

Step-by-Step Guide

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

1. Access your shopping carts by clicking **[carts](#)** ⇒ **[draft carts](#)**. Locate the shopping cart you want to process.

Alternate Navigation: 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.

The screenshot shows the OK Corral Shopping Cart - Drafts interface. At the top, there's a header with the OK Corral logo and user information (Roger Requestor, profile, logout). Below the header is a navigation bar with links: home/shop, favorites, forms, carts, history, document search, settlement, and more >>. The 'carts' link is highlighted. Below the navigation bar is a sub-navigation bar with links: active cart, draft carts, assigned carts, favorites, and my requisitions. The 'draft carts' link is highlighted. Below the sub-navigation bar is a 'Create Cart' button and an 'Assign Substitute' link. The main content area is divided into two sections: 'My Drafts' and 'Drafts Assigned To Me'. The 'My Drafts' section contains a table with columns: Active Cart, Shopping Cart Name, Date Created, Cart Description, Total, and Delete. It lists two carts: 'Sample Cart for Training -- Split Acctg' (12/20/2011, 712.08 USD) and 'VWR CART' (11/15/2011, 5,081.70 USD). The 'Drafts Assigned To Me' section is highlighted with a red box and contains a table with columns: Active Cart, Shopping Cart Name, Date Created, Cart Description, Total, and Delete. It lists one cart: 'Form Training Sample' (1/1/2012, 1,500.00 USD). A red arrow points to the 'Form Training Sample' cart name.

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
<input type="checkbox"/>	Sample Cart for Training -- Split Acctg	12/20/2011		712.08 USD	Delete
<input type="checkbox"/>	VWR CART	11/15/2011		5,081.70 USD	Delete

Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete
<input type="checkbox"/>	Form Training Sample	1/1/2012		1,500.00 USD	Delete

Step-by-Step Guide

Proceeding to Checkout



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

OK CORRAL

Roger Requestor profile | logout

Form Training Sample | 1 item(s), 1,500.00 USD

Cart - Draft Requisition

Search for Catalog No. (SKU) Go

home/shop | favorites | forms | carts | history | document search | settlement | more >> | AAA

active cart | draft carts | assigned carts | favorites | my requisitions

Shopping Cart for Sally Shopper Return Cart

Continue Shopping

Name this cart: Form Training Sample

1 Item(s) for a total of 1,500.00 USD
subtotal: 1,500.00 USD
estimated tax, shipping & handling: 0.00 USD

Proceed to Checkout or Assign Cart

Have you made changes? Update | Help | Add Non-Catalog Item | Empty Cart | Perform an action on (0 items selected)...

AACC more info... Add Non-Catalog Item

Product Description	Unit Price	Quantity	Total
Item added on Jan 1, 2012 Consulting Services open form...	1,500.00 USD	1	1,500.00 USD

Add to Favorites Remove More Actions

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.



An error message is also displayed under the navigation chevrons.

home/shop | favorites | forms | carts | history | document search | settlement | more >>

active cart | draft carts | assigned carts | favorites | my requisitions

General Shipping Billing Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition or Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.
Required field: Campus Code

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide value descriptions

General ?

These values apply to all lines unless specified by line item

Cart Name Training Hosted Catalog Sample edit

Description no value

Requestor Roger Requestor

Priority Normal

Shopper Roger Requestor

Contract # no value

Campus Code Required field

Cost Match x

Invoices Only?

Step-by-Step Guide

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.

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info

General ?

These values apply to all lines unless specified by line item

Cart Name	Video Projector Equipment-PTB
Description	no value
Requestor	Sally Shopper
Priority	Normal
Shopper	Sally Shopper
Contract #	C123456-789
Campus Code	PS
	Panhandle State

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

General ? X

Cart Name	Video Projector Equipment-PTB
Description	
Requestor	Sally Shopper
Priority	Normal ▼
Shopper	Sally Shopper
	Select a different shopper
Contract #	C123456-789
Campus Code	PS
	Select from profile values...
	Select from all values...
Cost Match	<input checked="" type="checkbox"/>
Invoices Only?	<input type="checkbox"/>

Save Cancel

Step-by-Step Guide

Proceeding to Checkout



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

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

General ? X

Cart Name: Training Hosted Catalog Sam

Description:

Requestor: Roger Requestor

Priority: Normal

Shopper: Roger Requestor
Select a different user...

Contract #:

Campus Code: **Select from all values...** (Required field)

Cost Match ☐

Invoices Only?

Save Cancel

General ? X

Cart Name: Training Hosted Catalog Sam

Description:

Requestor: Roger Requestor

Priority: Normal

Shopper: Roger Requestor
Select a different user...

Contract #:

Campus Code: Hide all values...

Cost Match ☐

Invoices Only?

AA - General University
AB - Agricultural Experiment
AC - Agricultural Extension
AD - Institute of Technology
AE - Veterinary Medicine
AF - Oklahoma City
AG - Center for Health Sciences
AH - CIED
AJ - Tulsa
AK - Medical Authority
BC - Cowboy Technologies
CS - Connors State College
LU - Langston University
NE - NEO
PS - Panhandle State

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.

Submit Requisition or Assign Cart

Return to shopping cart Continue Shopping

You have completed the required information in this step. At this point, you can do the following:

Proceed to the next step: Shipping. Go straight to the end: Final Review.

Step-by-Step Guide

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.

Step-by-Step Guide

Proceeding to Checkout



Ship To ? X

No User or Org Addresses

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping Address [select from org addresses](#)

Address Details

Attn:

Room:

Dept:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Country:

☐ Save this address for future use

⇐ 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 button to select the Billing address.

OK Corral logo

Roger Requestor profile | logout Training Form Sample | 1 item(s), 1,500.00 USD

Billing - Draft Requisition

Search for Catalog No. (SKU)

home/shop | favorites | forms | carts | history | document search | settlement | more >>

active cart | draft carts | assigned carts | favorites | my requisitions

General Shipping **Billing** Accounting Codes Internal Notes and Attachments PO Clauses Final Review

Submit Requisition or Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Billing address

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping **Billing** Accounting Codes Supplier Info Taxes/S&H

Hide value descriptions

Billing ?

These values apply to all lines unless specified by line item

Bill To

Billing address

copy to other lines

Bill To values vary by line

Billing Options

Accounting no value

Date

Step-by-Step Guide

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 **edit** button to enter or complete 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.

Step-by-Step Guide

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.

Accounting Codes

Account String: AA111000
Commodity: Select from all values...
Sub Code: Required field
Fiscal Year: Select from all values...
recalculate / validate values
Save Cancel

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

Custom Field Search

Value: AA111
Description:
Search

Results per page: 20 Values Found 2 Page 1 of 1

Value	Description	
AA111000	OSU/A&M RGNTS FEE (AA-1-11000)	select
AA111210	CORE FEES (AA-1-11210)	select

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

Step-by-Step Guide

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