

Order/Requisition Instructions

Once you have placed items in your shopping cart from Punch-outs, hosted catalogs or non-catalog items, continue to complete your order as necessary.

1. Give the cart a name by entering it in the **Cart Name** text box and click **Save**. Then click the **Proceed to Checkout**
Note: Renaming your cart is not required, but naming the cart according to what you are purchasing might be helpful.

UNC Greensboro marketplace

Spartie Requestor | Action Items | Notifications 1 | 600.00 USD

Shop / My Carts and Orders / Open My Active Shopping Cart / Cart - 956395 - Draft Requisition

Continue Shopping

4 Item(s) for a total of **600.00** USD

Shopping Cart

Add Non-Catalog Item

Save

Proceed to Checkout or Assign Cart

Cart Name: Windows

Description:

Priority: Normal

You can also give your cart a Description

For selected line items: Add To Favorites Go

2. At this point you can:

- Add one or more line item in the cart to your Favorites. Select **Add to Favorites** from 'For selected line items' dropdown and click **Go** (See **Favorites** Instructions).

Cart Name: Windows

Description:

Priority: Normal

Supplier / Line Item Details

Show line details

For selected line items: Add To Favorites Go

A Better View Glass And Mirror Inc * more info...

Purchasing Vendor 2 edit

1511 Holbrook St, Greensboro, NC 27403-2708 US

Contract: no value

PO Number: To Be Assigned

Account Code:

Pricing Code:

Quote/Bid number:

Add To Favorites

Remove Selected Items

Remove All Items

Move to Another Cart

Change Supplier

Add to Draft Cart or Pending PR/PO

Change Commodity Code

- Remove an item from the cart by 1. Clicking the **Select** checkbox next to the item you want to remove 2. Select **Remove Selected Items** from the 'For selected line items' dropdown and 3. Clicking **Go**.

Cart Name: Windows

Description:

Priority: Normal

Supplier / Line Item Details

Show line details

For selected line items: Remove Selected Items Go

A Better View Glass And Mirror Inc * more info...

Purchasing Vendor 2 edit

1511 Holbrook St, Greensboro, NC 27403-2708 US

Add non-catalog item for this supplier...

Product Description

1 Windows more info...

2. Select **Remove Selected Items** from the 'For selected line items' dropdown

3. Click

1. Select the item you want to remove from the cart

- Remove all items from the order by selecting **Remove All Items** from the dropdown.
- Move the order to another cart by 1. clicking the **Select** checkbox next to the item(s) you want to move 2. select **Move to Another Cart** from the 'For selected line items' dropdown and 3 clicking **Go**.

Cart Name: 2013-04-16 GENTRN1 01
 Description:
 Priority: Normal

Supplier / Line Item Details

Show line details For selected line items: **Move to Another Cart**

A Better View Glass And Mirror Inc * more info...
 Purchasing Vendor 2
 1511 Holbrook St, Greensboro, NC 27403-2708 US

Contract: no value
 PO Number: To Be Assigned
 Account Code:
 Pricing Code:
 Quote/Bid number:

Add non-catalog item for this supplier...

Product Description	Catalog No	EA	EA	EA	EA	EA	EA
1 Windows <input type="button" value="more info..."/>	ww4	EA	150.00	<input type="checkbox"/>	4	EA	<input type="checkbox"/>
2 Window trim <input type="button" value="more info..."/>	WT4	EA	50.00	<input checked="" type="checkbox"/>	4	EA 200.00 USD	<input checked="" type="checkbox"/>

- The item(s) are now part of another draft cart and no longer part of the active cart.

Shop / My Carts and Orders / View Draft Shopping Carts / Shopping Cart - Drafts

Assign Substitute

My Drafts legend ?

Active Cart	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Delete
<input checked="" type="checkbox"/>	956395	2013-04-16 GENTRN1 01	4/16/2013		600.00 USD	<input type="button" value="Delete"/>
<input type="checkbox"/>	956460	2013-04-16 GENTRN1 02	4/16/2013		200.00 USD	<input type="button" value="Delete"/>

- Add to Draft Cart or Pending PR/PO by 1. clicking the **Select** checkbox next to the item(s) you want to add to another cart 2. select **Add to Draft Cart or Pending PR/PO** from the 'For selected line items' dropdown and 3. clicking **Go**.

Add non-catalog item

Cart Name: Windows
 Description:
 Priority: Normal

Supplier / Line Item Details

Show line details For selected line items: **Add to Draft Cart or Pending PR/PO**

A Better View Glass And Mirror Inc * more info...
 Purchasing Vendor 2
 1511 Holbrook St, Greensboro, NC 27403-2708 US

Contract: no value
 PO Number: To Be Assigned
 Account Code:
 Pricing Code:
 Quote/Bid number:

Add non-catalog item for this supplier...

Product Description	Catalog No	EA	EA	EA	EA	EA	EA
1 Windows <input type="button" value="more info..."/>	ww4	EA	150.00	<input type="checkbox"/>	4	EA	<input type="checkbox"/>
2 Window trim <input type="button" value="more info..."/>	WT4	EA	50.00	<input checked="" type="checkbox"/>	4	EA 200.00 USD	<input checked="" type="checkbox"/>

- Select the cart where you want to add the item(s) and click **Add to Draft Cart of Pending PR/PO**.

Add to Draft Cart or Pending Requisition/PO Close

Please select the appropriate cart (active/draft), pending requisition, or pending PO to which the selected line item(s) are to be added.

Active Cart		?
Select	Shopping Cart Name	
<input type="radio"/>	Windows (956395)	

Draft Cart		?
Select	Shopping Cart Name	
<input checked="" type="radio"/>	2013-04-16 GENTRN1 02 (956460)	

Add to Draft Cart or Pending Requisition/PO

- 3. Click **Proceed to Checkout** to review the order detail information and edit as necessary.

Shop / My Carts and Orders / Open My Active Shopping Cart / Cart - 956395 - Draft Requisition

Continue Shopping

8 Item(s) for a total of **800.00** USD

Shopping Cart for Spartie Requestor

Save **Proceed to Checkout** **Assign Cart**

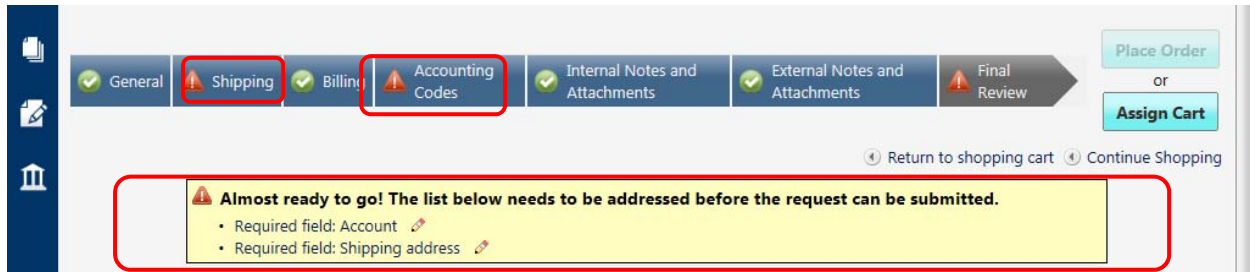
Cart was saved successfully

Add Non-Catalog Item

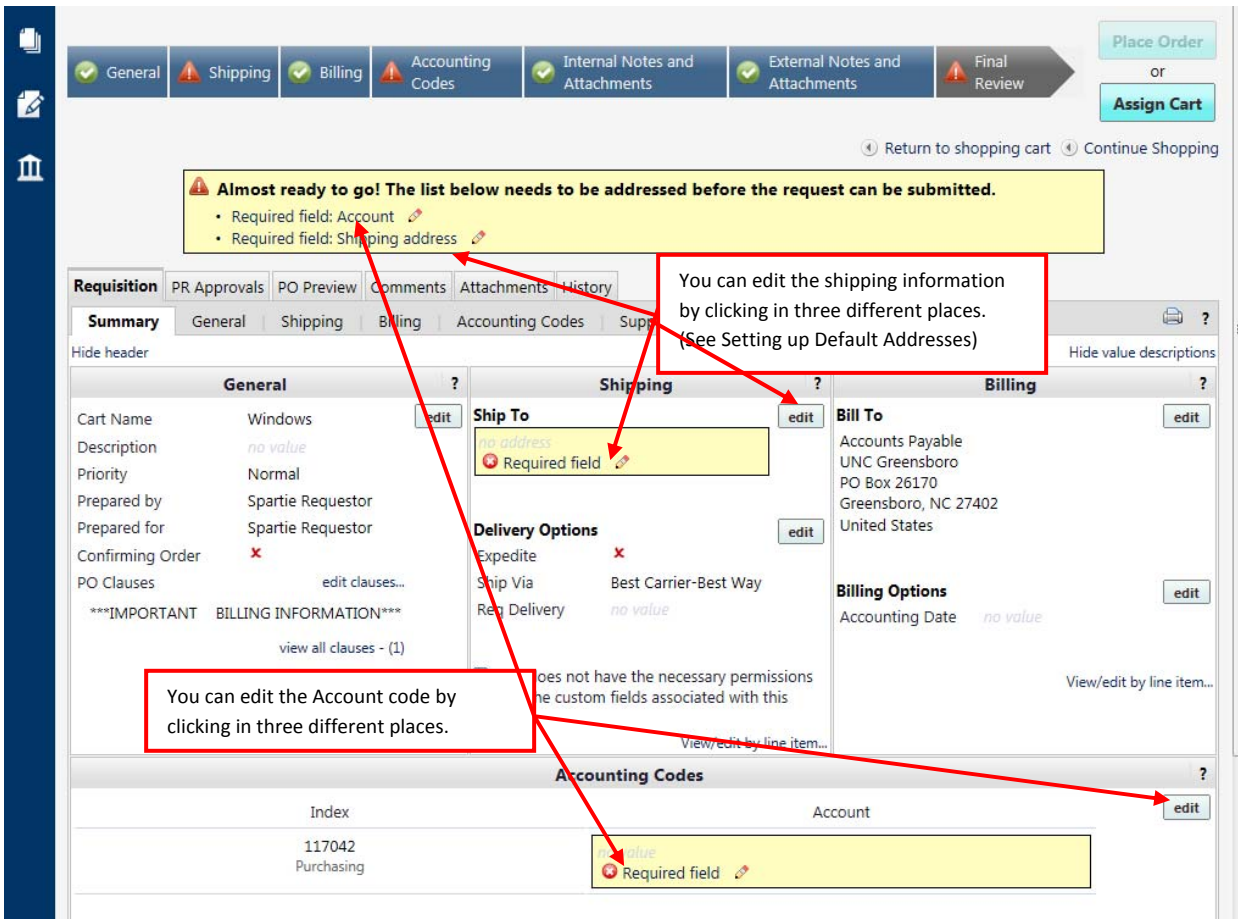
Cart Name: Windows
Description:
Priority: Normal

Supplier / Line Item Details

- Notice the required fields listed. This information must be provided before the order/requisition can be processed.

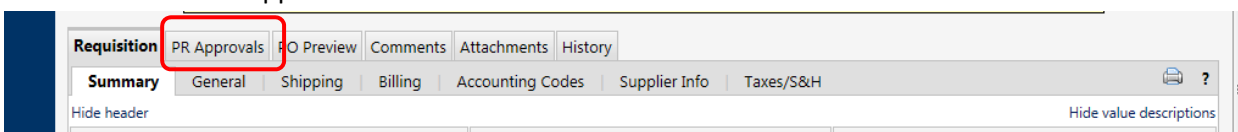


4. You can edit the information by clicking the edit button **edit** in each section.

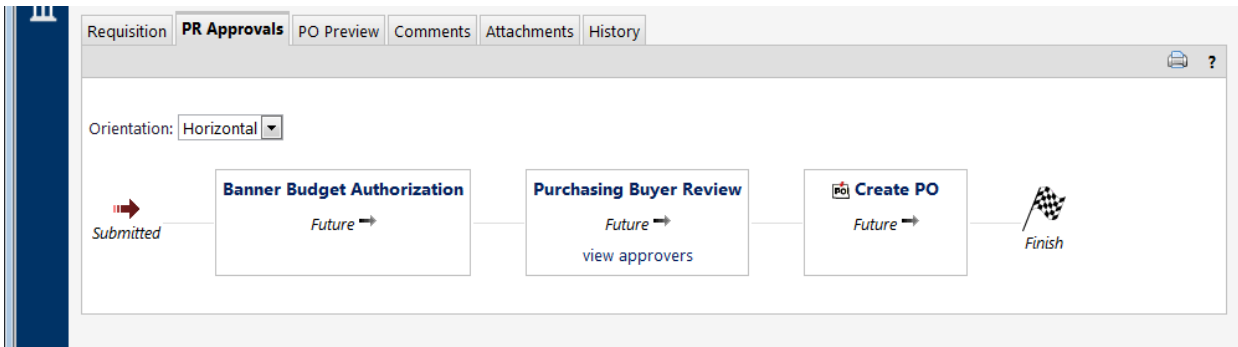


Note: Default indexes can be applied in your profile (see Adding/Defaulting Index Funds instructions). You should not set up a default Account code, unless you are a PCard only user, as each purchase is different and failure to change may result in a change order.

5. Click the PR Approvals tab to see the workflow of this order.



- Notice that the order/requisition will flow through Banner for verification of availability of funds and then through Purchasing for review before a PO is created.



- You can also click on the History tab to view information on the history of this order/requisition.

The screenshot shows the 'History' tab selected. At the top, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. Below the tabs is a search bar with the text 'Click to filter history' and a 'Click to filter history' button. To the right is an 'Export CSV' button. Below the search bar, it says 'Results per page 20' and 'Records found: 4'. The table below has the following columns: Line No, Date/Time, User, Step (s), Action, Field Name, From, To, and Note.

Line No	Date/Time	User	Step (s)	Action	Field Name	From	To	Note
	4/16/2013 1:02 PM	Spartie Requestor		Requisition modified	Billing address	empty	Accounts Payable, UNC Greensboro, PO Box 26170, Greensboro, NC 27402, United States	
Line 2	4/16/2013 1:02 PM	Spartie Requestor		New Line added	WT4	Non-catalog item		
Line 1	4/16/2013 1:01 PM	Spartie Requestor		New Line added	WW4	Non-catalog item		
	4/16/2013 1:01 PM	Spartie Requestor		Requisition modified	Cart Name	2013-04-16 GENTRN1 01	Windows	

6. Click **Place Order** to order the items in your shopping cart or **Assign Cart** to assign the cart to another person (See **Assigning Carts** instructions).

The screenshot shows the 'All Done!' message box with the following text:

The required information has been completed and this requisition is ready to be placed.

If this is a non-PCard order:

**Make sure you are using the correct index (fund) and account code and that there is ample budget in the line item!

**If you have an invoice:

----Mark the order as confirming (general section)

----Make sure to write the Banner PO number on the invoice (begins with a P) before sending to Accounts Payable!

**Make sure to receive your order in eMarketplace!

At the top right, there are two buttons: 'Place Order' and 'Assign Cart'. A red callout box points to the 'Place Order' button with the text: 'Click Place Order to place your order and start it through the PR Approvals workflow'. Another red callout box points to the 'Assign Cart' button with the text: 'Click Assign Cart to assign the cart to another person'. Below the message box, there are tabs for 'Requisition', 'PR Approvals', 'PO Preview', 'Comments', 'Attachments', and 'History'. At the bottom, there are tabs for 'Summary', 'General', 'Shipping', 'Billing', 'Accounting Codes', 'Supplier Info', and 'Taxes/S&H'.

- Once the order is placed, you receive **Requisition Information**.

Requisition Information

✓ **Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the Approvals Tab.**

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	956628 view
Requisition status	Pending
Cart name	Windows
Requisition date	4/16/2013
Requisition total	800.00 USD
Number of line items	2

- The requisition is listed in 'my requisitions' with a pending (circular blue double arrows) status until the requisition is turned into a PO.

The circular blue double arrows indicates the status of the order is pending

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
956628	A Better View Glass And Mirror Inc	Windows	Spartie Requestor	4/16/2013 2:00 PM	800.00 USD
956581	A Better View Glass And Mirror Inc	Windows	Spartie Requestor	4/16/2013 1:06 PM	0.00 USD
953229	Staples	Headset & corkboard	Spartie Requestor	4/9/2013 10:41 AM	303.99 USD
953226	Carolina Biological Supply Co.	Microscope slide sets	Spartie Requestor	4/9/2013 10:30 AM	129.90 USD
939333	A Better View Glass And Mirror Inc	2013-03-13 GENTRN1 02	Spartie Requestor	3/19/2013 9:13 AM	1.00 USD
927251	Apple Computer Inc	iPad & case	Spartie	2/21/2013 11:07 AM	540.00 USD