



SmartCART - Approve and Submit a Window Shopper Order

Purpose

This document outlines the steps for a requisitioner to approve and submit a SmartCART order assigned to them by a SmartCART window shopper.

Responsibility

- **University Office:** Procurement & Distribution Services
- **Official:** Chief Procurement Officer
- **Team:** ERP/SmartCART
- **Role that Completes the Process:** SmartCART Requester
- **Process Auditor/Frequency:** Director of Operations/Biannual
- **Established:** March 2024

Associated Systems/Computer Programs

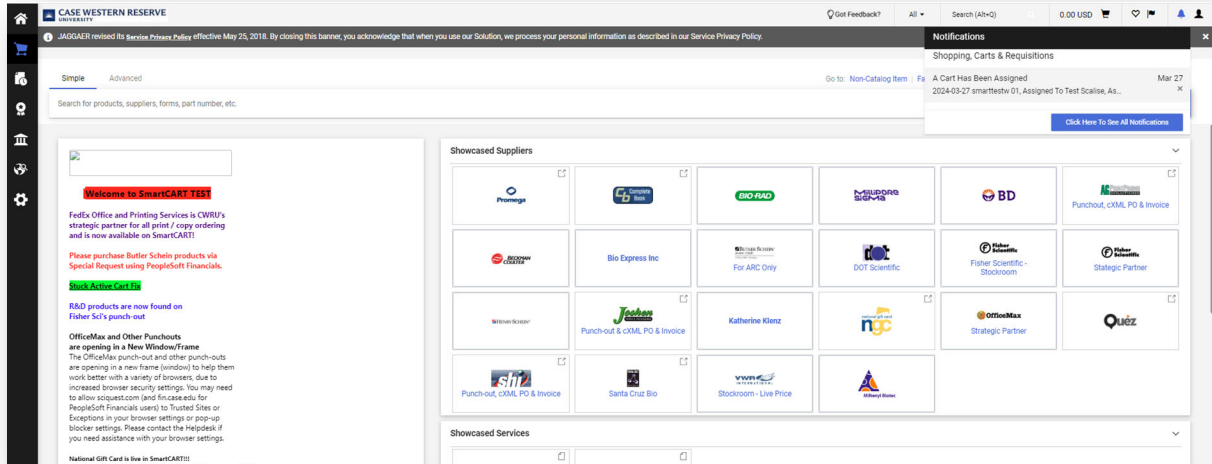
- Jaggaer SmartCART
- PeopleSoft Financials

Steps

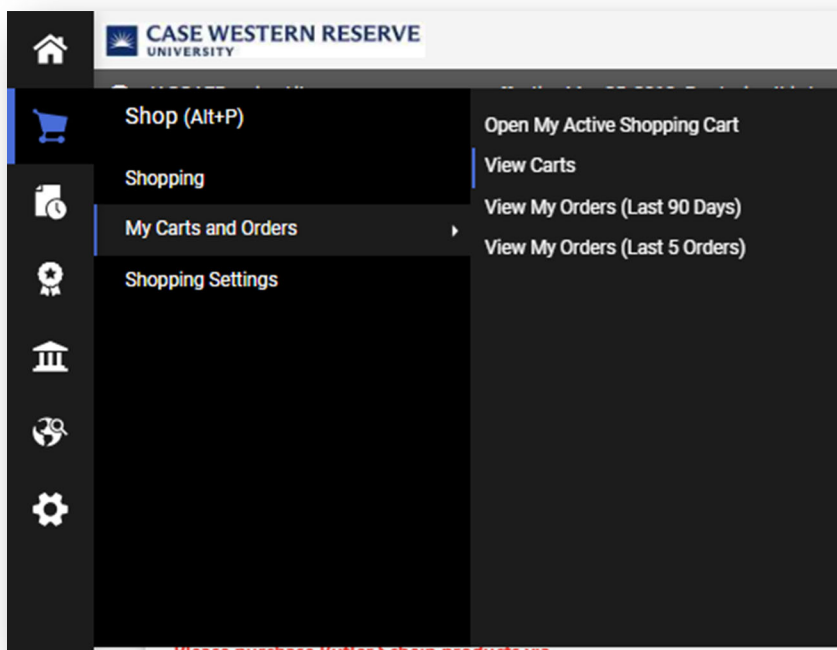
1. Access your SmartCART account:
 - a. Start by logging into PeopleSoft Financials
 - b. Navigate to the Requisitions page and click the SmartCART link. This will land on a new page. Click the SmartCART link which will open to the SmartCART landing page.
2. Check to determine if a cart has been assigned to you by using one of the two methods outlined below.

Note: You will receive an email when a cart has been assigned to you.

- a. Click the bell icon in the top right corner of the SmartCART welcome page. (This screen appears when you successfully log into SmartCART.) Click the notification “A cart has been assigned to you”. This takes you to the Assigned Carts menu.

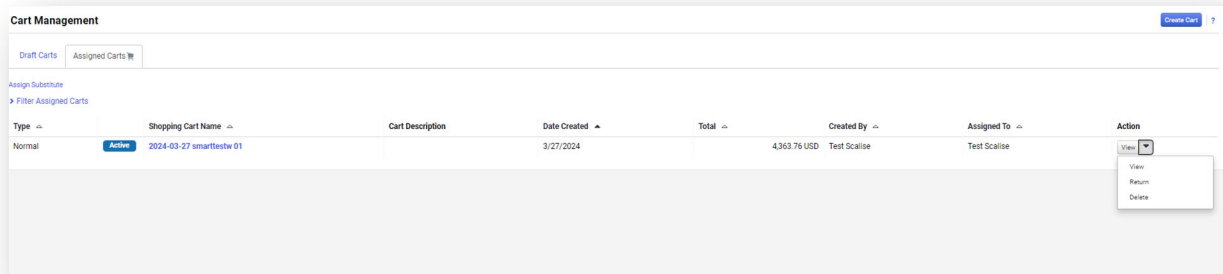


- b. Click the Shopping Cart icon in the left pane of the Welcome screen. Select My Carts and Orders > View Carts. On the Cart Management screen, click “Assigned Carts” to view the Assigned Carts menu.

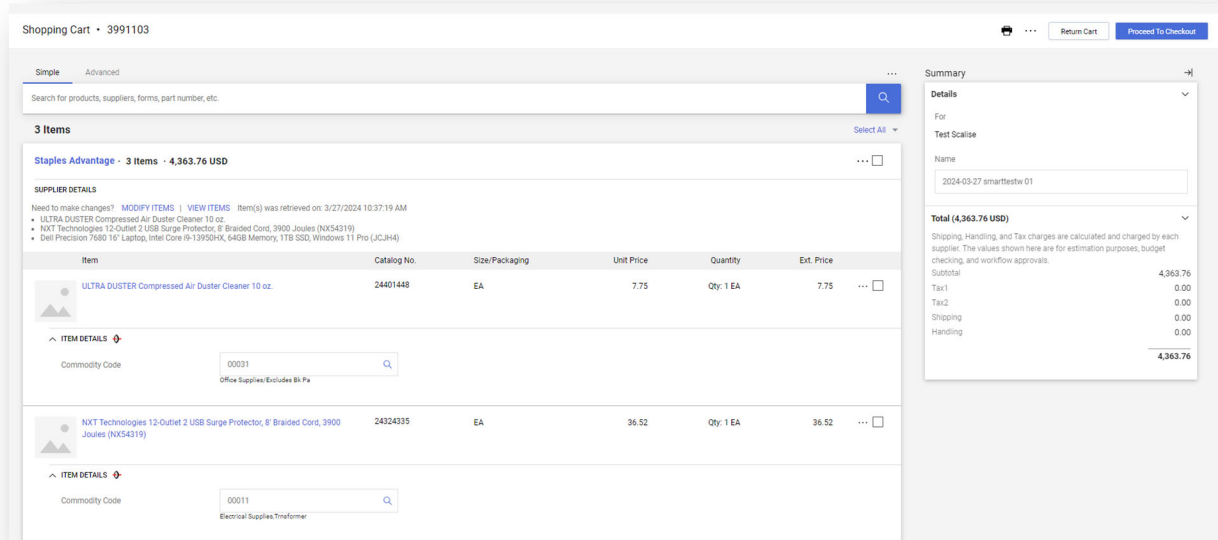


3. The Assigned Carts menu lists all the carts assigned to you. Use the Action field to select your desired action: “View”, “Return”, “Delete”.
 - a. “Return” sends the cart back to the window shopper and is best used when the window shopper needs to edit the cart.
 - b. “Delete” removes the cart from the system entirely.
 - c. “View” allows you to review the cart.

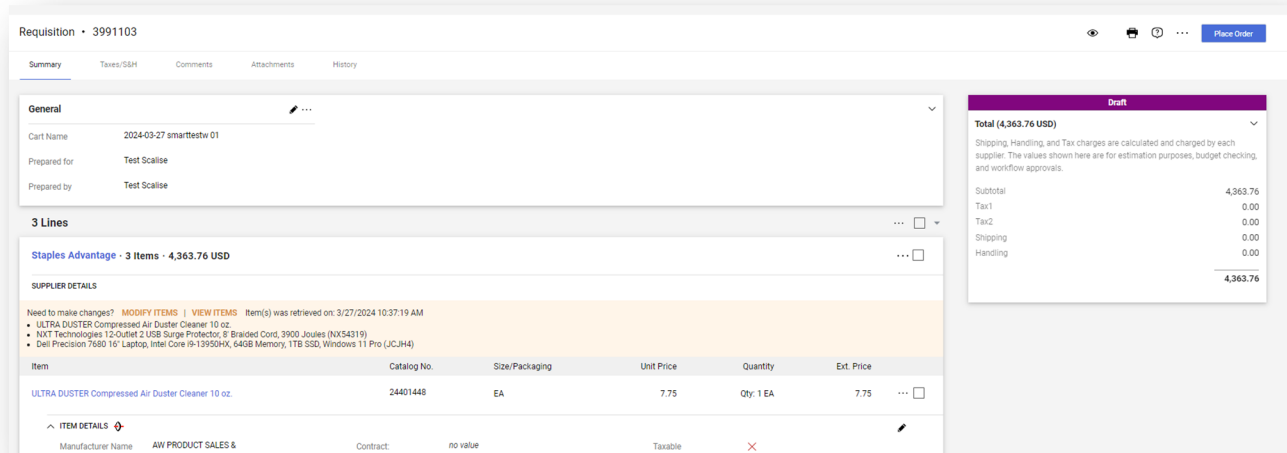
Note: You must view the cart before it can be approved.



4. Select “View” to review the cart. You have the option to “Return the Cart” or “Proceed To Checkout” by clicking the relevant buttons at the top of the screen.



5. Click “Place Order”.



Requisition • 3991103

Summary Taxes/SAH Comments Attachments History

General

Cart Name: 2024-03-27 smarttestw 01
Prepared for: Test Scalise
Prepared by: Test Scalise

3 Lines

Staples Advantage - 3 Items - 4,363.76 USD

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 3/27/2024 10:37:19 AM

- ULTRA DUSTER Compressed Air Duster Cleaner 10 oz.
- NXT Technologies 12-Outlet 2 USB Surge Protector, 8 Braided Cord, 3900 Joules (NX54319)
- Dell Precision 7680 16" Laptop, Intel Core i9-13950HX, 64GB Memory, 1TB SSD, Windows 11 Pro (JCJH4)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
ULTRA DUSTER Compressed Air Duster Cleaner 10 oz.	24401448	EA	7.75	Qty: 1 EA	7.75

ITEM DETAILS

Manufacturer Name: AW PRODUCT SALES & Contract: no value Taxable: X

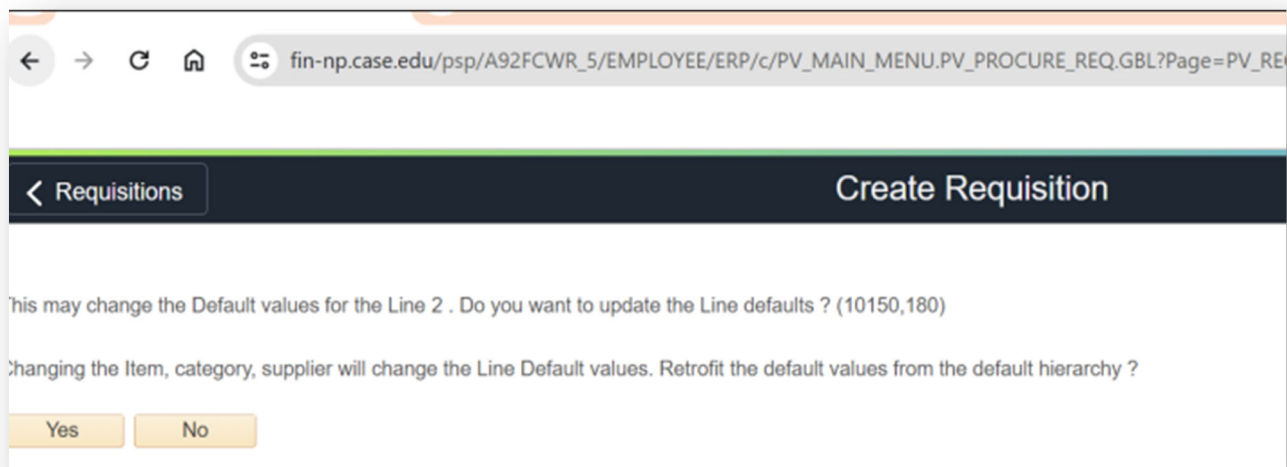
Draft

Total (4,363.76 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	4,363.76
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
Total	4,363.76

Note: You are taken back to PeopleSoft. If you encounter the error below, click “No”. You must click “No” for every line in the order.



fin-np.case.edu/psp/A92FCWR_5/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCURE_REQ.GBL?Page=PV_RE

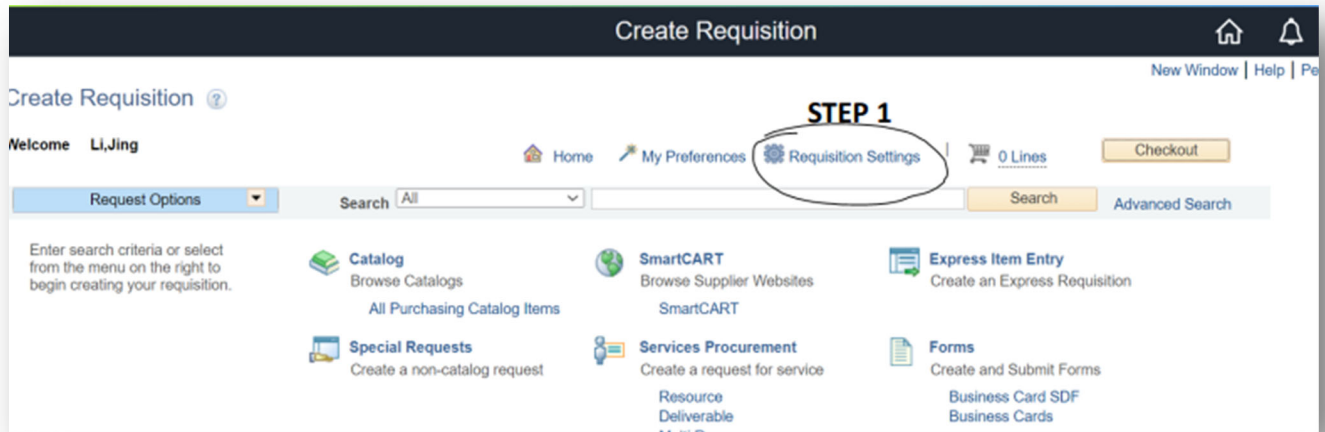
< Requisitions **Create Requisition**

This may change the Default values for the Line 2 . Do you want to update the Line defaults ? (10150,180)

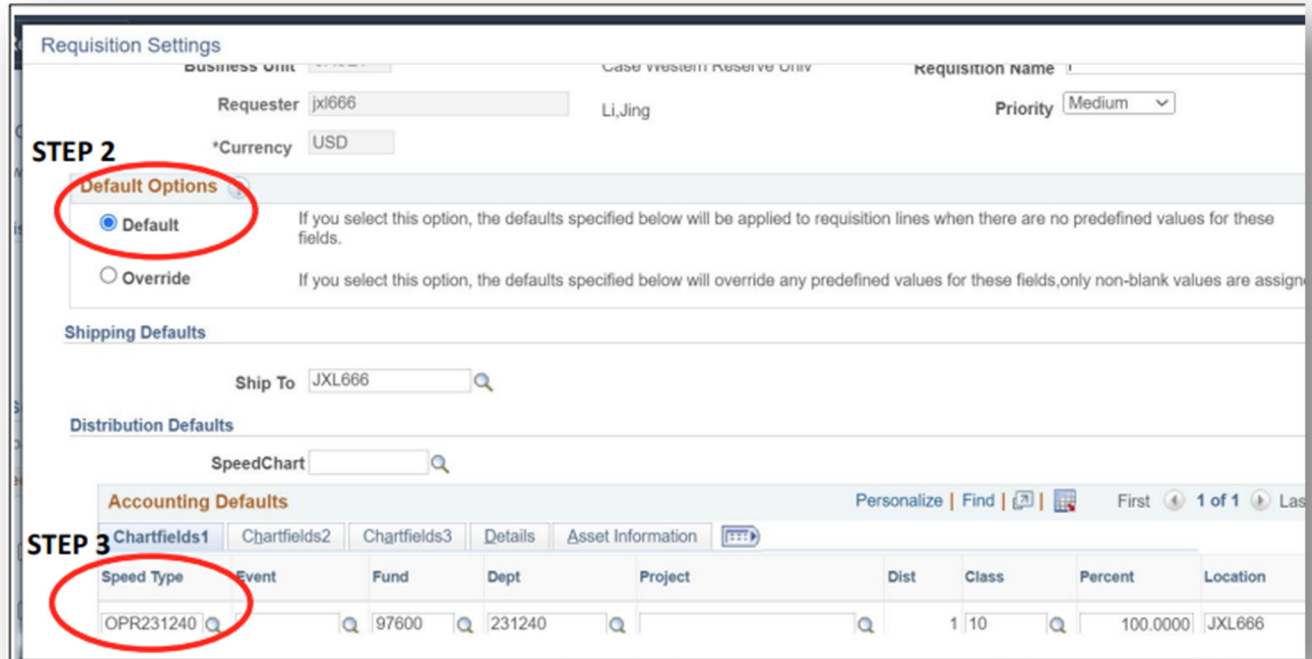
Changing the Item, category, supplier will change the Line Default values. Retrofit the default values from the default hierarchy ?

Yes **No**

6. Click the “Requisition Settings” link.



7. Select Default in the Default Options section.
8. Enter your speedtype in the SpeedType field in the Accounting Defaults section.
9. Click “OK”.



The screenshot shows the 'Requisition Settings' page. In the 'Default Options' section, the 'Default' radio button is selected and circled in red, labeled 'STEP 2'. Below this, there are sections for 'Shipping Defaults', 'Distribution Defaults', and 'Accounting Defaults'. In the 'Accounting Defaults' section, the 'Speed Type' field is circled in red and labeled 'STEP 3'. The 'Speed Type' field contains the value 'OPR231240'.

Speed Type	Event	Fund	Dept	Project	Dist	Class	Percent	Location
OPR231240		97600	231240		1	10	100.0000	JXL666

10. Complete the order by budget checking the requisition. Once budget check has completed, submit the requisition by clicking “Save and Submit” at the bottom of the page. You have successfully submitted the requisition for approval through the PeopleSoft approval workflow.



Audit History

Next Audit Target Date:	
Audit Date:	
Audited by (Name and Title):	
Audit Updates/Notes:	