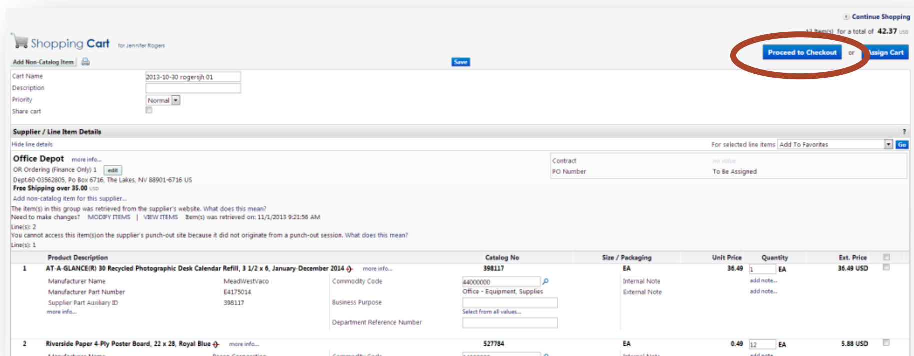
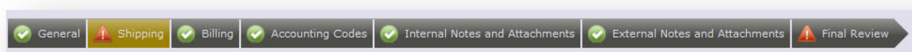
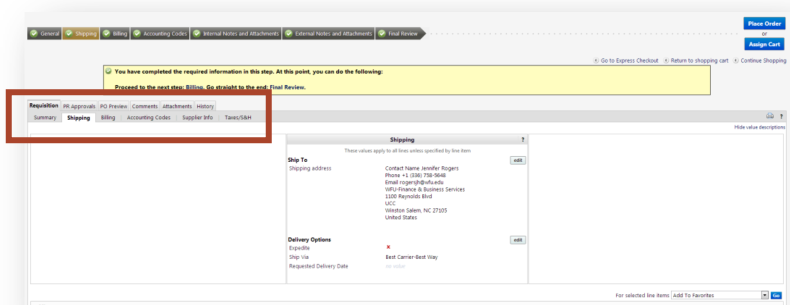
DEACON DEPOT

# Toolbox: Advanced Checkout Cart Review/Order Creation

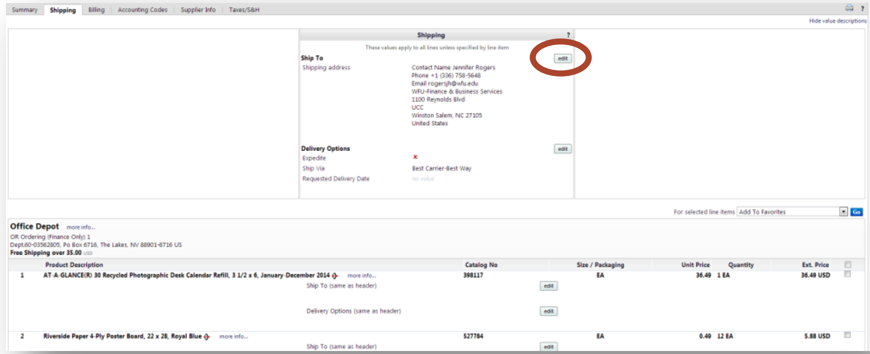
Reviewing the cart and completing and necessary information prior to placing the order results in the creation of the Purchase Requisition. This quick guide walks you through using the Advanced Checkout to edit information about your order at both the header and line levels.

**To begin the requisition submission process:**

<table>
<tr><td>From the Shopping Cart screen, click “Proceed to Checkout”.</td><td>
</td></tr>
<tr><td>The Draft Requisition screen displays. Completing the information on this screen will generate the Purchase Requisition.<br><br>The cart review arrow seen here displays at the top of the screen. This indicates completed sections of the requisition with a green circle and sections that need additional information with a red triangle.<br><br>You can also click the corresponding tab to complete any necessary information.</td><td>
<br>NOTE: If any required information is incomplete, the system will display that section of the draft requisition on the screen for you to complete.<br>
</td></tr>
</table>

To edit the information, click the edit button within the appropriate section.

In this example, we are editing the shipping address at the header level. This affects all line items on the requisition.

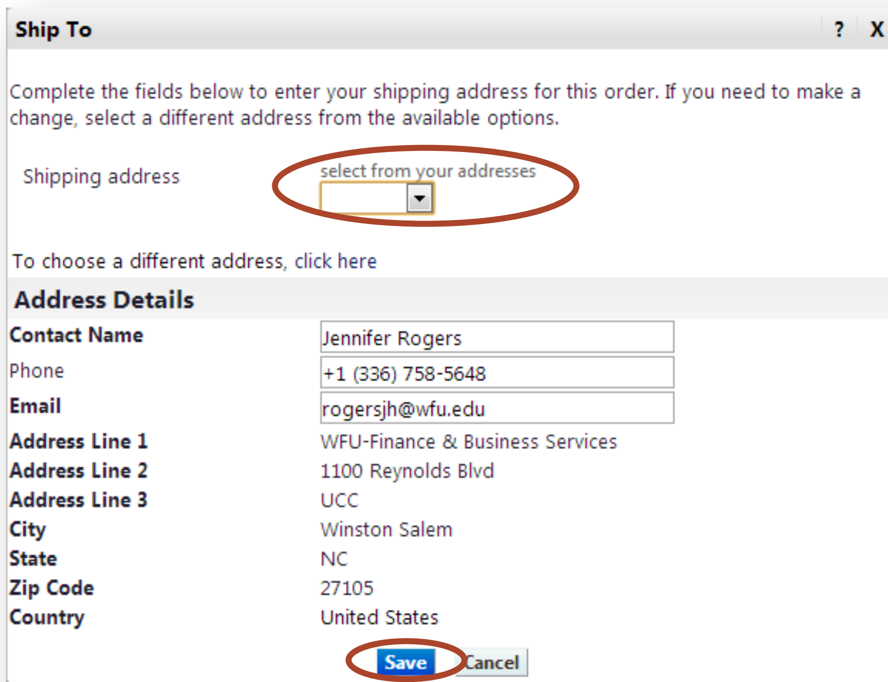


Select the desired ship-to address either by using the drop-down arrow to select an address stored in your profile, or use the "click here" link to choose a different address.

Once all the address information is complete, click the "Save" button.

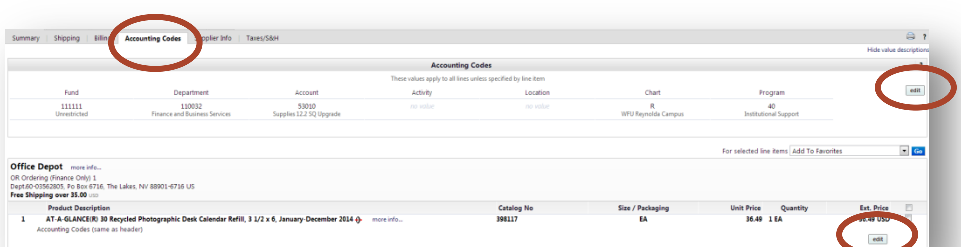
If necessary, enter room numbers behind the Contact Name.

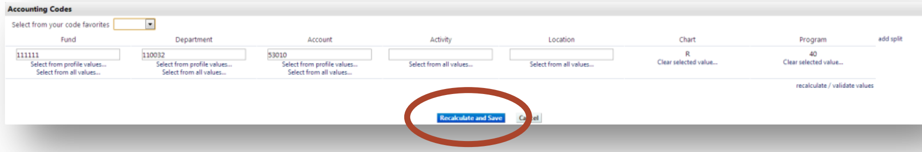
NOTE: To enter shipping information for individual line items, the same process is followed, but for the desired line item.




**To enter accounting information:**

Select the Accounting Codes sub-tab and click the "edit" button for the header or for the line item.



| | |
|---|---|
| Complete the required accounting code information, either for the header or the line. You may type in the value if known, or search for the correct value, either from your profile or all values.<br><br>Once all information is entered, click “Recalculate and Save”. |  |

- The chart and program codes are required but will auto-populate.
- A purchase may be split between Funds or Departments, and the split can either be for the entire requisition or for line items in the cart.

**To split a requisition:**

| | |
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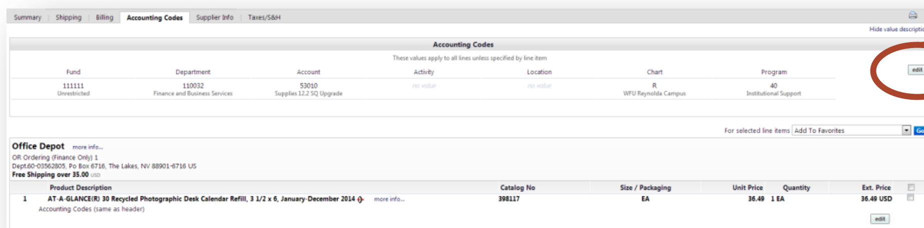
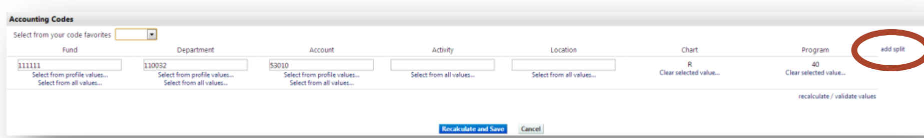
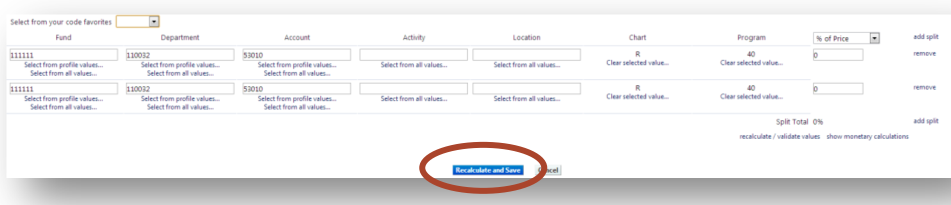
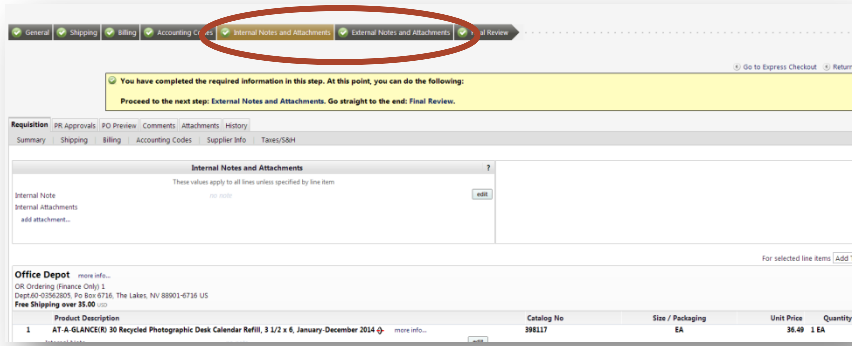
| Select the Accounting Codes sub-tab and click the “edit” button in the Accounting Codes section at the top of the screen for the header. If you are splitting a single line item, click the edit button beside the line item. |  |
| In the pop-up screen that displays, click the “add split” link on the far right. |  |
| An additional accounting code line is added. Continue clicking the “add split” link until the desired number of lines is reached.<br><br>Choose the type of split by clicking on the drop-down arrow to the left of the “add split” link. Depending on the type of split chosen, the total of all the splits must equal either 100% or match the total price of the requisition. If the cents are off on a percent of price split, they will round. |  |

**To add notes and attachments:**

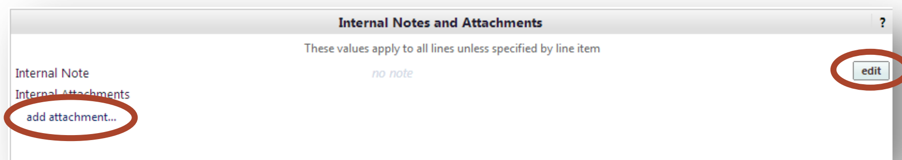
The examples that follow illustrate adding internal notes and attachments. The process is the same for external notes or attachments. Internal notes and attachments remain here at WFU, and external notes and attachments are sent to the supplier when your Purchase Order (PO) is created.

Click either the “Internal Notes and Attachments” or “External Notes and Attachments” link in the review arrow at the top of the screen.



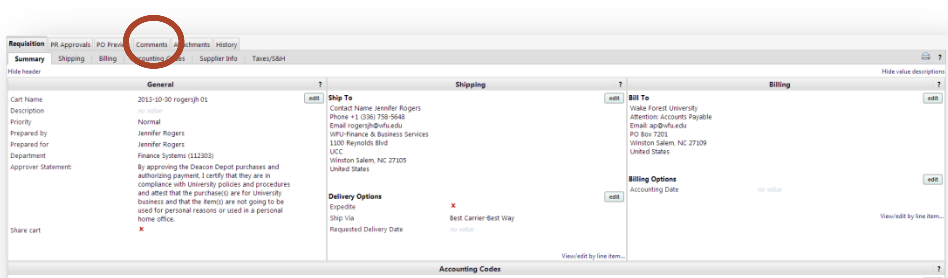

To add notes, click “edit” and a separate pop-up box will appear with a field to enter the information. Once the note has been entered, click “save”.

To add attachments, click “add attachment” and a pop-up screen will display. Select the attachment type by clicking on the drop-down arrow. Under attachment details, click the “Choose File” button to select the desired file. Click “save”.




**To add a comment:**

Select the comments tab.



<table>
<tr>
<td>From the comments tab, click “Add Comment”.</td>
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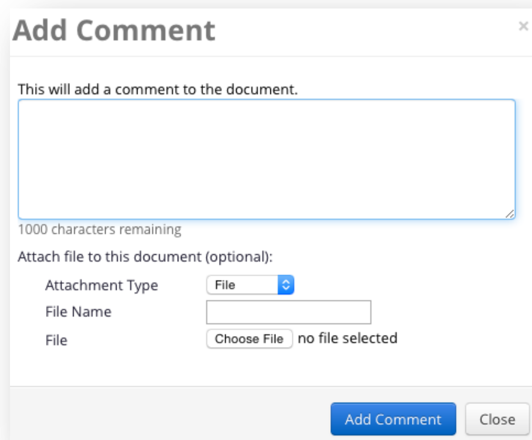
<tr>
<td>A pop-up box will display. Enter the necessary information and click “Add Comment”.<br><br>Once all required information has been entered, perform a final review by clicking on the Summary sub-tab. The cart may then be submitted by clicking on the “Place Order” button.</td>
<td>
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