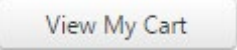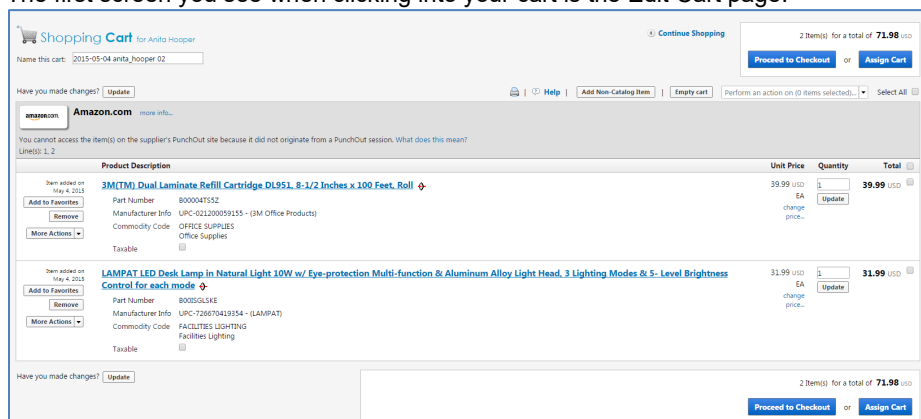# Submitting an Order
Quick Reference Guide

CART OVERVIEW

Items that you wish to order are initially put into a Cart where you define your products, quantities, ship to address, and accounting fields. Once your Cart is submitted into workflow, it becomes a Purchase Requisition (PR).

1. When you have finished shopping, click the 🛒 icon at the top right of the page followed by **View My Cart** to access your active cart.
2. Each cart icon will look different, updated with the dollar total in the cart.

EDIT CART

The first screen you see when clicking into your cart is the Edit Cart page:

Here you can update the Cart Name and description for your cart. To update the quantity of an item, change the value in the **Quantity** field, and click **Update**.

When you have finished making all necessary changes, click **Proceed to Checkout**.

REVIEW CART

The Review Cart page is where you will verify the ship to address (as found in the setup), accounting codes, and make any other changes prior to submitting your cart for approvals.

SHIP TO ADDRESS

The Ship to address is a required field on all carts. To update the Ship to address:

1. Click the **edit** button underneath the **Shipping Address** field.
2. From the drop-down menu, select the **appropriate ship-to address** based on your location, and then complete the **Attn:** information.
3. If an alternate address is needed, choose another address by clicking **To choose a different address, click here** and select another address.
4. Verify the information that appears is correct, and if not, make any necessary changes, and then click **Save**.

ACCOUNTING CODES

You can assign accounting codes to the entire cart or individually to each line item. The Index and Account fields are required.

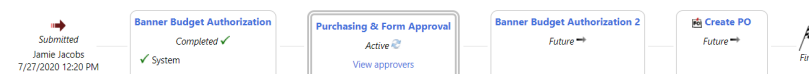1. In the **Accounting Codes** section, click the **Edit** button to assign account codes.

2. Enter the **Index and Account** values for this purchase.
3. To split this purchase, click the **add split** link, and then follow the same procedure as above to enter the appropriate accounting values.
4. Click **Save** when all values have been entered.
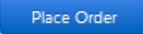
REQUISITION APPROVALS

Based on the contents of your cart, each line item cost, the total PR cost, and the accounting code values, your cart will be subjected to one or more approvals before becoming a Purchase Order. To see what approvals your cart is subject to prior to submitting your cart:

1. Click the **PR Approvals** tab.
2. You'll see a diagram with future workflow steps similar to this one:

SUBMIT CART

Once all information has been entered, the final step is to submit the cart or assign the cart to a cart assignee. If assigned, the assignee will review the cart and submit it for approval.

1. Once all required fields have been completed click **Place Order** if you wish to submit the cart.
2. To assign the cart to an assignee, click **Assign Cart**.
3. Click **Search for an assignee** to locate the cart assignee.
4. Enter the appropriate search criteria and then click **Search**.
5. Click the **[select]** link next to the appropriate assignee.
6. Click the ☐ to add this assignee to your profile so you can easily choose them in the future.
7. If desired, add an optional note to the assignee, and then click **Assign**.

The cart will be sent to the assignee, who will review and submit the cart into workflow for approval.