to a draft cart or pending requisition. The system presents a popup page with a valid list of carts and requisitions. Select the cart or requisition. When complete, the form page displays unchanged.
- **Add to Favorites:** Select to add the form as a favorite. A pop-up window displays where you can select the personal folder and name of the form. When complete, the previous page displays.

9. Enter a unique shopping cart **Name** (optional) and click the **Update** button.

▶ Shop Smart!
Name your Cart!

Shopping Cart for Patrick Biggs

Name this cart:

Have you made changes? Perform an action on (0 items selected)...

Product Description	Unit Price	Quantity	Total
Annual license for research journals form...	4,500.00 USD	1	4,500.00 USD

Cart Name: A default cart name, comprised of the following data is automatically assigned:
Create Date + User Name + Sequential Number.

For example: 2011-04-01 sallyshopper 03

▲ You can accept the default name but it is **recommended** to enter a unique name which can be used later to easily identify or search for your shopping cart.

You have successfully added an Invoice Attached form to your shopping cart.

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Your Next Step

Shoppers:

See the ***Assigning Shopping Carts*** Step-by-Step Guide, where you'll learn how to:

- ✓ Assign shopping carts
- ✓ Search for requesters
- ✓ Assign default requesters

Requesters:

See the ***Proceeding to Checkout*** Step-by-Step Guide, where you'll learn how to:

- ✓ Add campus and shipping information
- ✓ Add accounting and commodity code
- ✓ Submit shopping carts as requisitions