Proceeding to Checkout



In This Guide

- ✓ Reviewing error messages
- ✓ Adding Account Codes
- ✓ Finalizing orders

- ✓ Adding contract, campus and matching information
- ✓ Adding Shipping and Billing information
- ✓ Submitting requisitions

This guide demonstrates how to complete the shopping process by submitting a shopping cart to workflow approval.



Users can submit a shopping cart to complete a requisition.

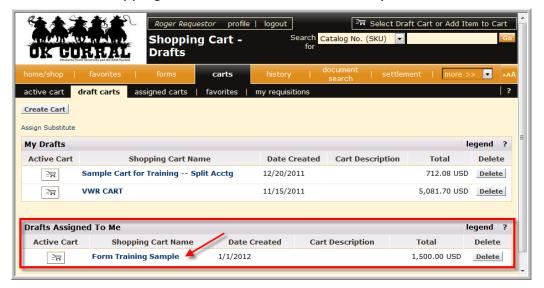


OK Corral validates the shopping cart for proper completion of cart details and, if necessary, prompts the user to edit/enter appropriate details.

Procedure

<u>Alternate Navigation:</u> You can also navigate to your assigned carts from the homepage. Go to go to **Action Items** ⇒ **Approvals/Assigned Carts** ⇒ **Carts Assigned to me**.

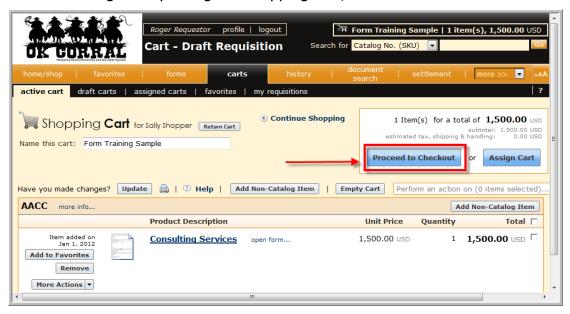
2. Click on the shopping cart name in order to make it your active cart.



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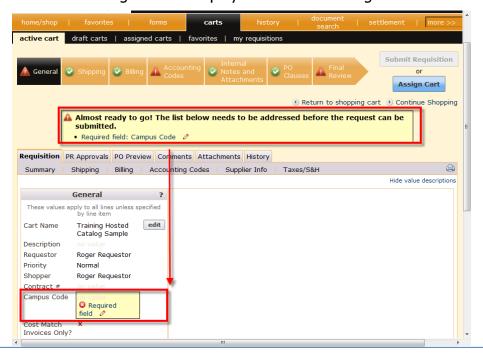
3. After reviewing and updating the shopping cart, click on the **Proceed to Checkout** button.



4. If the shopping cart has errors or missing data, the page is displayed with error messages.

An error icon is displayed within the navigation chevrons which are located at the top of the page. You can click on the chevron link to navigate to the section and view details or make changes. General

An error message is also displayed under the navigation chevrons.

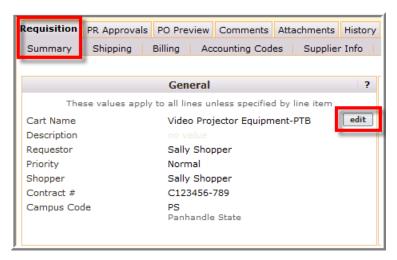


Proceeding to Checkout

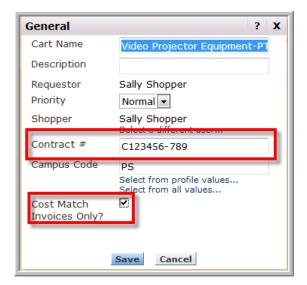


Entering Contract, Campus and Matching Information

- 5. To enter the Contract, Campus or Matching information, click Requisition ⇒ Summary.
- 6. Click the edit button.



7. Optional: Enter the **Contract Number**. For example: E&I, OSU or OU contract number.



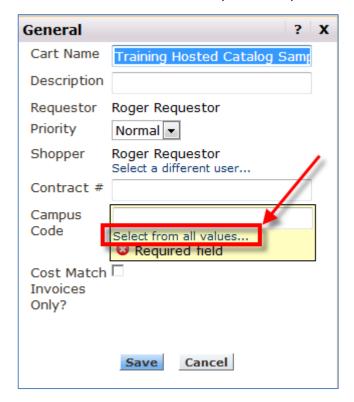
Proceeding to Checkout

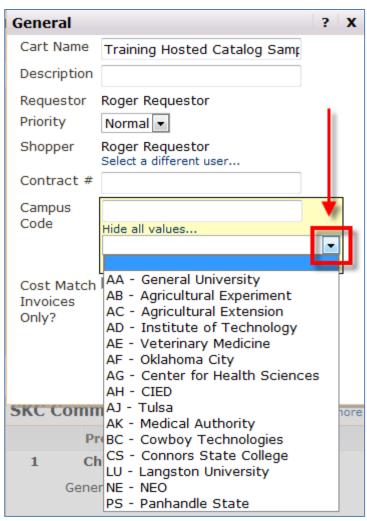


8. Enter or select the appropriate **Campus Code**.

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To review the complete campus code list click the **Select from all values...** link.





- 9. Optional: Click the **Cost Match** ✓ checkbox if invoices will be matched by cost rather than quantity.
- 10. Click the **Save** button.
- 11. The **General** tab is now complete.



Proceeding to Checkout



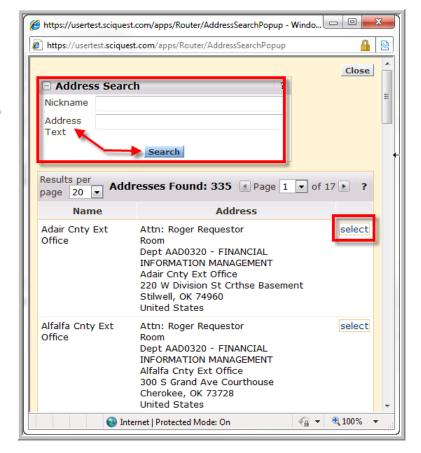
Entering Shipping Information

12. To enter the **Shipping** information, select the **Shipping** tab and click on the **Required field**

link or the edit button to select the Shipping address.

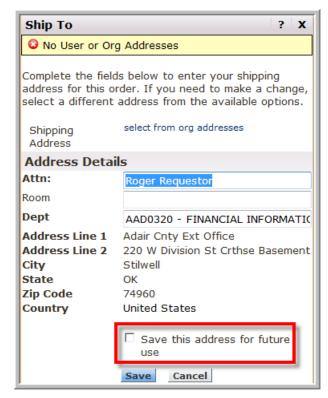


13. Click on the **select from org addresses** link to search for the
Shipping Address by using the **Address Search** criteria. You
can enter all or part of the Ship to
Locations or Address Text.



Proceeding to Checkout



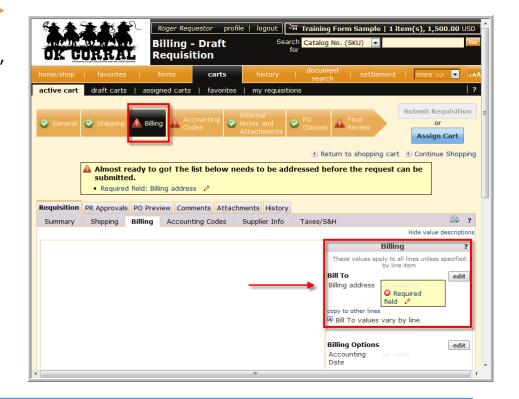


⇔ Back on the **Ship To** window, you can check the ✓ **Save this address for future use** check box if you plan to use this address in the future (Optional).

14. Click the Save button.

Entering Billing Information

15. To enter the Billing information, select the **Billing** tab and click on the **Required field** link or the edit button to select the Billing address.



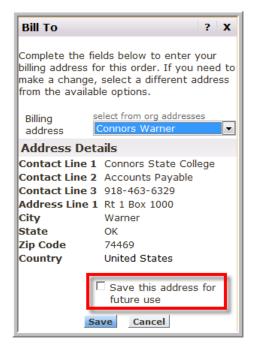
Proceeding to Checkout



15. Select a Billing Address from the drop down list.

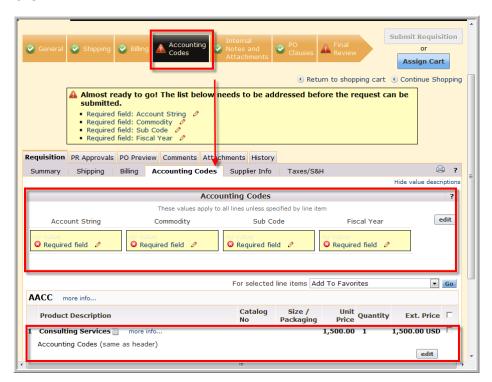
Optional: you can check the ☑ Save this address for future use check box if you plan to use this address in the future.

16. Click the **Save** button.



Entering Accounting Codes

17. To enter the **Accounting Codes** information for the requisition, select the **Accounting Codes** tab and click on the **Required field** link or the the:



- Account String
- Commodity Code
- Sub Code
- Fiscal Year

□ Line edit

Alternatively, you can enter accounting codes for a specific line by clicking the **edit** button on the requisition line.

Proceeding to Checkout

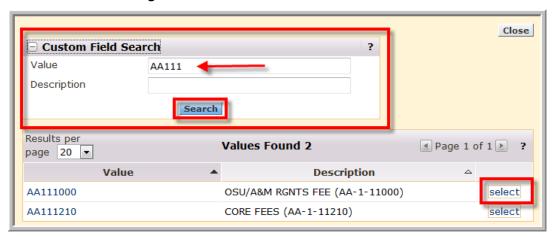


18. If you know the accounting value, enter it directly in the appropriate field.

Optional: The recalculate/validate values link will validate your entry.



19. If needed, click on the **Select from all values...** link to search for the **appropriate account code** using the **Custom Field Search** criteria.



20. Click the **Save** button when you have entered all the accountings codes.

Proceeding to Checkout



Finalizing Your Order

- 21. Click the **Final Review** tab to complete your review.
- 22. If needed **click** the **edit** button to make updates as needed.
- 23. Click the **Submit Requisition** button to submit the requisition to workflow approval.



24. A congratulatory message appears, along with a summary of your requisition.

The OK Corral sends an email notification to the approver and shopper.

You have successfully submitted your requisition.

Your Next Step

See the **Previewing Requisition Workflow and Purchase Orders**

Step-by-Step Guide, where you'll learn how to:

- Review requisition approvals
- Review purchase order information

