

## SmartCART – Order as a SmartCART Requester

### Purpose

This document outlines the steps for SmartCART users with a requester role to shop in SmartCART.

### Responsibility

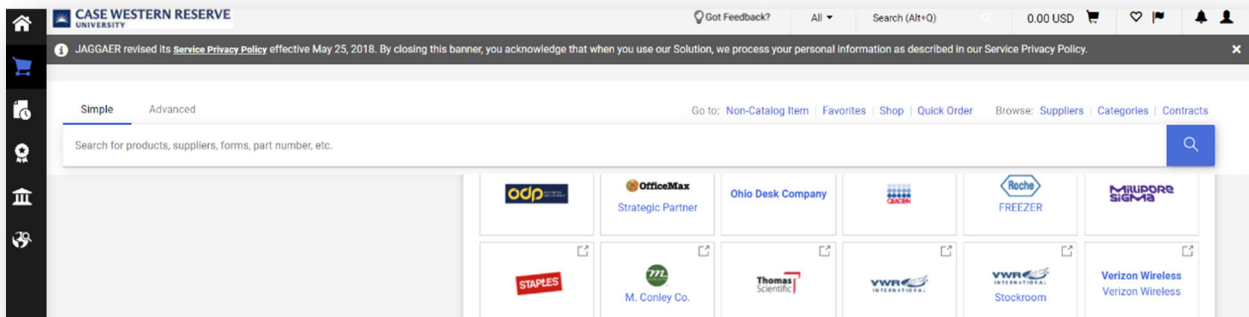
- **University Office:** Procurement & Distribution Services
- **Official:** Chief Procurement Officer
- **Team:** ERP/SmartCART
- **Role that Completes the Process:** SmartCART Requester
- **Process Auditor/Frequency:** Director of Operations/Biannual
- **Established:** March 2024

### Associated Systems/Computer Programs

- Jaggaer SmartCART
- PeopleSoft Financials

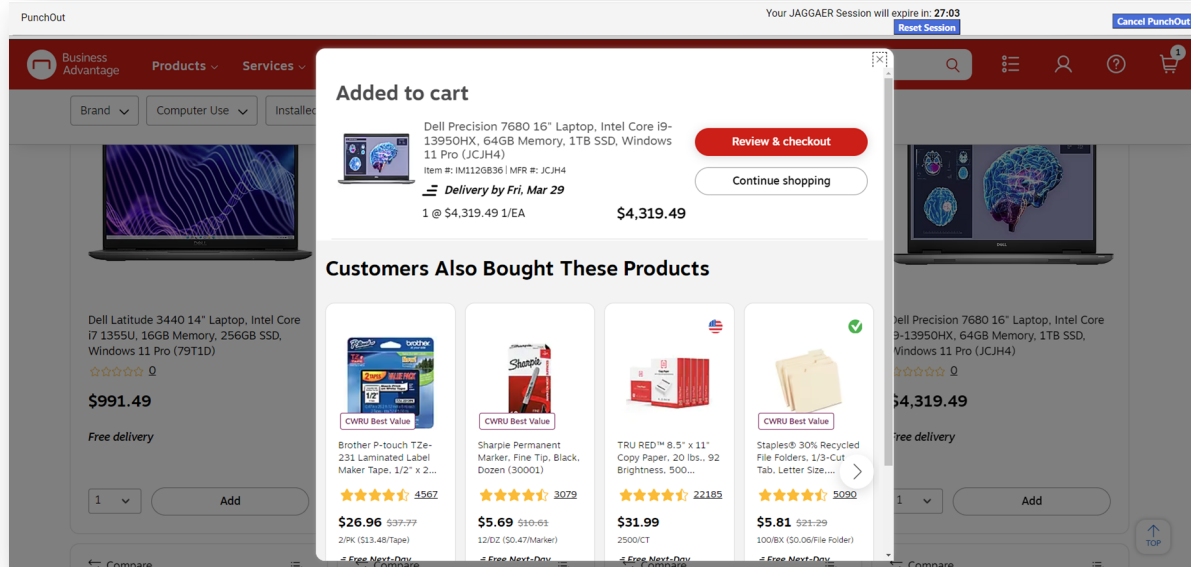
## Steps

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. Navigate to the Showcase section of the SmartCART landing page to view supplier icons.
  - a. Select a supplier icon to search the products of a specific supplier
  - b. Search by item name or description from all suppliers using the Simple search bar

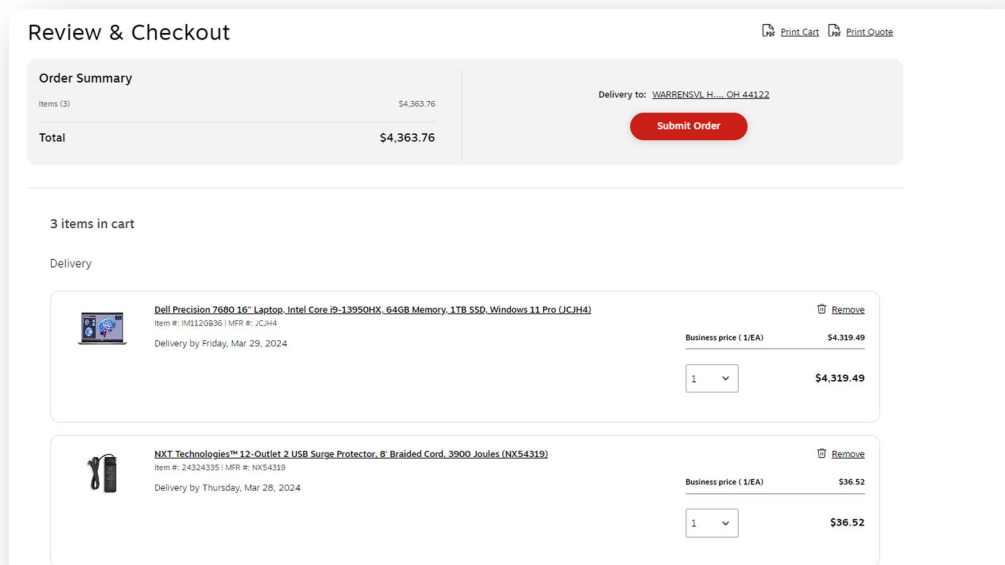


Note: Some suppliers have Punchout catalogs. For these suppliers, you are routed to the supplier's website to shop.

3. Select and add items to your shopping cart.
4. Once you are ready to submit the order, click the shopping cart to “Review & Checkout”.

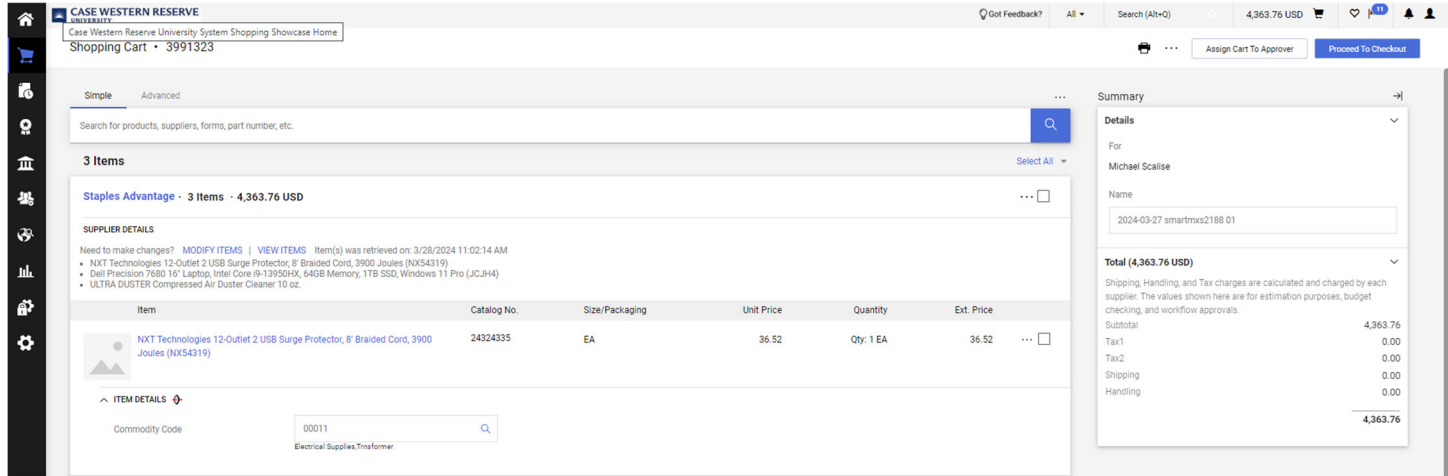


5. Click “Submit Order”.



Note: If shopping on a punchout catalog, you will return from the supplier’s website back to the SmartCART website.

6. Click the “Proceed To Checkout” button located at the top right of the screen.



**CASE WESTERN RESERVE UNIVERSITY**  
Case Western Reserve University System Shopping Showcase Home  
Shopping Cart • 3991323

Got Feedback? All Search (Alt+Q) 4,363.76 USD

Assign Cart To Approver **Proceed To Checkout**

Simple Advanced

Search for products, suppliers, forms, part number, etc.

**3 Items** Select All

**Staples Advantage • 3 Items • 4,363.76 USD**

**SUPPLIER DETAILS**

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 3/26/2024 11:02:14 AM

- 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)
- ULTRA DUSTER Compressed Air Duster Cleaner 10 oz.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
NXT Technologies 12-Outlet 2 USB Surge Protector, 8' Braided Cord, 3900 Joules (NX54319)	2432435	EA	36.52	Qty: 1 EA	36.52

**ITEM DETAILS**

Commodity Code 00011 Electrical Supplies,Transformer

**Summary**

**Details**

For Michael Scalise

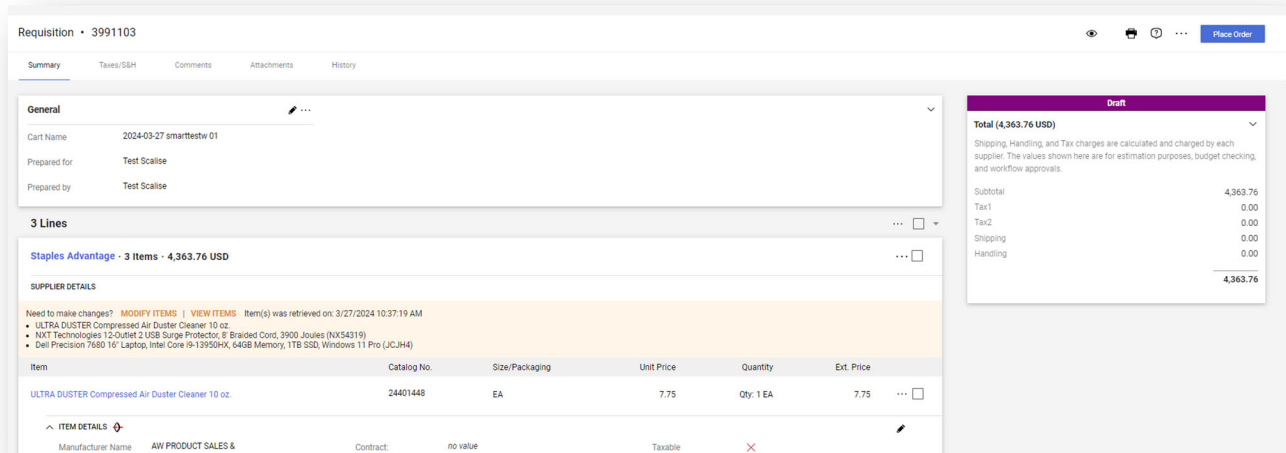
Name 2024-03-27 smartmxs2188 01

**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
<b>Total</b>	<b>4,363.76</b>

7. Click “Place Order”.



**Requisition • 3991103**

Summary Taxes/SGH Comments Attachments History

**General**

Cart Name 2024-03-27 smartmxs2188 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 A/W 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
<b>Total</b>	<b>4,363.76</b>

**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.



The screenshot shows a web browser window with the URL `fin-np.case.edu/psp/A92FCWR_5/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_PROCURE_REQ.GBL?Page=PV_RE`. The page title is "Create Requisition". Below the title bar, there is a confirmation message: "This may change the Default values for the Line 2 . Do you want to update the Line defaults ? (10150,180)". Below this message, there is another line of text: "Changing the Item, category, supplier will change the Line Default values. Retrofit the default values from the default hierarchy ?". At the bottom of the dialog, there are two buttons: "Yes" and "No".

9. Click the “Requisition Settings” link.

The screenshot shows the "Create Requisition" page. The page title is "Create Requisition". Below the title bar, there is a navigation bar with links: "Home", "My Preferences", "Requisition Settings", "0 Lines", and "Checkout". The "Requisition Settings" link is circled and labeled "STEP 1". Below the navigation bar, there is a search bar with the text "Search All" and a "Search" button. Below the search bar, there is a grid of links: "Catalog" (Browse Catalogs, All Purchasing Catalog Items), "SmartCART" (Browse Supplier Websites, SmartCART), "Express Item Entry" (Create an Express Requisition), "Special Requests" (Create a non-catalog request), "Services Procurement" (Create a request for service, Resource, Deliverable, Multi-P), and "Forms" (Create and Submit Forms, Business Card SDF, Business Cards).

10. Select Default in the Default Options section.
11. Enter your speedtype in the SpeedType field in the Accounting Defaults section.
12. Click “OK”.



Requisition Settings

Business Unit: Case Western Reserve Univ. Requisition Name: Requester: jxl666 Li, Jing Priority: Medium \*Currency: USD

**STEP 2**

**Default Options**

☒ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

☐ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Shipping Defaults**

Ship To: JXL666

**Distribution Defaults**

SpeedChart:

**Accounting Defaults**

Personalize | Find | First 1 of 1 Last

**STEP 3**

Chartfields1 Chartfields2 Chartfields3 Details Asset Information

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

13. 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:	