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

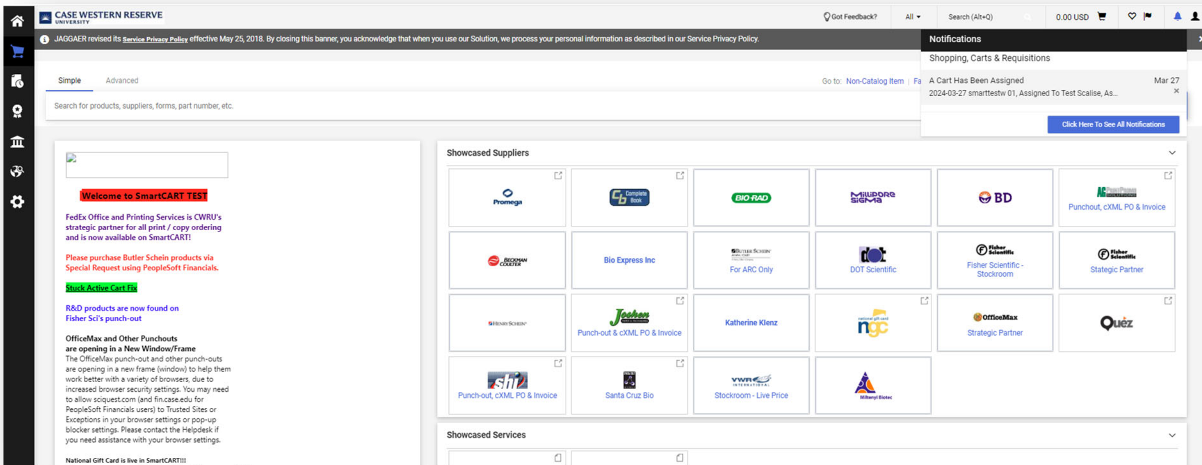
- Jaggaer SmartCART
- PeopleSoft Financials

Steps

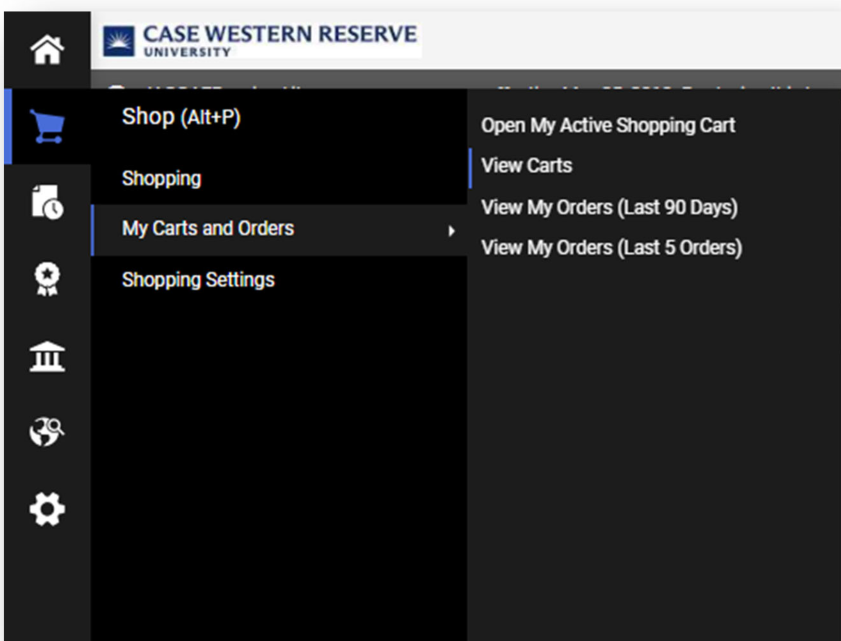
1. Access your SmartCART account:
   a. Start by logging into PeopleSoft Financials
   b. Navigate to the Requisitions page and click the SmartCART link. This will land on a new page. Click the SmartCART link which will open to the SmartCART landing page.
2. Check to determine if a cart has been assigned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

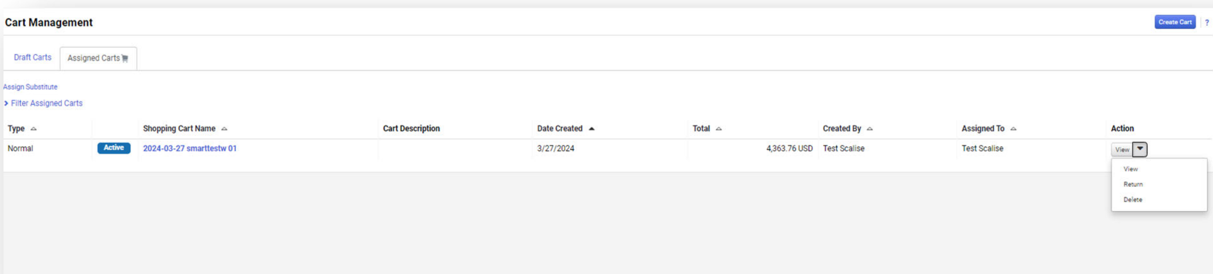


b. Click the Shopping Cart icon in the left pane of the Welcome screen. Select My Carts and Orders > View Carts. On the Cart Management screen, click "Assigned Carts" to view the Assigned Carts menu.

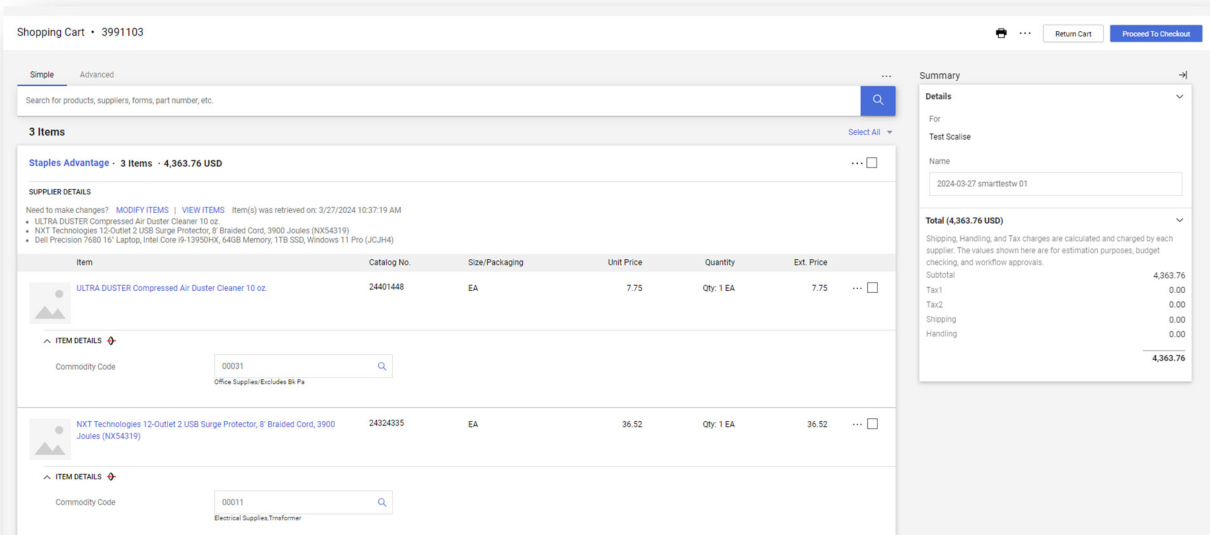


3. The Assigned Carts menu lists all the carts assigned to you. Use the Action field to select your desired action: “View”, “Return”, “Delete”.
   a. “Return” sends the cart back to the window shopper and is best used when the window shopper needs to edit the cart.
   b. “Delete” removes the cart from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

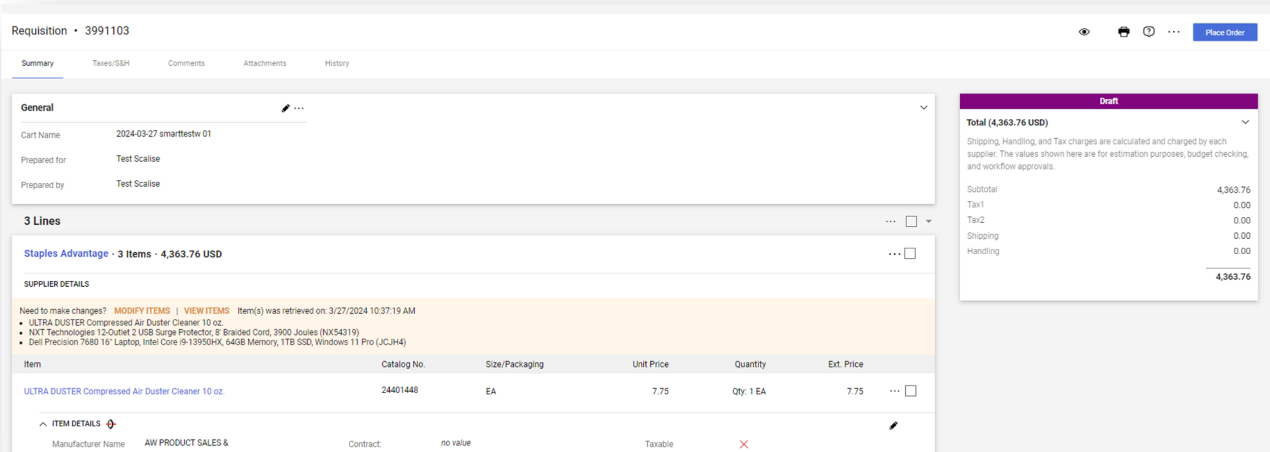
   Note: You must view the cart before it can be approved.



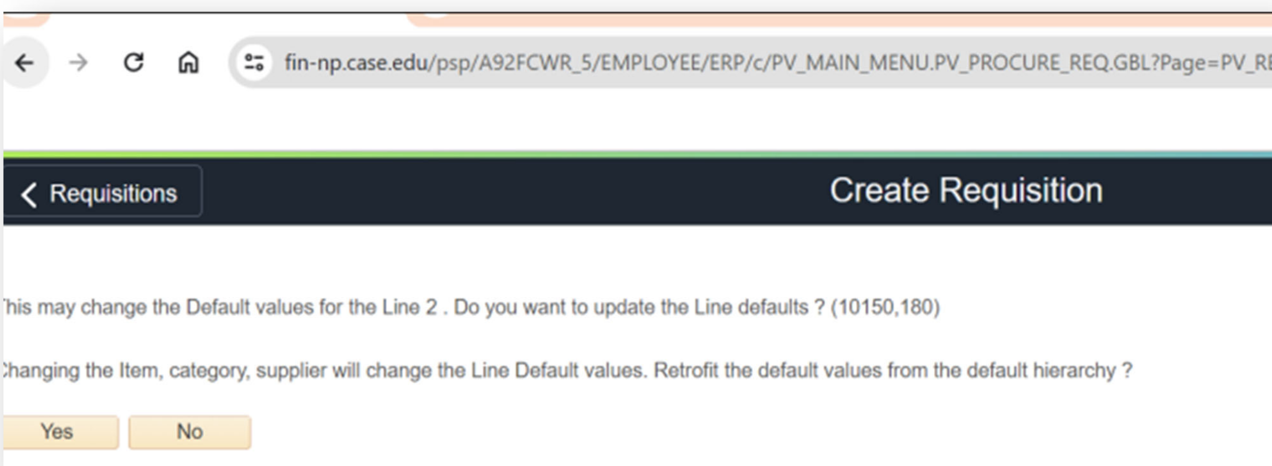
4. Select “View” to review the cart. You have the option to “Return the Cart” or “Proceed To Checkout” by clicking the relevant buttons at the top of the screen.



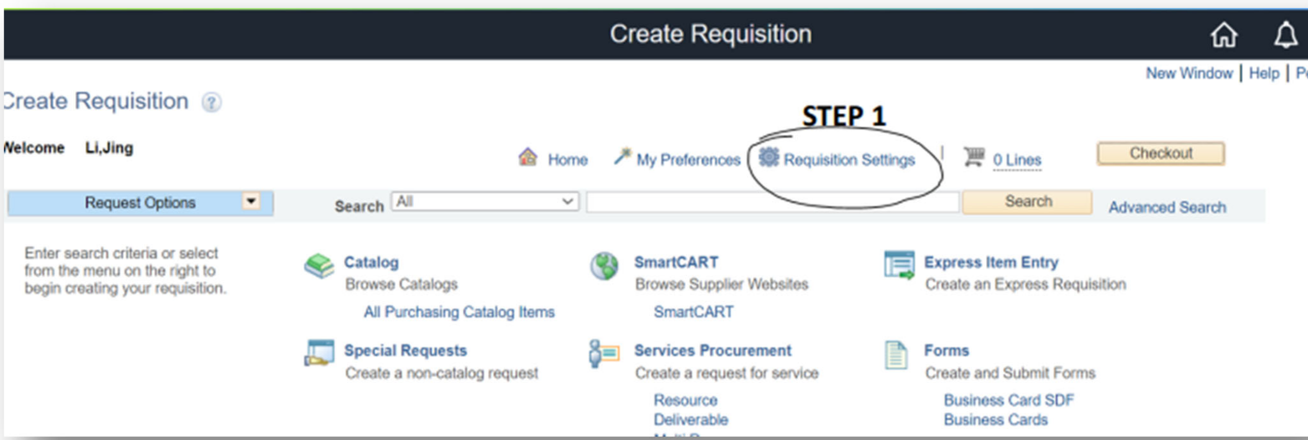
5. Click "Place Order".



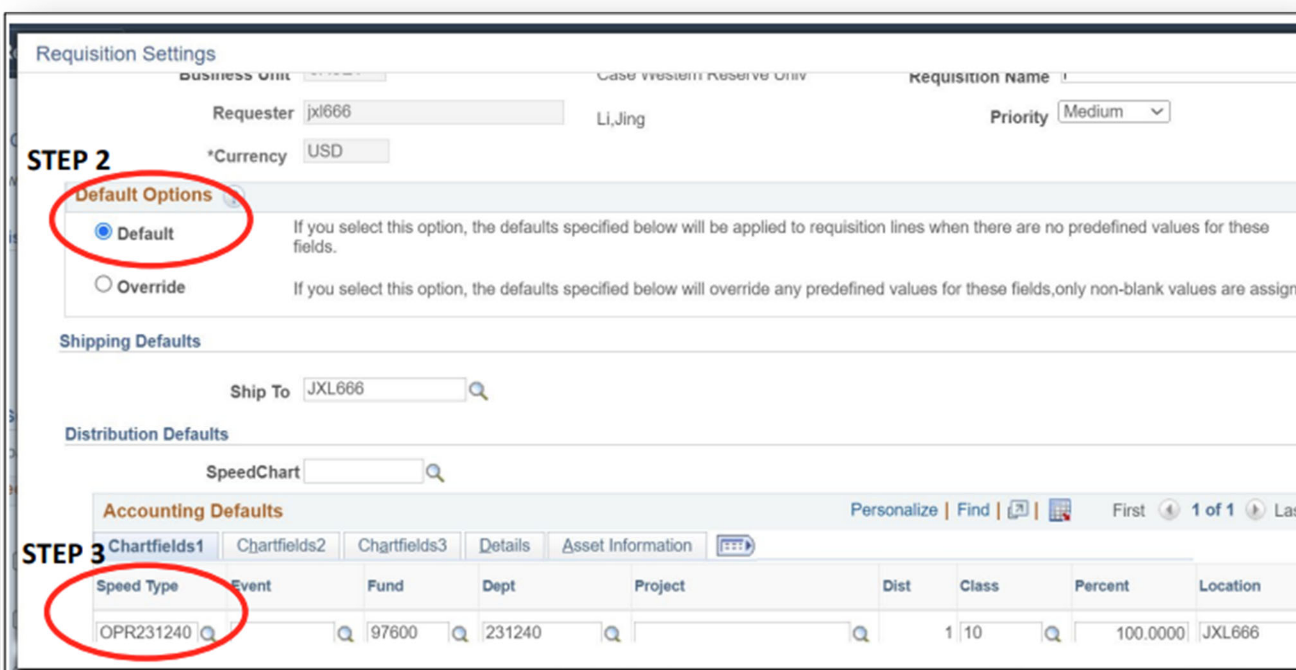
Note: You are taken back to PeopleSoft. If you encounter the error below, click "No". You must click "No" for every line in the order.



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”.



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:	