



Quick

Reference

Guide

## Adding Delivery and Accounting Information to Carts



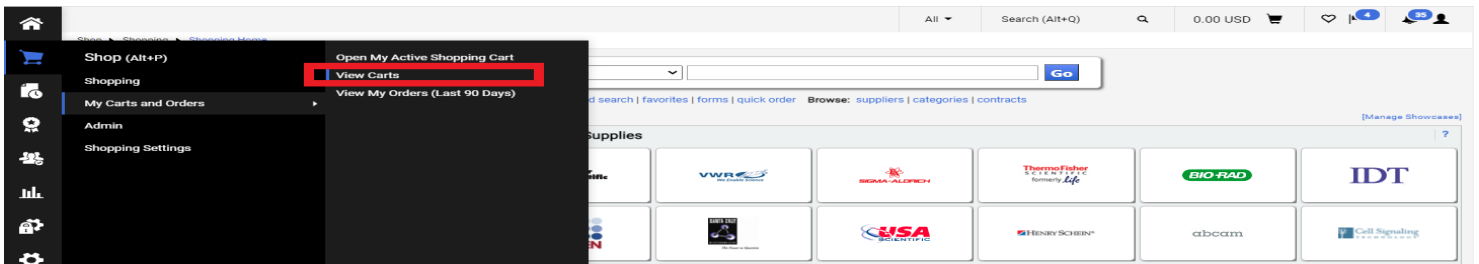
### In This Guide

- ✓ Reviewing error messages
- ✓ Adding accounting information

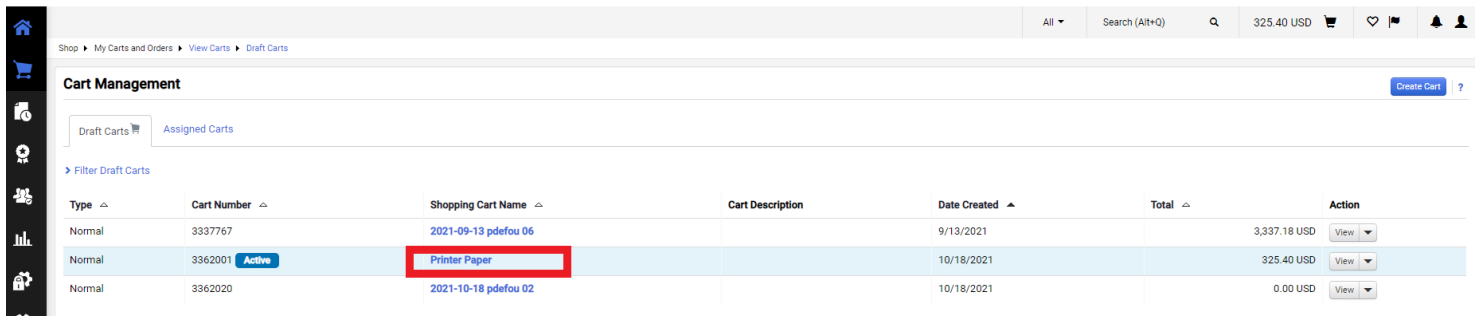
This guide demonstrates how to complete the shopping process by submitting a cart. Users can submit a cart to complete a requisition. Buy-U validates the cart for proper completion of cart details, and if necessary, prompts the user to correct/edit appropriate details.

### Procedure

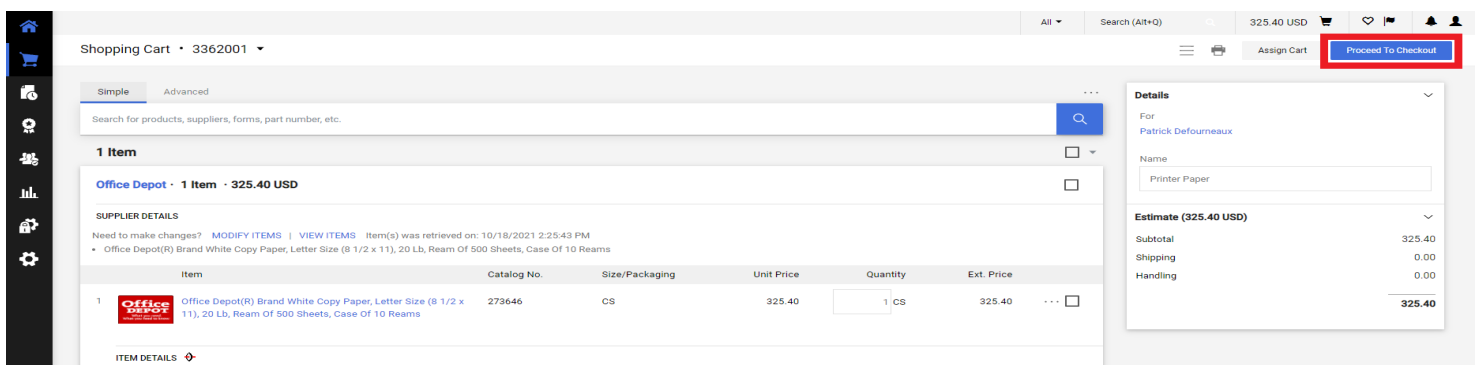
1. In the navigation bar on the left, hover over the **Shopping Cart** icon → **My Carts and Orders** and select **View Carts**.



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



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



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4. On the right, a list of issues are shown that need to be corrected in order to proceed. Click on the **Pencil** icon next to Shipping or click the **Required** icon to edit Shipping.

The screenshot shows the 'Requisition 3363249' interface. The 'Shipping' tab is active, showing 'Ship To' information with a 'Required' icon. A 'Draft' modal window is open on the right, listing issues that need to be corrected:

- Correct these issues. You are unable to proceed until addressed.
- Required: Shipping address
- Required: Account
- Required: Speedchart
- Required: Dept
- Required: Fund
- Required: Program
- Required: Class
- Required: GL Business Unit

Below the list, a warning states: 'Be aware of these issues. You may review and proceed. Empty: EMERGENCY\_COVID\_19\_FIELD and Hurricane IDA\_21'.

5. Select from one of the addresses listed or use the search box to find an address.

The first screenshot shows the 'Edit Shipping' modal window with a list of addresses. The address '1663100 - Patrick Defourneaux, 625, Purchasing, 433 Bolivar St, NEW ORLEANS, LA 70112, United States' is selected. A search box labeled 'Search additional' is highlighted.

The second screenshot shows the 'Edit Shipping' modal window with the selected address '1497500' expanded. The 'Contact Line 1' is 'Patrick Defourneaux' and the 'Room' is '650'. The 'Add to my addresses' checkbox is checked, and the 'Nickname' is 'Main Office'. The 'Make default' checkbox is also highlighted.

6. Selecting an address gives the option to update the Contact Line and Room Number. Click **Add to my addresses** to add to your address list. Here you can add a **Nickname**. Click the check box to make it your **Default Address**. Click **Save** to proceed.

# Adding Delivery and Accounting Information to Carts



7. Next, click the **Pencil** icon in the Accounting Codes section or click one of the **Required** icons.

The screenshot shows a requisition form for 'Printer Paper'. The Accounting Codes section is highlighted with a red box, and a pencil icon is also highlighted. The Accounting Codes table is as follows:

Account	Speedchart	Dept	Fund	Program	Class	Project	PC Bus Unit	Activity ID	GL Business Unit
no value	no value	no value	no value	no value	no value	no value	no value	no value	no value
Required	Required	Required	Required	Required	Required				Required

8. Click the search icon next to Speedchart.  
Search for the appropriate Speedchart and click the plus sign to add.

The screenshot shows the 'Edit Accounting Codes' dialog with a 'Lookup' window open. The 'Lookup' window displays a list of accounting codes with a plus sign next to the first entry, '0050100001 A/H-BS-CLIN EDUC-testing IB'.

Value	Description
0050100001	A/H-BS-CLIN EDUC-testing IB
0050100002	A/H-SPECIAL PRG
0050100003	INTERDISCIPLINARY HUMAN STUDIE
0050100004	A/H-DEAN
0050100005	405010320 A/H-DEAN'S SEARCH
0050100006	INTERDISCIPL HUMAN STUD-GRATIS
0050100300	A/H-Administration-ARRA Funds
0050105001	A/H-DEAN-ADMISSIONS
0050115001	A/H-DEAN-ALUMNI AFF
0050140001	A/H-DEAN-MINORITY AF

9. Click the search icon next to Account.  
Search for the appropriate Account code and click the plus sign to add.  
**Save** to continue.

**You have successfully added delivery information and accounting codes to a requisition.**



Requesters will be required to select an approver to complete the Accounting Codes section. However, the Approver will not be required to take action on orders less than \$5,000.00.