



CASE WESTERN RESERVE  
UNIVERSITY EST. 1826

# **SmartCART Manual**

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## SmartCART

SmartCART (Convenient Advanced Requisitioning Tool) is a software tool that consolidates the ordering of those things that you need to get your job done. How does it work? Think Amazon.com...one place where multiple vendors will list their products so your transaction and invoicing is automatic.

The SmartCART system went live on campus May 2010. The system has various vendors to purchase items. The Punchout Catalogs are those that go directly to the company website and allow a user to purchase items online and then pull that information back into the SmartCART system and ultimately create a requisition in the Financials system. The Hosted Catalogs are vendors that have catalogs, similar to a paper catalog, that you can search across and are specific to CWRU.

The SmartCART system also has a Window Shopper feature. This allows users who do not have access to Financials to create a cart and then assign that cart to their approver to create the requisition and buy the product(s). Window Shoppers can be set up by filling out the form on the eProcurement and Distribution website and completing training to gain access to the system.

Ultimately, the SmartCART system will have 40 vendors.

In addition, items ordered through SmartCART will not require a buyers approval. Therefore, expediting the approval and Purchase Order process. The workflow is based on the existing workflow that has been set up for your department.

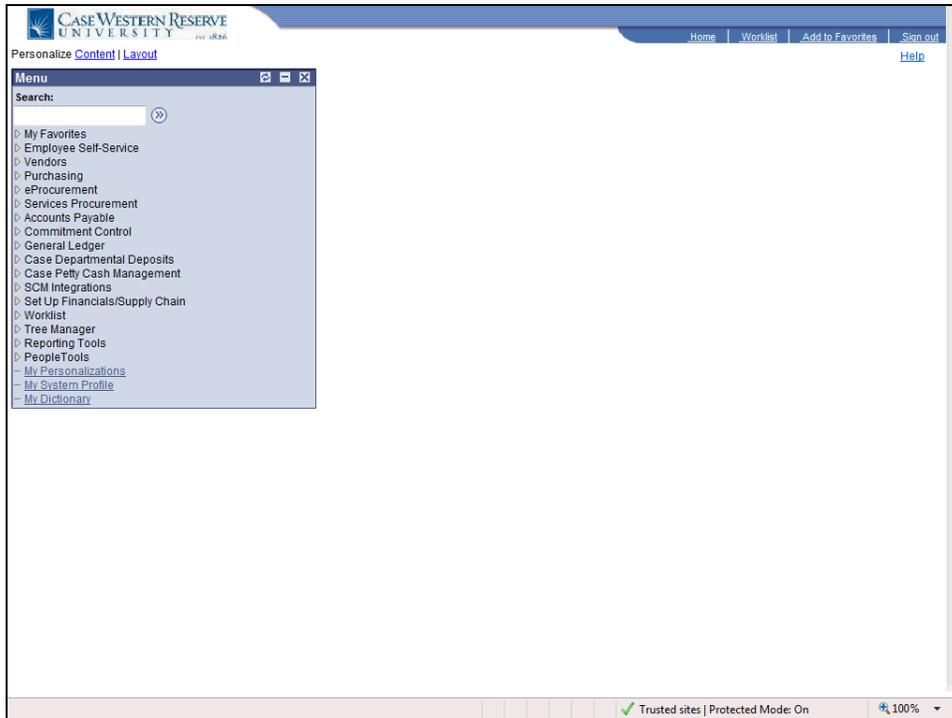
For more information, please see the Procurement and Distribution website at <http://campusservices.case.edu/PDSHome.aspx>

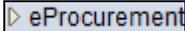
## Using the SmartCART system

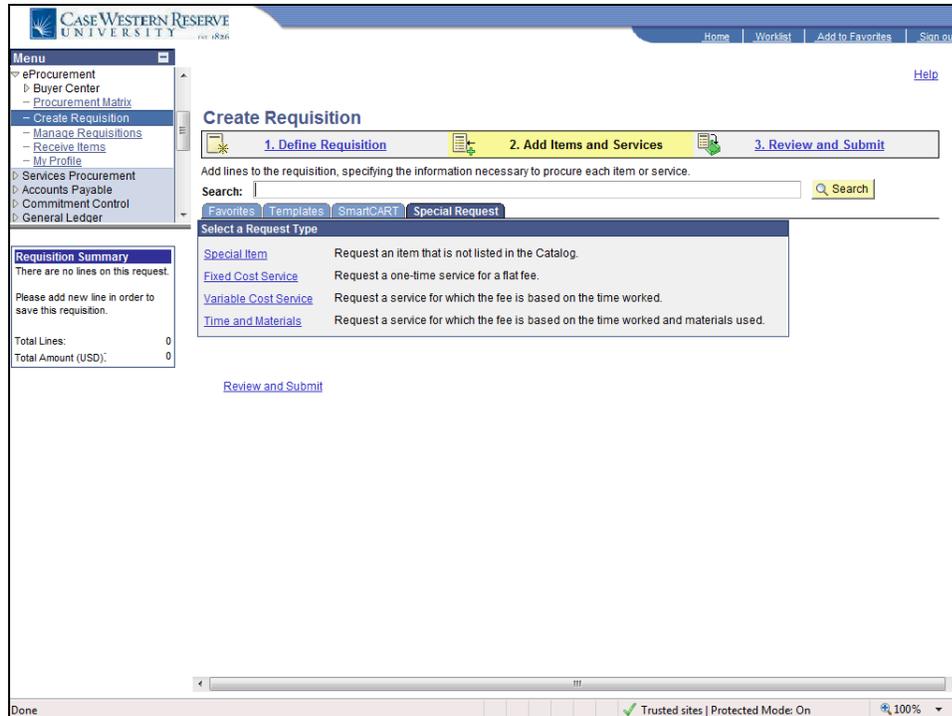
This section reviews the SmartCART screen(s) and the various options that are available to shop in the SmartCART system.

### Procedure

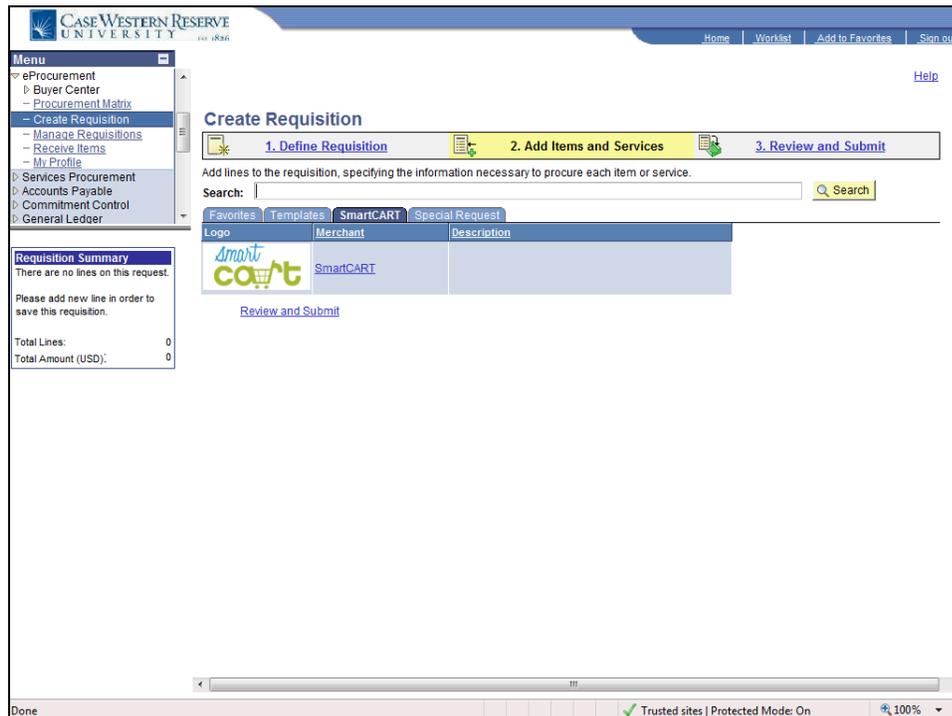
To navigate to SmartCART, login to PeopleSoft Financials.



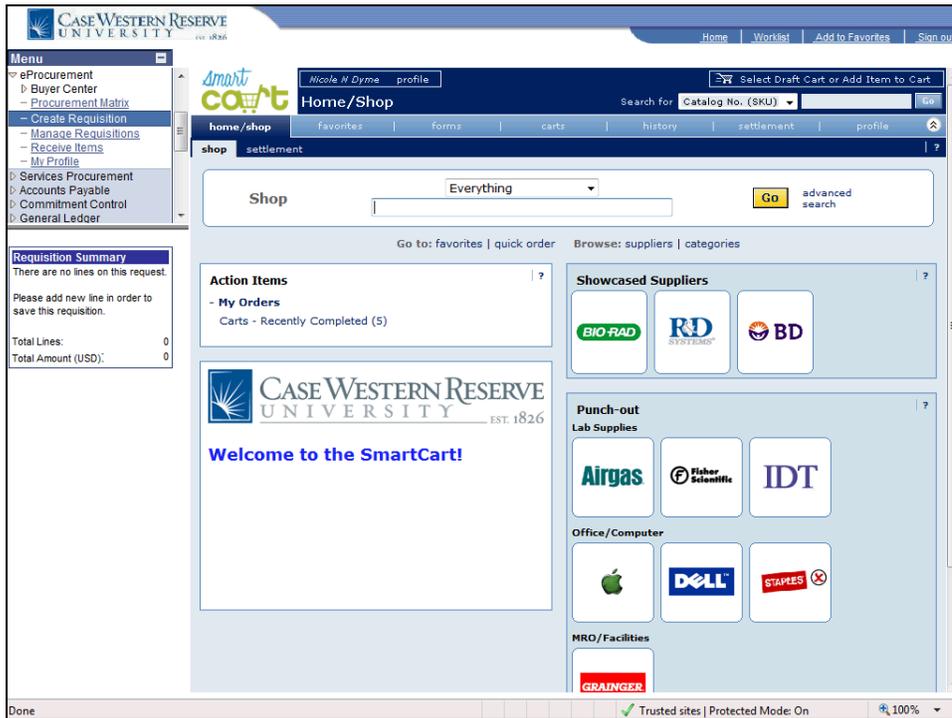
Step	Action
1.	Click the <b>eProcurement</b> link. 
2.	Click the <b>Create Requisition</b> link. 
3.	The Create Requisition screen appears.  Click the <b>2. Add Items and Services</b> link. 



Step	Action
4.	Click the <b>SmartCART</b> tab. 



Step	Action
5.	Click the <b>SmartCART</b> link. <a href="#">SmartCART</a>



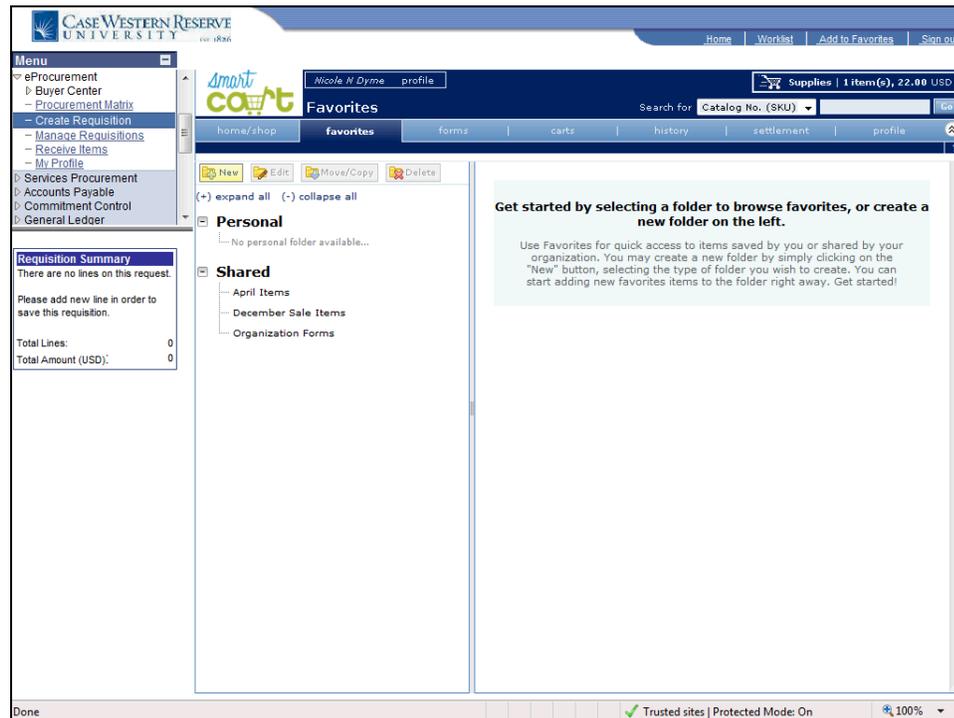
Step	Action
6.	The SmartCART home page appears. <a href="#">suppliers</a>

 SmartCART is now within the PeopleSoft Financials system. The left Financials Menu stays in the left corner. You may minimize the menu by clicking the - button on the top right.

The Requisition Summary is on the left side and will populate with the items that you purchase from SmartCART in the same way it does when a requisition is created for a Special Item in Financials.

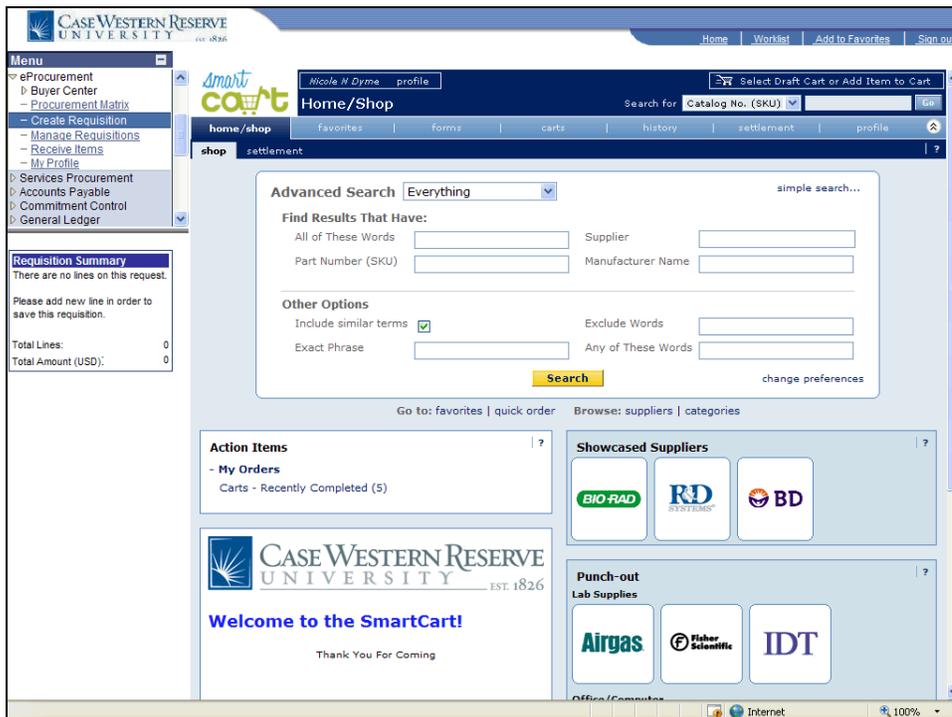
Step	Action
7.	The <b>home/shop</b> link will always bring you back to the Home page.

Step	Action
8.	The <b>favorites</b> item shows a view of those items that you have marked as favorites for the ease of frequent purchasing. 

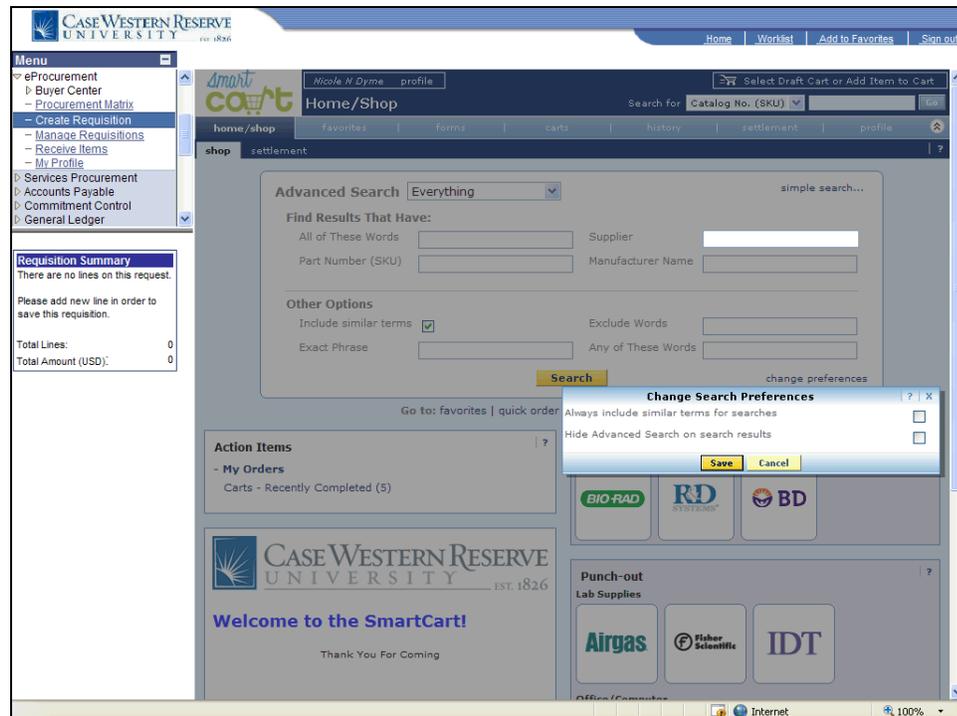


Step	Action
9.	The <b>favorites</b> area works similar to your file Explorer on your computer. <b>Personal</b> are those favorites that have been selected by the user. <b>Shared</b> are those that have been posted by Procurement to highlight items or vendors.
10.	The <b>carts</b> item will allow you view your active carts, draft carts, carts that are assigned to you by a window shopper, favorites you have selected, and your recent purchases.
11.	The <b>history</b> item, allows you to search by PO, Cart, purchase order, or invoice. These items are historical. Active and draft carts and purchases are not viewed here.
12.	The <b>Showcased Suppliers</b> box shows those suppliers that Procurement has chosen to highlight. They may be new vendors or vendors having specials for that month.
13.	<b>Punch-out</b> suppliers are listed by category, those listed are the most popular vendors in their category.  More punchout suppliers may be available than are listed on the home page.  Use the <b>Browse: suppliers</b> link to see all suppliers available in SmartCART.

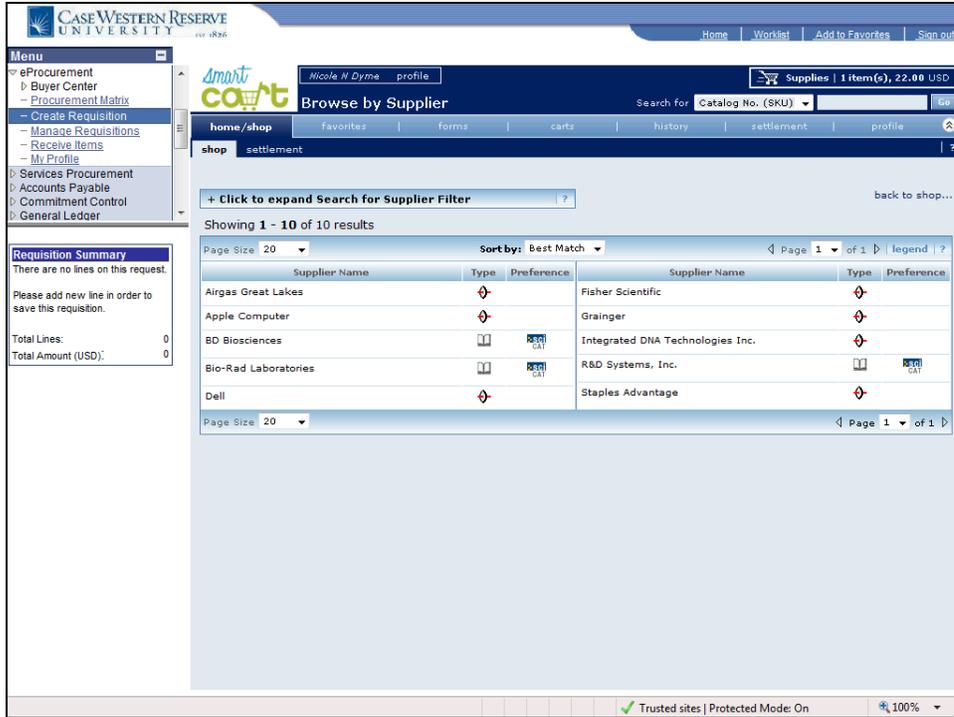
Step	Action
14.	<p>The <b>Action Items</b> box shows on the SmartCART home page when orders have been completed or carts that have been assigned to you.</p> <p><u>Completed</u> orders are those that have been Placed and a requisition created in PeopleSoft Financials.</p> <p><u>Assigned Carts</u> are those that have been Assigned to you for approval and purchase from a Window Shopper.</p>
15.	<p>The <b>Welcome box</b> will contain messages from Procurement for SmartCART users. Messages can include, but are not limited to, new vendor information, specials from a vendor, or notices to users.</p>
16.	<p>The <b>Cart icon</b> and information on the top right of the home page will contain information about the cart that is being created. Information includes, the name of the cart (default or custom), number of items and the total dollar amount purchased.</p>
17.	<p>The <b>Search for</b> area, will allow searching in hosted catalogs only. These catalogs are hosted within the system. Searching punchout catalogs is not available from the SmartCART system since these catalogs leave SmartCART and enter the vendor website.</p>
18.	<p>Another area for searching is the "<b>Shop at the Top</b>" option. This is for <u>hosted catalogs</u> only. Search by category using the drop down and selecting or search using the Everything category.</p>
19.	<p>To utilize searching for all options which includes partial searches of your keyword. Click the <b>advanced search</b> link.</p>



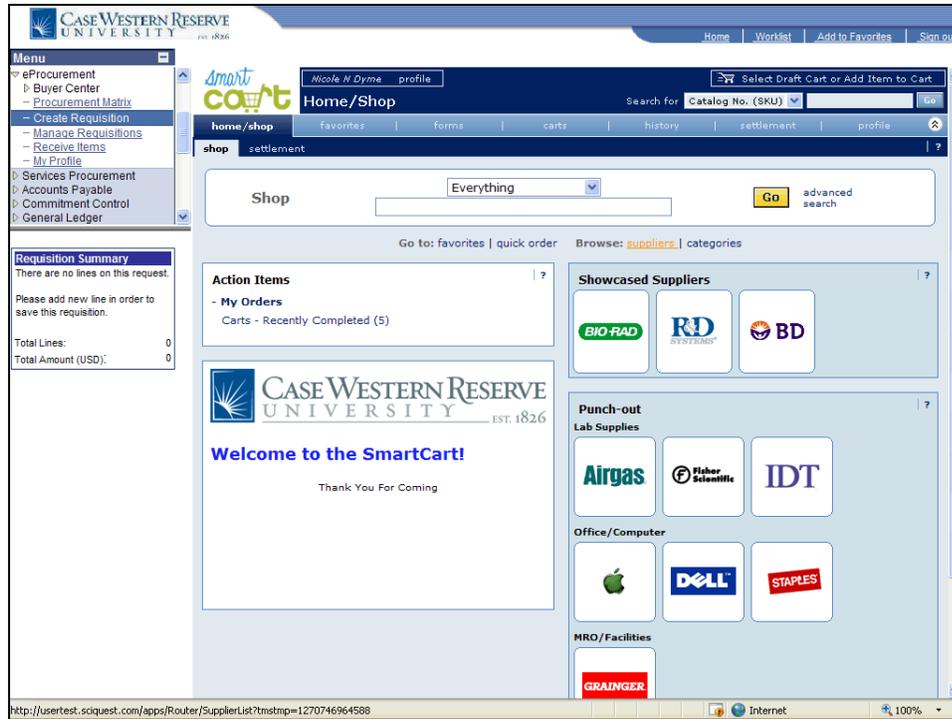
Step	Action
20.	The <b>advanced search</b> options will open. The first time you search, change your preferences. Click the <b>change preferences</b> link on the bottom right of the search area. <a href="#">change preferences</a>



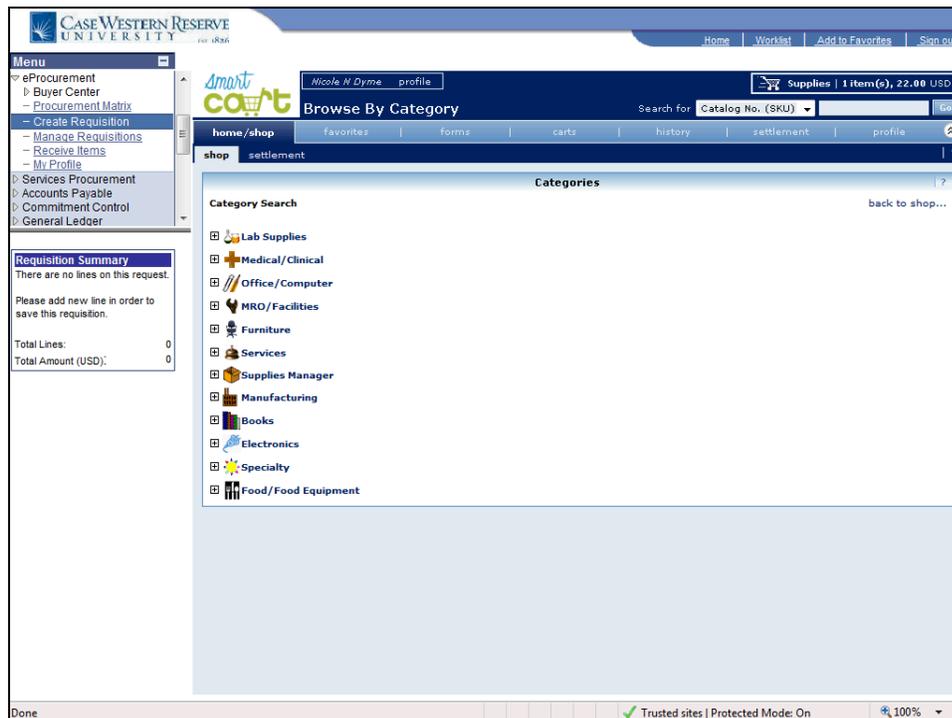
Step	Action
21.	A new box <b>Change Search Preferences</b> will open. Click the check box, <b>Always include similar terms for searches</b> option.
22.	Click the <b>Save</b> button. 
23.	Note the <b>Preferences Saved</b> text in the bottom right of the Advanced Search box.
24.	To return to the <i>"Shop at the Top"</i> box, click <b>simple search...</b> in the top right of the Advanced Search box.
25.	To see all vendors and suppliers in SmartCART, click the <b>suppliers</b> link next to Browse:.



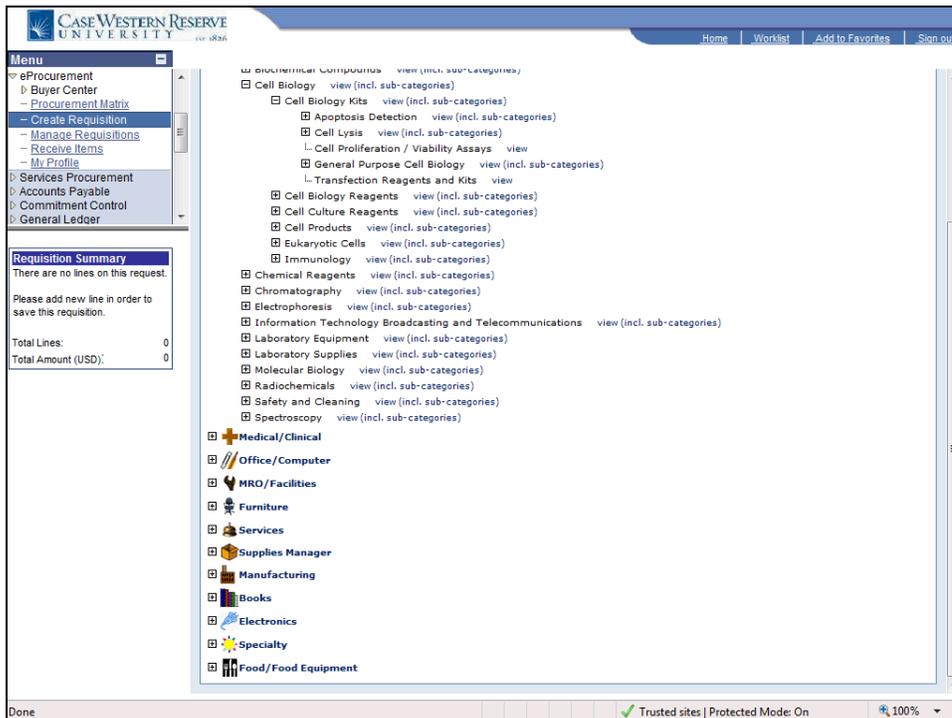
Step	Action
26.	The list of vendors page opens. <b>Punch-out Suppliers</b> are indicated by the arrow through the bullseye icon.
27.	<b>Hosted Catalog Suppliers</b> are indicated by an open book icon.
28.	To return, click the <b>back to shop...</b> link in the top right of the page. <a href="#">back to shop...</a>



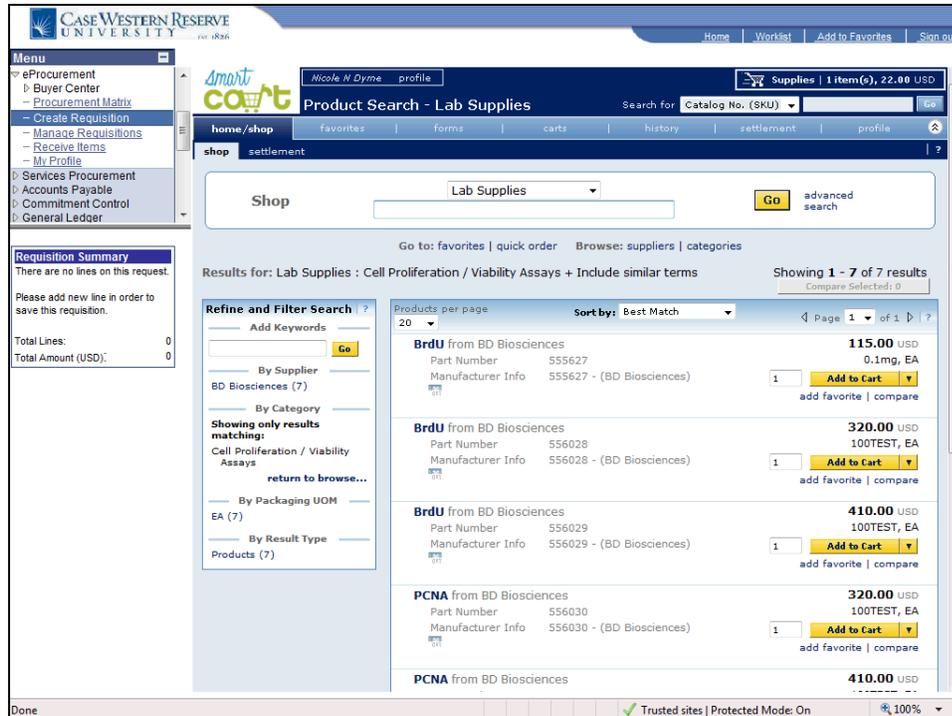
Step	Action
29.	To see items to purchase by category, click the <b>categories</b> link next to the <b>Browse:</b> .



Step	Action
30.	The Categories screen appears. Each category can be expanded and drilled down for more detail. For our example, click the <b>Lab Supplies</b> + button. 
31.	The category, becomes finer by smaller categories. For our example, click the <b>Cell Biology</b> + button. 
32.	To drill down further, click the <b>Cell Biology Kits</b> link.



Step	Action
33.	Note as you drill down, the view link and view (incl. sub-categories) link. In our example we will click an item that does not have sub categories by clicking the <b>view</b> link. 



Step	Action
34.	<p>The SmartCART home pages appears with items from the hosted catalogs that match the category(ies) that we chose.</p> <p>To return to the Home Page you can click <a href="#">home/shop</a>.</p>
35.	<p>Users should now be familiar with the SmartCART Home page, links, and location of items.</p> <p><b>End of Procedure.</b></p>

## Viewing Vendors and new vendors

This section explains how to find and view vendors in the SmartCART system. Vendors will be added regularly to SmartCART throughout the year. There will be a maximum of 40 vendors in SmartCART by 2011.

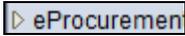
New vendors will be advertised in The Daily email newsletter and on the Procurement and Distribution website at <http://campusservices.case.edu/PDSHome.aspx>

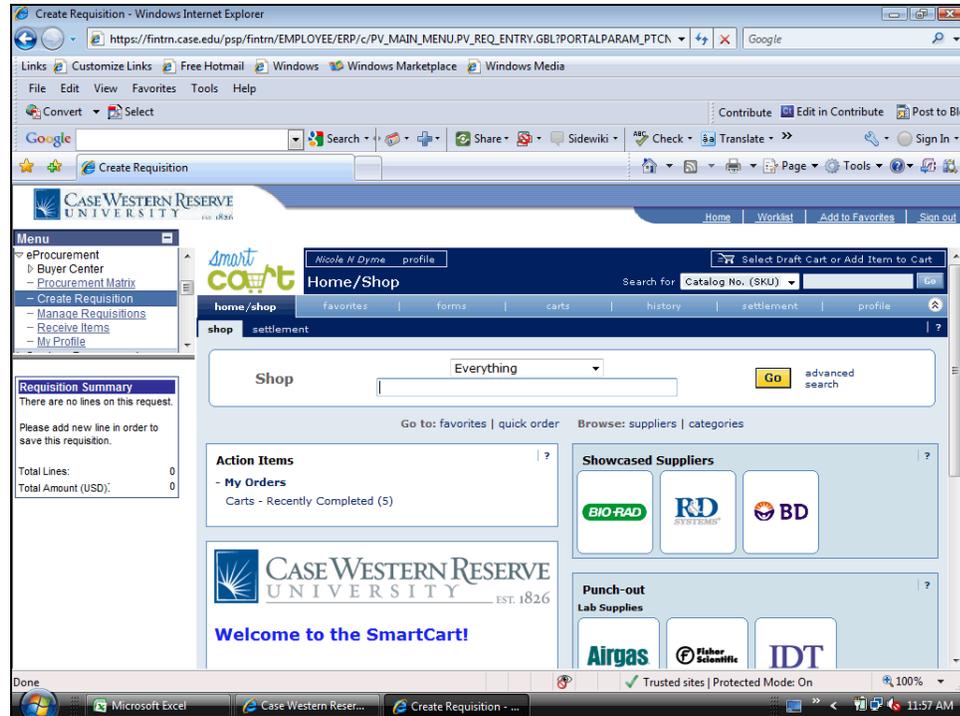
If you have vendors you would like to suggest for SmartCART please email [smartcart@case.edu](mailto:smartcart@case.edu) with the information about the vendor and details about how often purchases are made from that vendor.

### Procedure

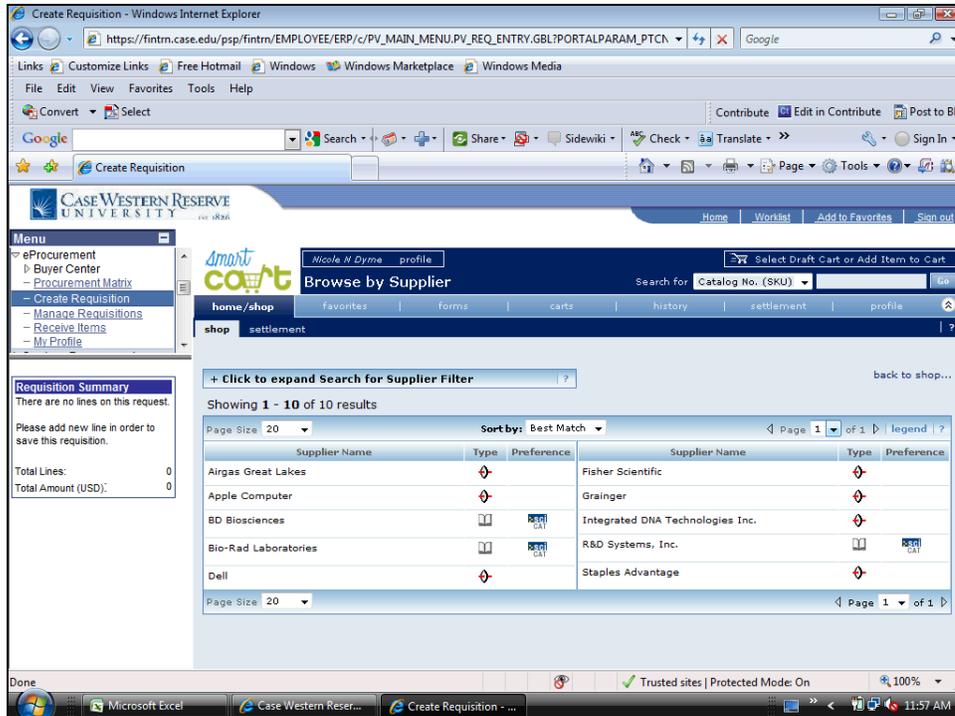
To begin, log into Financials.

Follow the steps to navigate to the SmartCART Home page.

Step	Action
1.	<p>To access SmartCART follow the steps to Create a Requisition.</p> <p>Click the <b>eProcurement</b> link in the Menu. Click <b>Create Requisition</b>. Click <b>2. Add Items and Services</b> Click <b>SmartCART tab</b> Click <b>SmartCART link</b>.</p> 



Step	Action
2.	<p>The SmartCART Home page appears.</p> <p>Showcased Suppliers are those suppliers that Procurement has chosen to highlight. They may be new vendors or those having specials for that month.</p> <p><b>Showcased Suppliers</b></p>
3.	<p><b>Punch-out</b> suppliers are listed by category, those listed are the most popular vendors in their category.</p> <p>More punchout suppliers may be available than are listed on the home page.</p> <p><b>Punch-out</b></p>
4.	<p>Click the <b>suppliers</b> link to see the full list of suppliers that are available in the SmartCART system.</p> <p><b>Browse: suppliers</b></p>



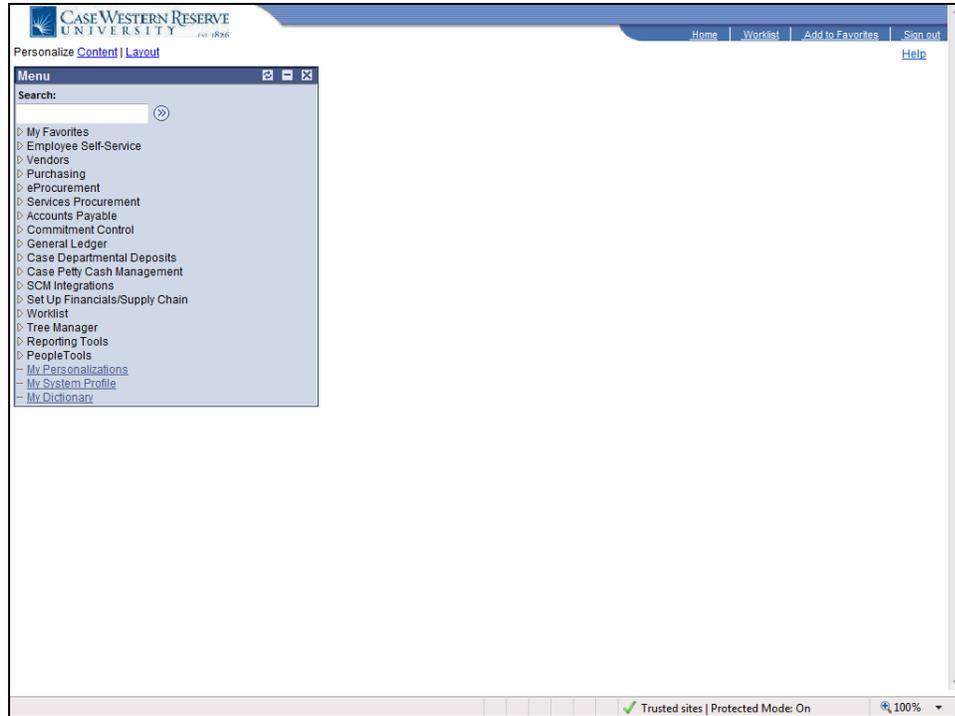
Step	Action
5.	<b>Punch-out Suppliers</b> are indicated by an icon that looks like an arrow through a bullseye.
6.	<b>Hosted Catalog Suppliers</b> are indicated by a open book icon.
7.	New vendors will be posted here as well as on the Procurement and Distribution website at <a href="http://campusservices.case.edu/PDSHome.aspx">http://campusservices.case.edu/PDSHome.aspx</a>  They will also be announced in The Daily email newsletter. <b>End of Procedure.</b>

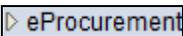
## Ordering from a Hosted Catalog

Hosted Catalogs are catalogs from suppliers that are hosted for and at CWRU and are located within the SmartCART system. Using hosted catalogs allows a user to search across catalogs and vendors and compare items from all hosted catalogs.

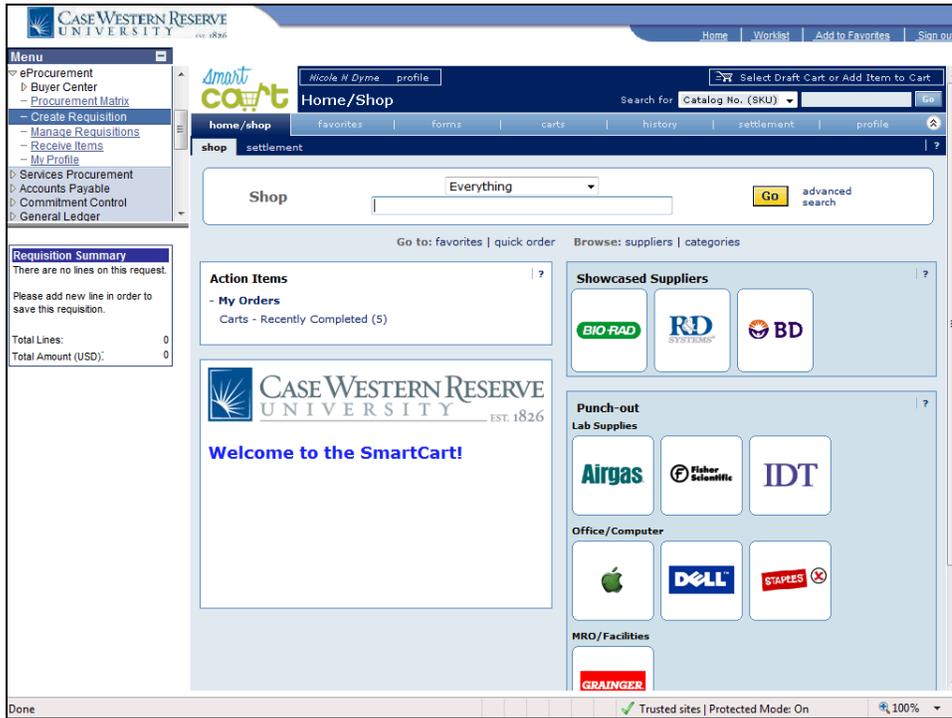
### Procedure

To begin an order from a Hosted Catalog, log into Financials to get started.

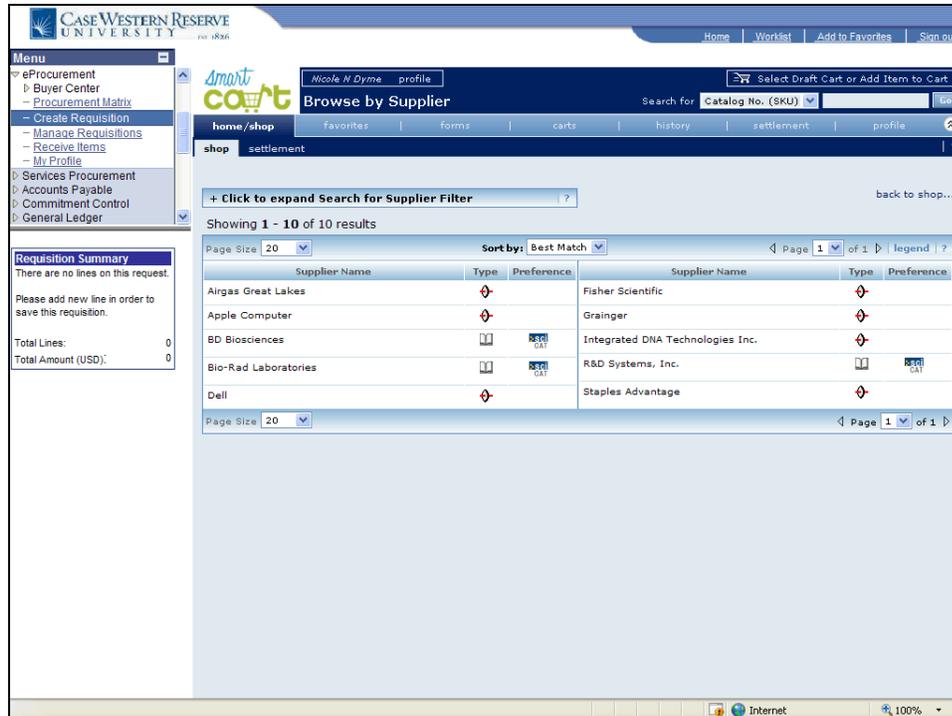


Step	Action
1.	Click the <b>eProcurement</b> link. 
2.	Click the <b>Create Requisition</b> link. You may also follow the navigation on the left Menu to Create Requisition. 
3.	The Create Requisition screen appears. Click the <b>2. Add Items and Services</b> link. 
4.	Click the <b>SmartCART</b> tab. 

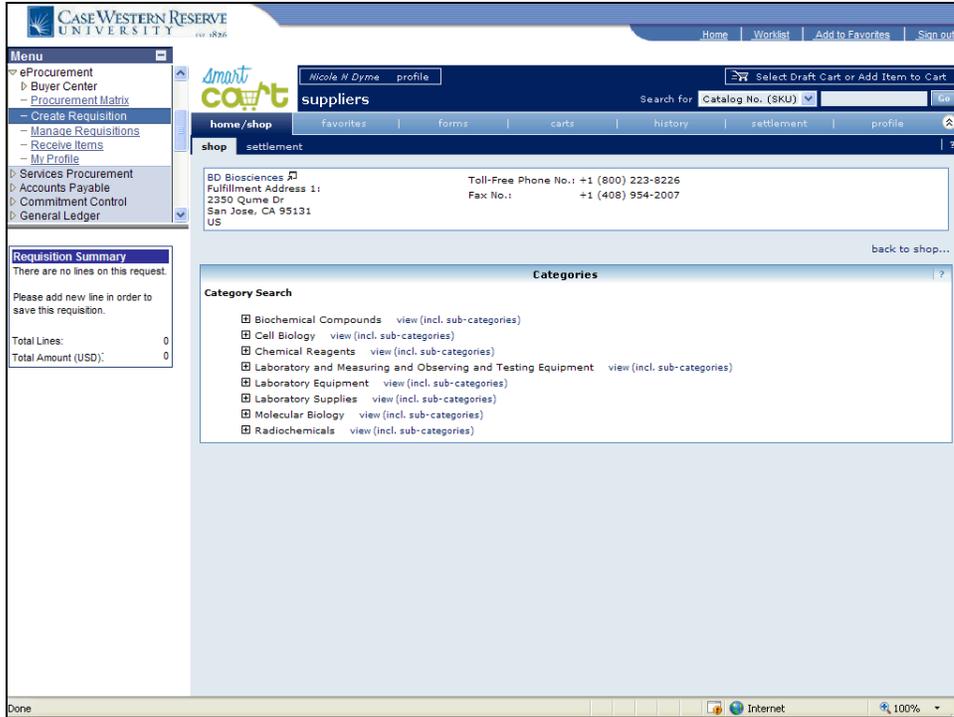
Step	Action
5.	Click the <b>SmartCART</b> link. <a href="#">SmartCART</a>



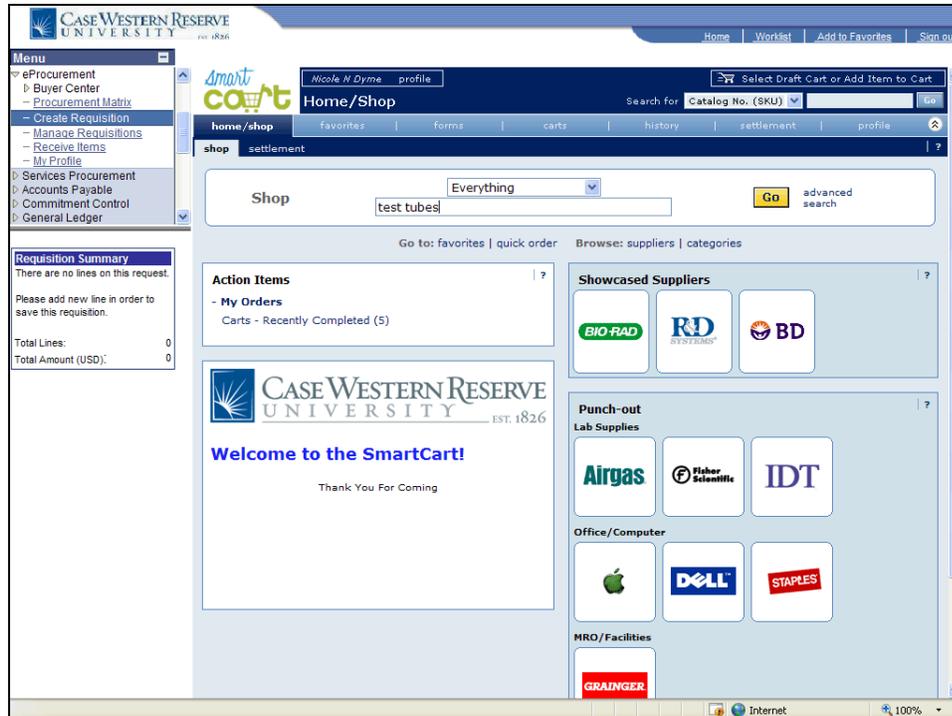
Step	Action
6.	The SmartCart screen appears. To see all hosted catalogs, click the Browse: <b>suppliers</b> link. <a href="#">Browse: suppliers</a>



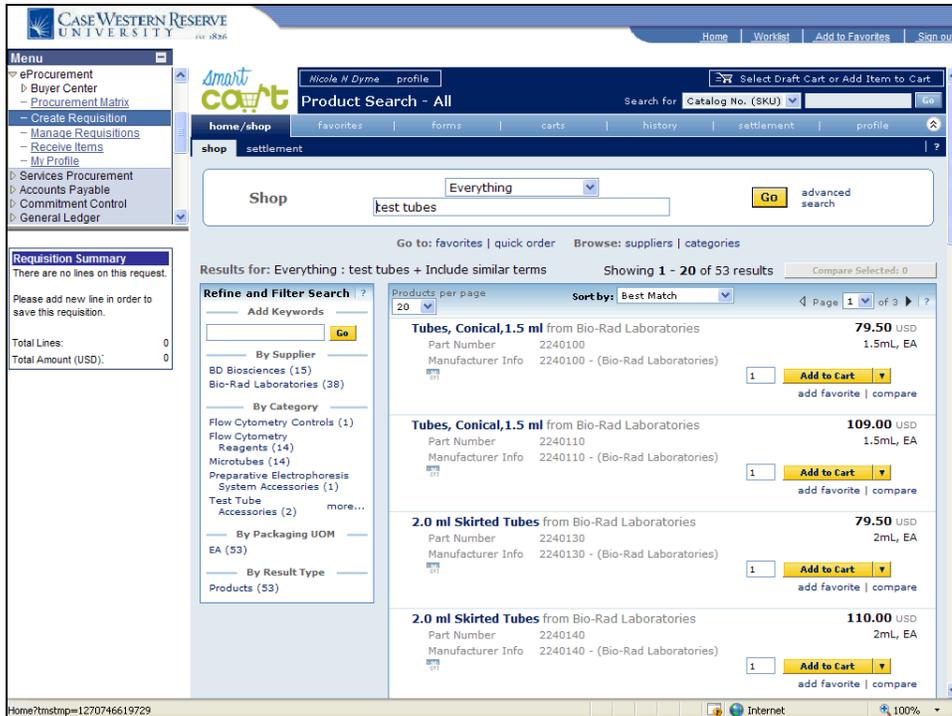
Step	Action
7.	<b>Hosted Catalog Suppliers</b> are indicated by the <b>open book icon</b> in the list of suppliers.
8.	Click a <b>Hosted Catalog Suppliers</b> icon. 



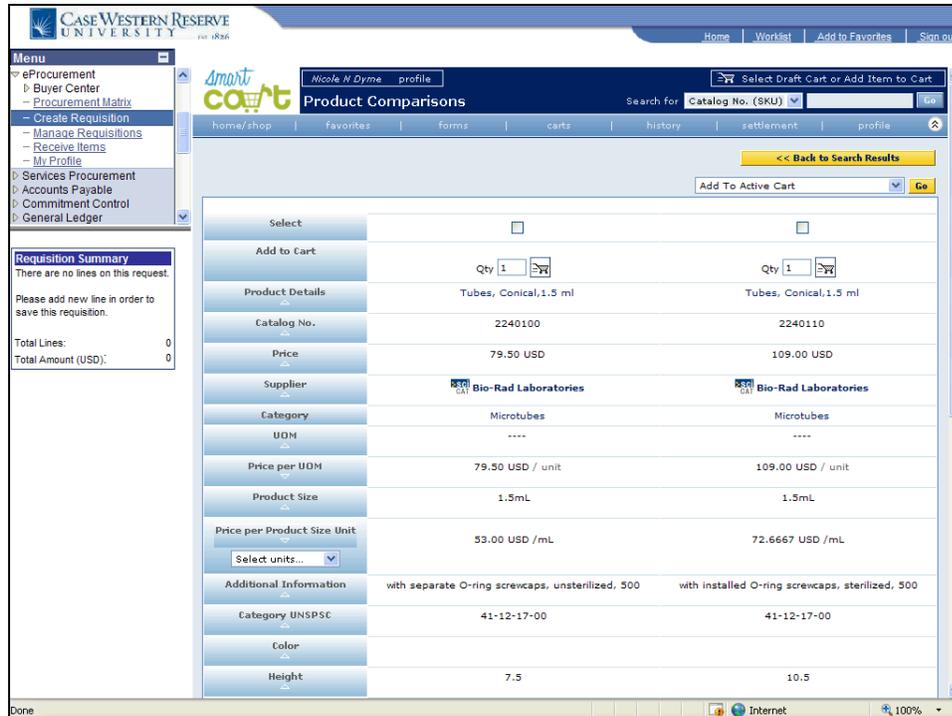
Step	Action
9.	The top area shows information about the supplier. The bottom area shows the categories this vendor provides and drill down for more information and details.
10.	To return to the home/shop page, click the <b>back to shop</b> link. 



Step	Action
11.	<p>To search all hosted catalogs, use the "<i>Shop at the Top</i>" search area. For this example, search everything and enter "<b>test tubes</b>" in the keyword search field.</p> <p>Note, see the "Using The SmartCART system" document to set up your search preferences.</p> 
12.	<p>Click the <b>Go</b> button.</p> 



Step	Action
13.	The <b>Refine and Filter Search</b> box on the left populates with filtered options from your search. For example by Supplier or By Category. It also lists the number of items in that category. <b>Refine and Filter Search</b>
14.	The <b>compare</b> link can be used only with hosted catalogs. Click <b>compare</b> on each item you would like to compare, a green check appears next to the word compare for those items that are to be compared. <b>compare</b>
15.	To change this preference, and not compare items, you can click the <b>remove</b> link. <b>remove</b> ✓
16.	When ready to compare, click the <b>Compare Selected: 2</b> button on the top right of the page. <b>Compare Selected: 2</b>



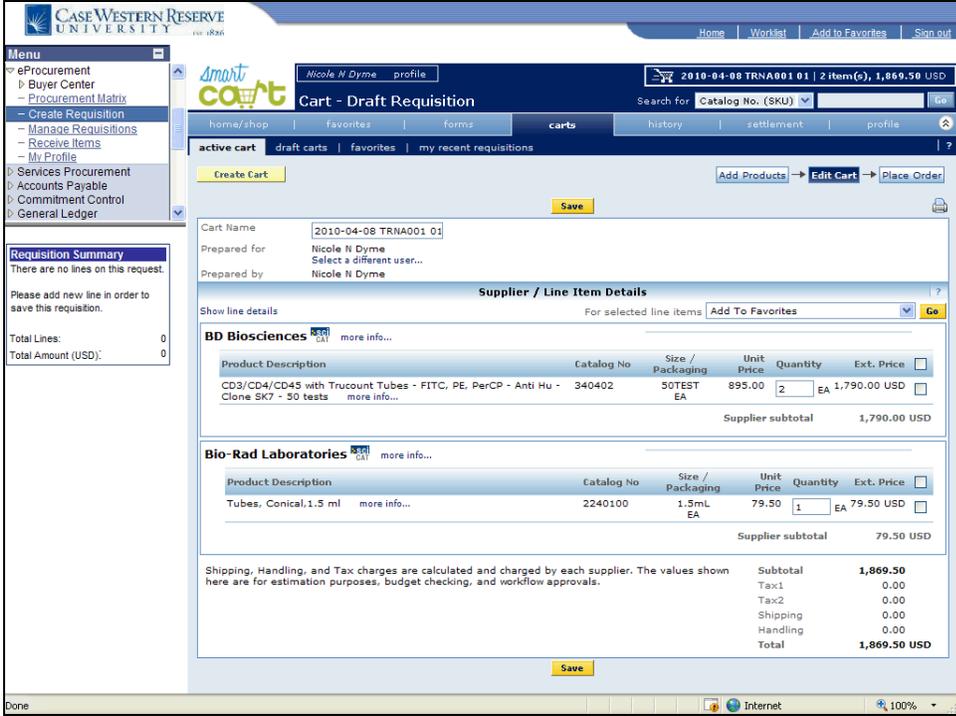
Step	Action
17.	The items will appear in a side by side comparison. To choose any item to purchase, enter the quantity, if more than 1, and Click the <b>Add to Cart</b> button, the cart icon. 
18.	Notice, on the top right of the home page, that your cart is now populated with that item. Click the cart icon link in the top right to go to your cart.
19.	To return to your original search click the <b>&lt;&lt; Back to Search Results</b> button. 

The screenshot shows the SmartCART interface with a search for 'test tubes'. The results list several products from Bio-Rad Laboratories, including 'Tubes, Conical, 1.5 ml' and '2.0 ml Skirted Tubes'. The 'Refine and Filter Search' sidebar on the left has the 'By Supplier' section expanded, and 'BD Biosciences (15)' is highlighted with a blue box, indicating it is the selected filter.

Step	Action
20.	Using the Filter Search, for our example, click the <b>BD Biosciences (15)</b> link. <b>BD Biosciences (15)</b>

The screenshot shows the SmartCART interface after filtering by 'BD Biosciences'. The search results are now limited to 15 items, all from BD Biosciences. The 'Refine and Filter Search' sidebar on the left shows 'Showing only results matching: BD Biosciences' and 'show all...' is visible. The product list includes items like 'CD4/CD8/CD3 with Trucount Tubes - FITC, PE, PerCP - Anti Hu - Clone SK7 - 50 tests' and 'CD3/CD4/CD45 with Trucount Tubes - FITC, PE, PerCP - Anti Hu - Clone SK7 - 50 tests'.

Step	Action
21.	The 15 items that were listed appear in a list. Choose an item by entering the amount, if more than 1.
22.	Click the <b>Add to Cart</b> button. 
23.	Notice that our cart, on the top left of the home page, has 2 items and increased in dollar amount.
24.	Click the <b>cart icon</b> link to return to your active cart. 

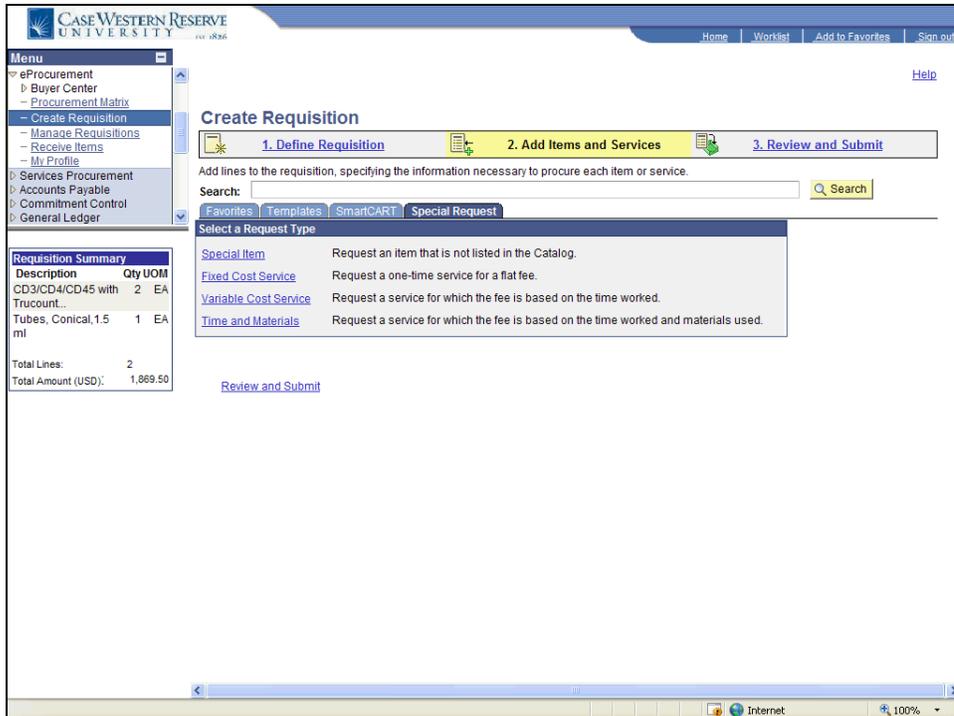


The screenshot displays the 'Draft Requisition' page in the SmartCART system. The cart contains two items:

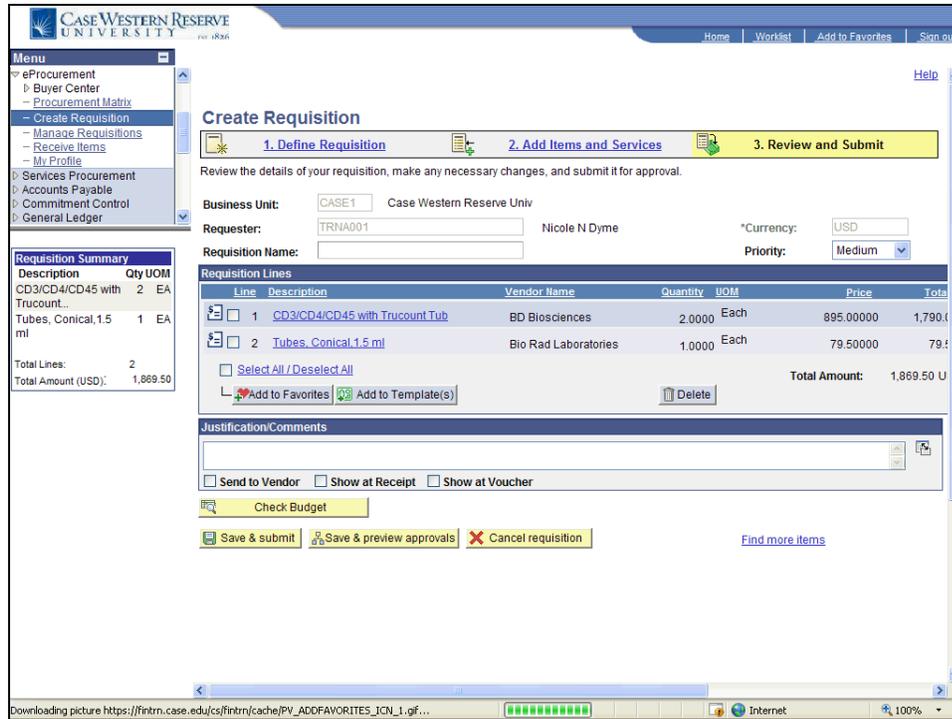
Supplier	Product Description	Catalog No.	Size / Packaging	Unit Price	Quantity	Ext. Price
BD Biosciences	CD3/CD4/CD45 with Trucount Tubes - FITC, PE, PerCP - Anti Hu - Clone SK7 - 50 tests	340402	50TEST EA	895.00	2	1,790.00 USD
Bio-Rad Laboratories	Tubes, Conical, 1.5 ml	2240100	1.5mL EA	79.50	1	79.50 USD

The total amount for the cart is 1,869.50 USD. The page also shows a 'Requisition Summary' on the left indicating 'There are no lines on this request.' and a 'Place Order' button at the bottom right.

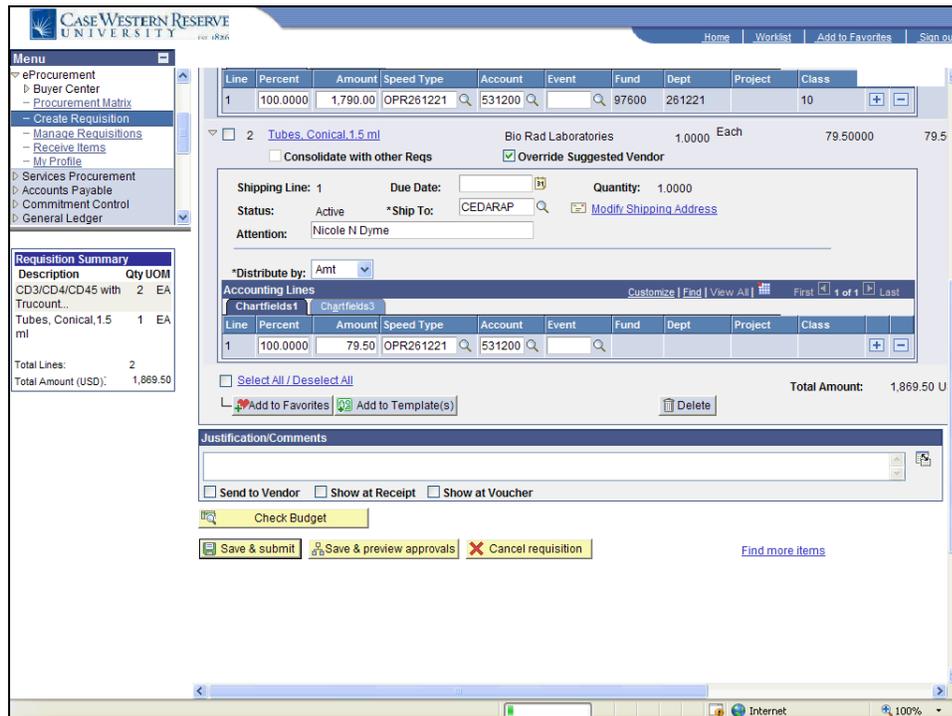
Step	Action
25.	The cart that has been created appears. Name the cart by clicking in the <b>Cart Name</b> field. In our example, enter " <b>Lab 2 Order</b> ".
26.	When ready to buy the items. Click the <b>Place Order</b> link.  There will be a moment when the information is integrating from SmartCART into Financials. 



Step	Action
27.	The Create Requisition page appears. Continue creating the requisition as usual to finalize the purchases. Click the <b>3. Review and Submit</b> link. <a href="#">3. Review and Submit</a>

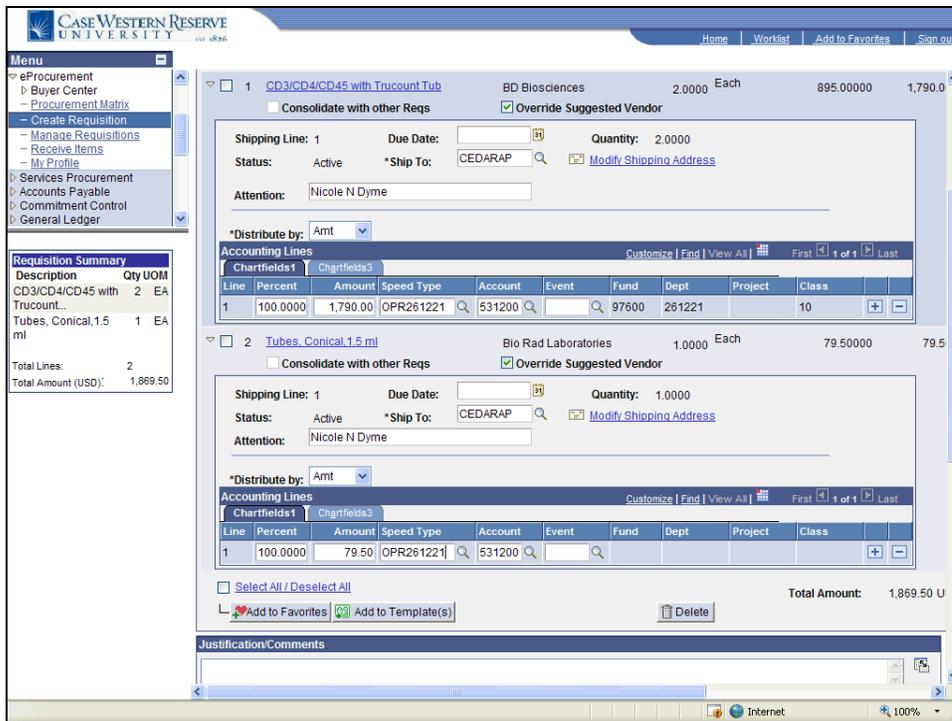


Step	Action
28.	Click the <b>paper dollar</b> icon to expand the item line. 



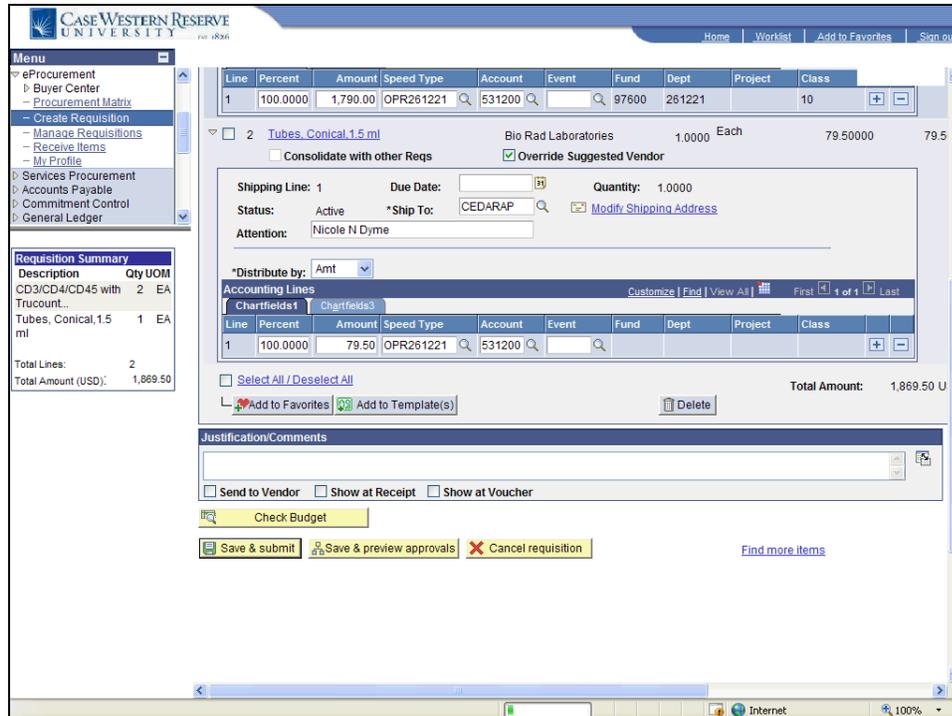
Step	Action
29.	Note that the <b>Requisition Summary</b> , on the left, is populated with the 2 items we ordered from the hosted catalogs.
30.	If the <b>Ship To:</b> will be to a location that is not the default (your Case ID) click the lookup icon to search locations.

 See the section *Ship To Locations* for details on using the new Ship To address.

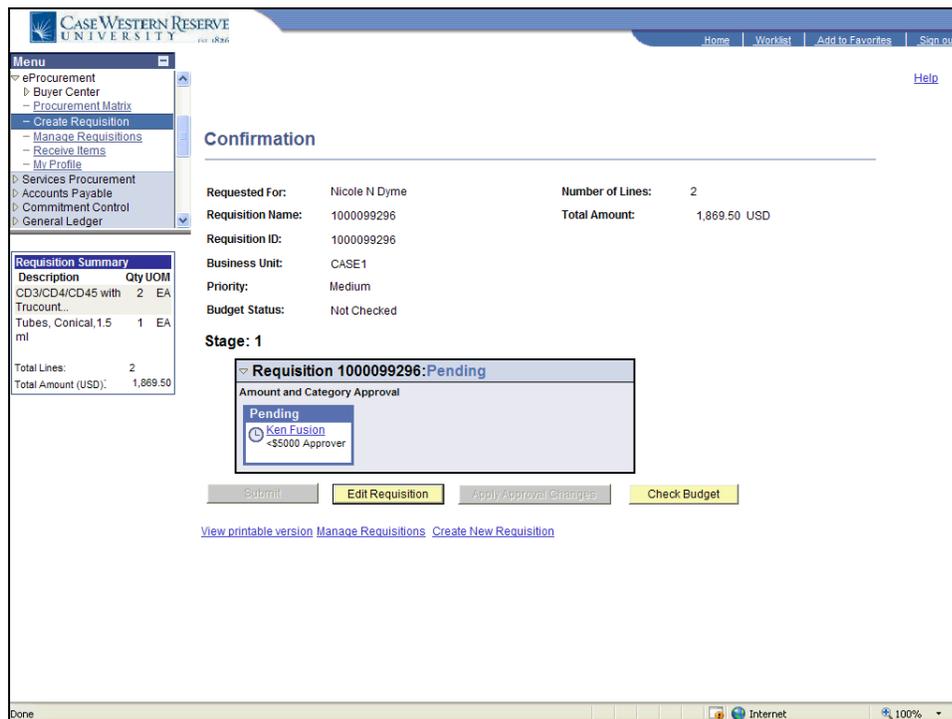


Step	Action
31.	Enter the SpeedType in the SpeedType field. 

 Each line item will need to have a SpeedType entered. The advantage of this being per line is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will receive their own Purchase Order from SmartCART.



Step	Action
32.	Click the <b>Save &amp; submit</b> button.



Step	Action
33.	<p>If you need approvals the Approvals page will appear. If you are a self approver the page will show approved. A Purchase Order will be dispatched. The process runs about every 20 minutes to dispatch SmartCART Purchase Orders. Once the approver has approved the purchase a Purchase Order will go out within 20 minutes.</p> <p>No buyer is involved in SmartCART purchases.</p>
34.	<p>This completes how to place an order in SmartCART from a Hosted Catalog. <b>End of Procedure.</b></p>

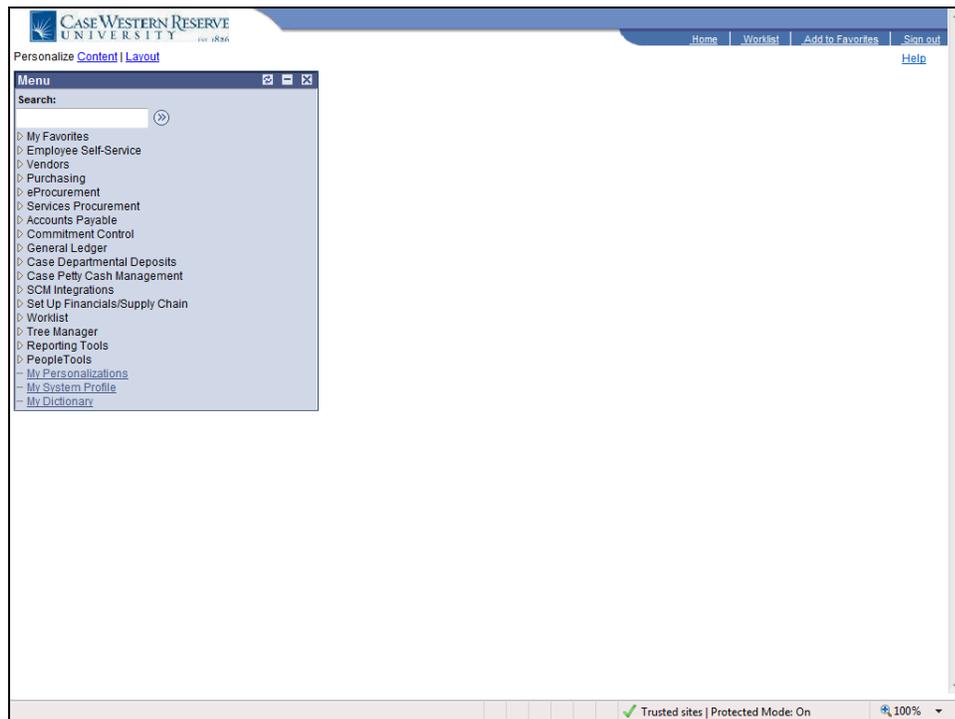
## Ordering from Dell in SmartCART

This section will explain how to order from Dell using SmartCART.

Ordering from Dell in SmartCART is very similar to the previous method. Using SmartCART, an equote is not needed, the system will connect to your SmartCART that will have the system configuration and information available, even after the purchase.

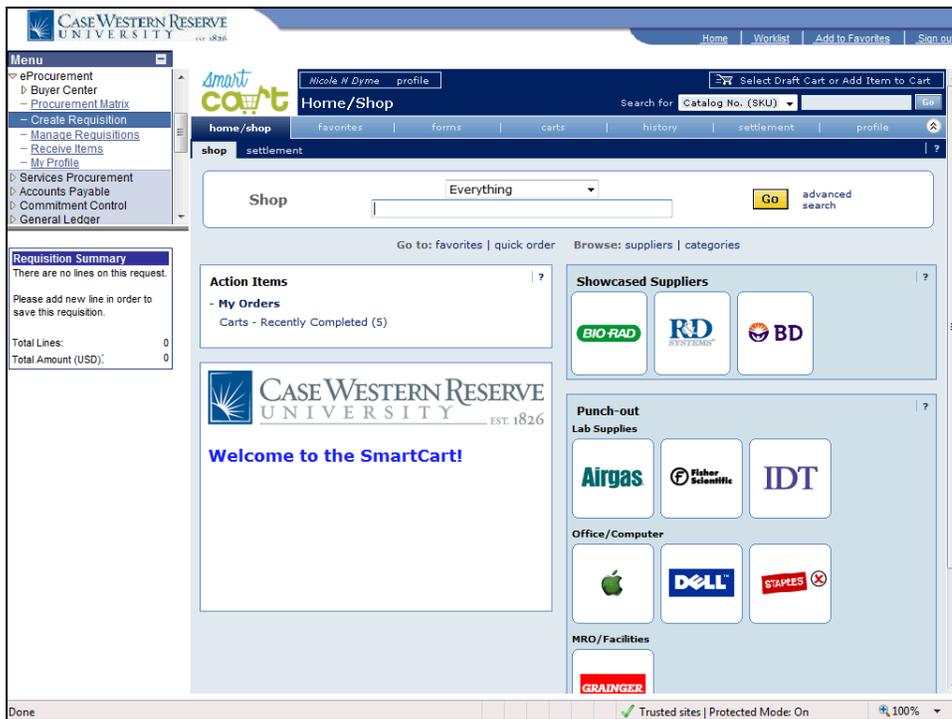
### Procedure

To begin, login to Financials and enter the SmartCART home page.



Step	Action
1.	Click the <b>eProcurement</b> link. <a href="#">eProcurement</a>
2.	Click the <b>Create Requisition</b> link. You may also follow the navigation on the left Menu to Create Requisition. <a href="#">Create Requisition</a>
3.	The Create Requisition screen appears. Click the <b>2. Add Items and Services</b> link. <a href="#">2. Add Items and Services</a>
4.	Click the <b>SmartCART</b> tab. <a href="#">SmartCART</a>

Step	Action
5.	Click the <b>SmartCART</b> link. 



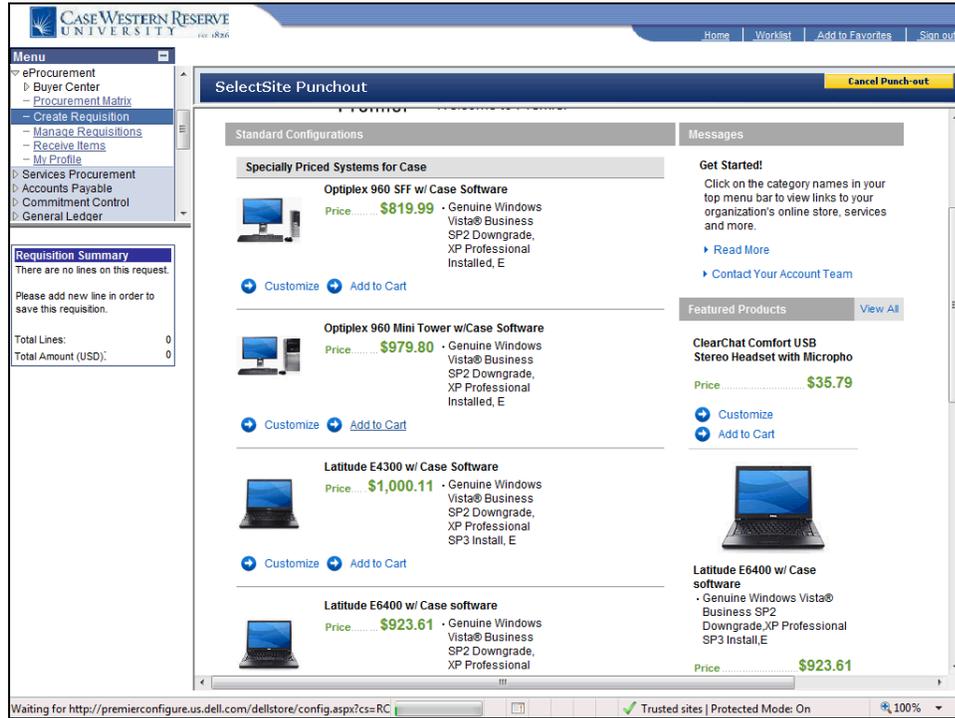
Step	Action
6.	The SmartCart Home page appears.  Click the <b>Dell logo box</b> . Dell is a Punchout supplier.

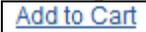
 The Showcased Suppliers section will have links to suppliers that Procurement wants to highlight such as new suppliers to the system or those that are having specials.

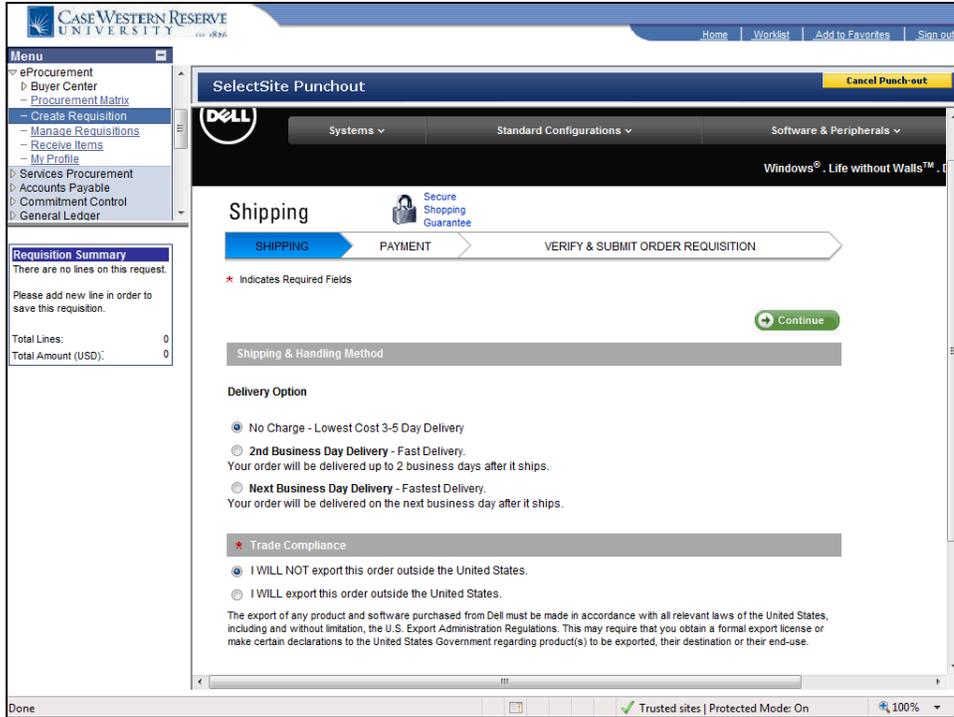
Punch Out suppliers are those that have catalogs you will order from directly.

Hosted catalogs are those that have catalogs that the University hosts that you can purchase from.

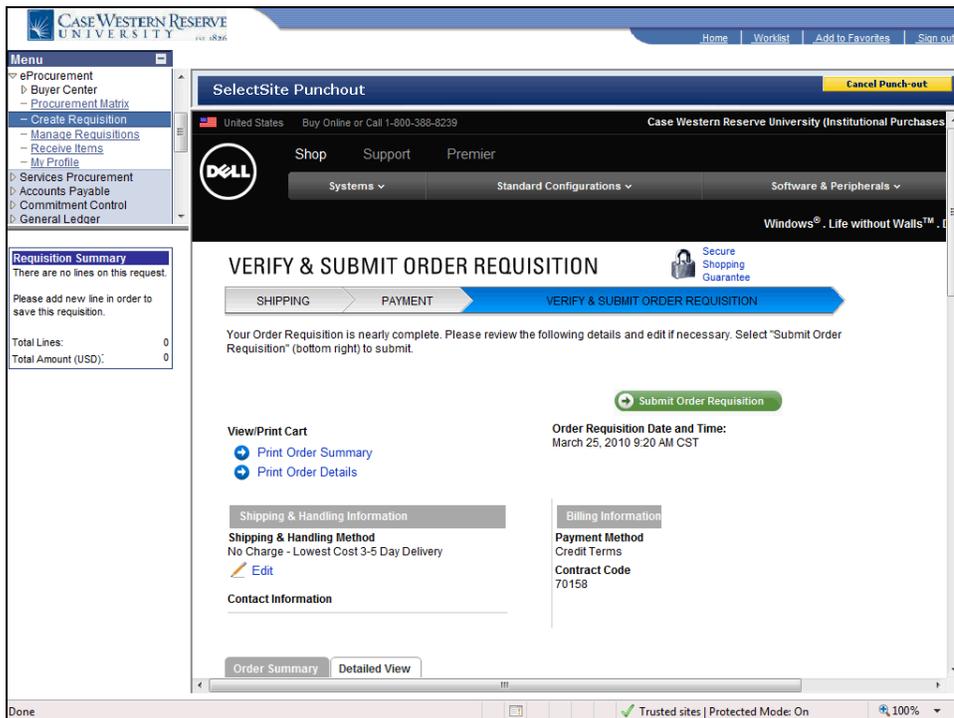
Step	Action
7.	Since Dell is a punch out catalog, the system will go directly to the Premier website.



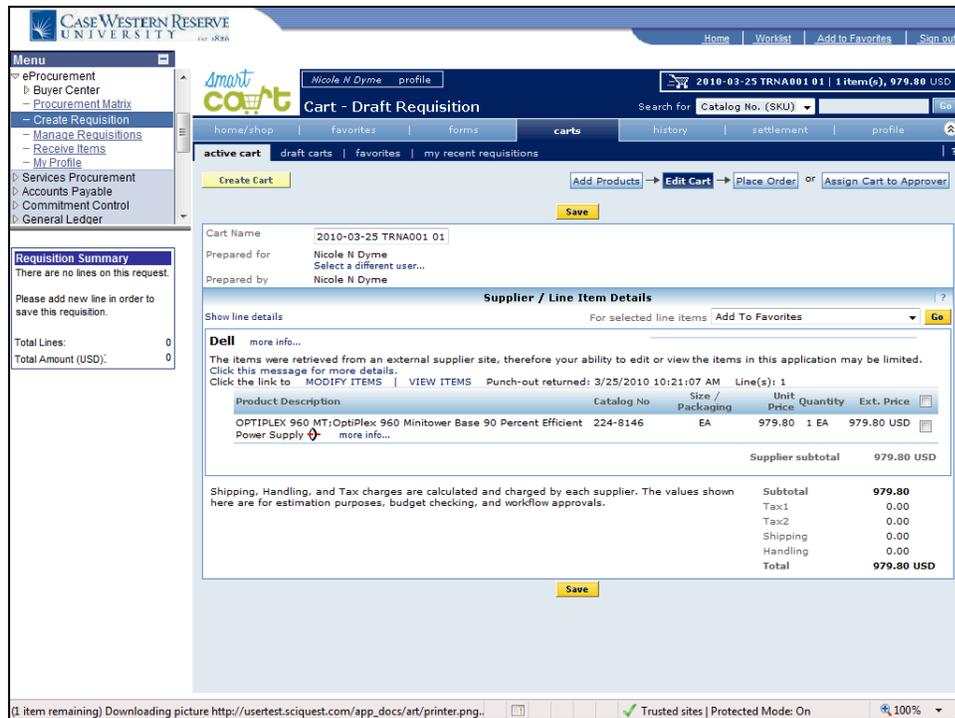
Step	Action
8.	<p>The Premier website appears. After you have selected and customized the item you want to purchase, click the <b>Add to Cart</b> button.</p> <p></p>
9.	<p>Choose the correct option for Trade Compliance. In our example, click the <b>I WILL NOT export this order outside the United States.</b> option.</p> <p></p>



Step	Action
10.	Click the <b>Continue</b> button. 



Step	Action
11.	<p>Once you have reviewed your order for accuracy, click the <b>Submit Order Requisition</b> button.</p> <p>Printing your Order Summary and Order Details is also available from this page.</p> 



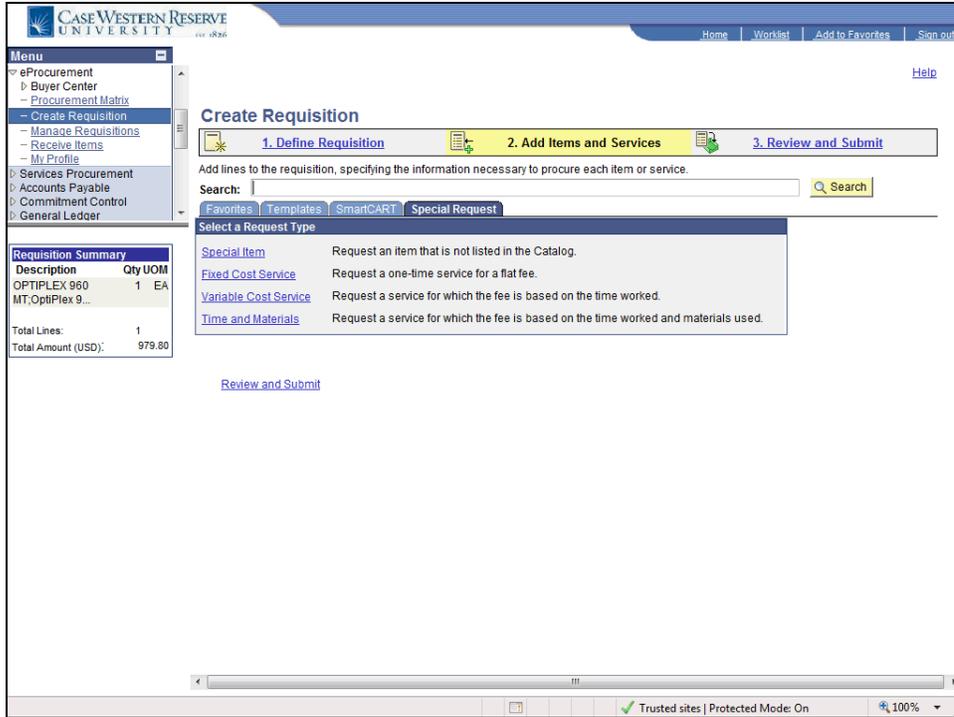
**Supplier / Line Item Details**

The items were retrieved from an external supplier site, therefore your ability to edit or view the items in this application may be limited. Click the link to [MODIFY ITEMS](#) | [VIEW ITEMS](#) Punch-out returned: 3/25/2010 10:21:07 AM Line(s): 1

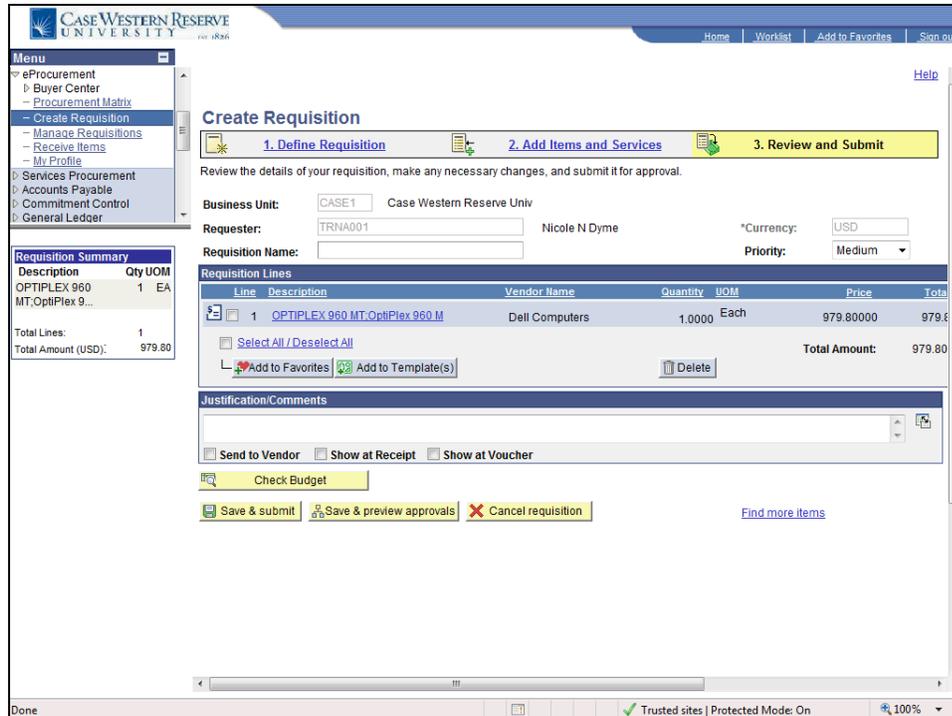
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
OPTIPLX 960 MT;OptiPlex 960 Minitower Base 90 Percent Efficient Power Supply	224-8146	EA	979.80	1 EA	979.80 USD
Supplier subtotal					979.80 USD

Subtotal	979.80
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>979.80 USD</b>

Step	Action
12.	<p>The system will return you to the Financials system and integrate your order into SmartCART.</p> <p>To add more items to your order from the same or different vendor, click the <b>Add Products</b> link. More information is available in the section "Ordering from multiple vendors" section.</p>
13.	<p>To finish shopping, click the <b>Place Order</b> button.</p>

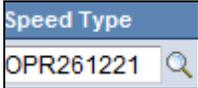


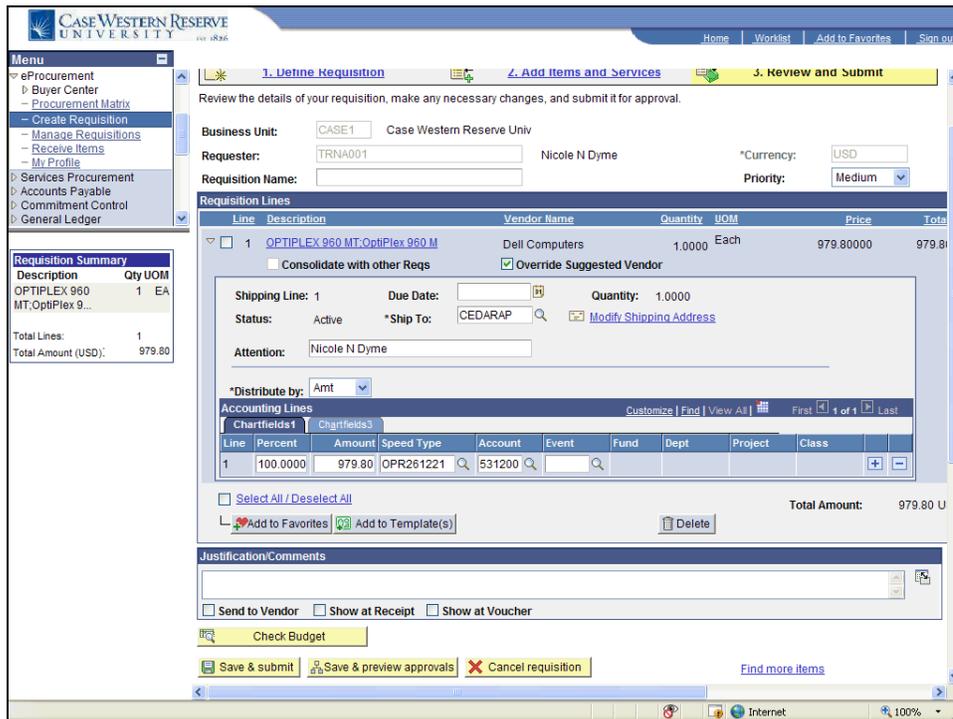
Step	Action
14.	Notice the purchase in the <b>Requisition Summary</b> .
15.	To submit the Requisition with your SmartCart order, Click the <b>3. Review and Submit</b> link.



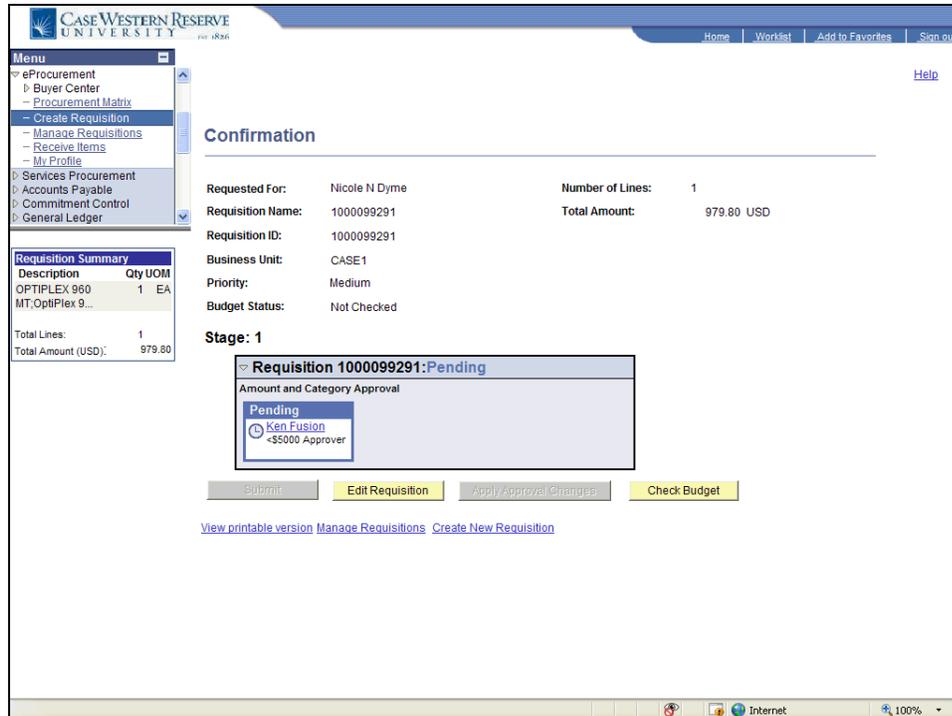
Step	Action
16.	<p>The Create Requisition screen appears.</p> <p>To complete your requisition, follow the same steps to create a requisition. Click the paper next to each line item to enter the due date, verify or change shipping, and enter the Speedtype and verify the account information.</p> 

 Each line item will need to have a SpeedType entered. The advantage of this being per line is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will receive their own Purchase Order from SmartCART.

Step	Action
17.	<p>Enter your <b>SpeedType</b> in the Speedtype field and verify the account number is correct.</p> <p>Justification/Comments will not be seen by a buyer, it is not necessary to enter information. However, if there is an approval, that person will see the comments.</p> 



Step	Action
18.	<p>Click the <b>Save &amp; Submit</b> button.</p> <p>You may Check Budget first if you prefer.</p>



Step	Action
19.	<p>The Confirmation screen appears. If there are approvals, those will appear in the Approvals box. If you are a self approver, the item will be approved and processed. You can view and monitor the requisition the same way you do for any Special Requests you order by clicking <a href="#">Manage Requisitions</a>.</p>
20.	<p><b>End of Procedure.</b></p>

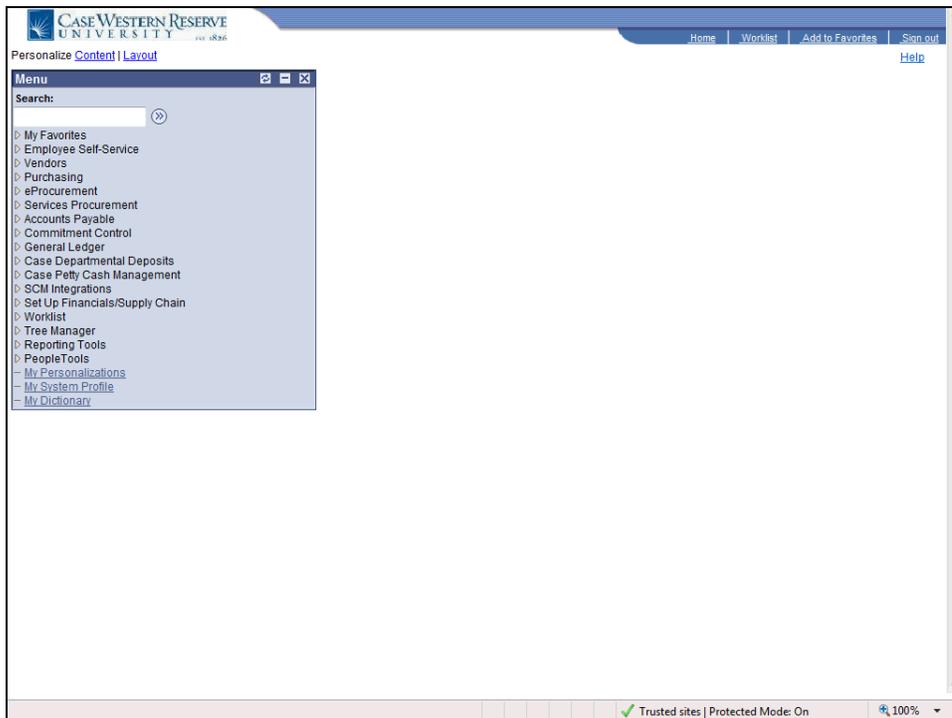
## Ordering from multiple vendors

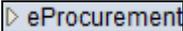
This section explains how, SmartCART allows orders from multiple vendors and suppliers on the same Requisition. Each supplier receives a Purchase Order.

In addition, each item is a line on the requisition. Therefore, each line item will need to have a SpeedType entered. The advantage of this is that you can order for multiple projects or speedtypes on the same requisition. Each vendor will receive their own Purchase Order from SmartCART.

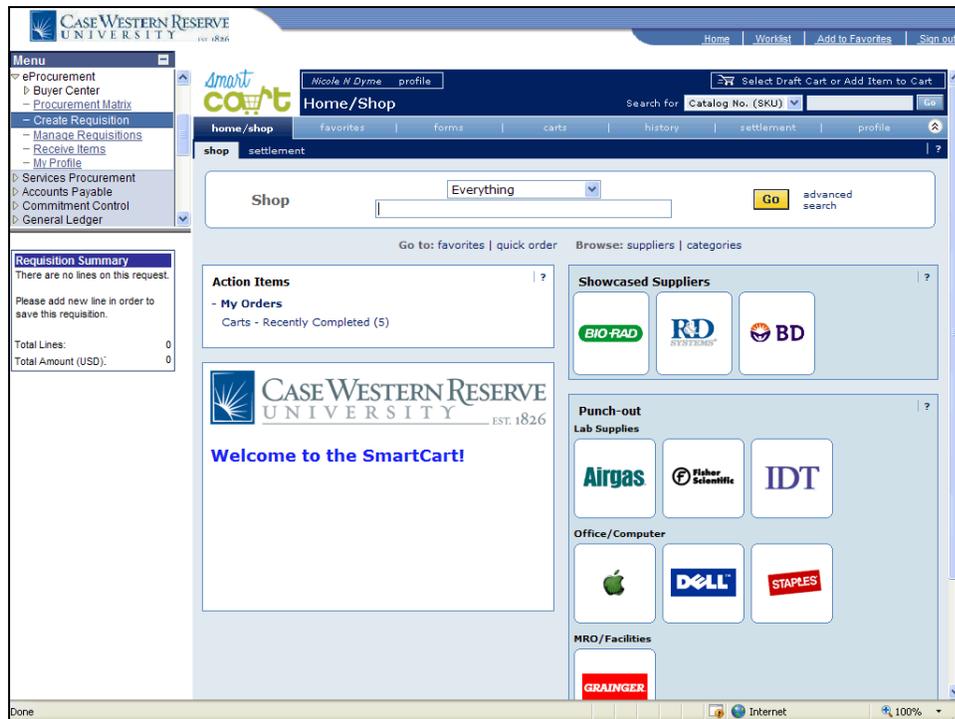
### Procedure

To begin, log in to Financials and proceed to the SmartCART Home page.



Step	Action
1.	Click the <b>eProcurement</b> link. 
2.	Click the <b>Create Requisition</b> link. You may also follow the navigation on the left Menu to Create Requisition. 
3.	The Create Requisition screen appears. Click the <b>2. Add Items and Services</b> link. 

Step	Action
4.	Click the <b>SmartCART</b> tab. 
5.	Click the <b>SmartCART</b> link. 



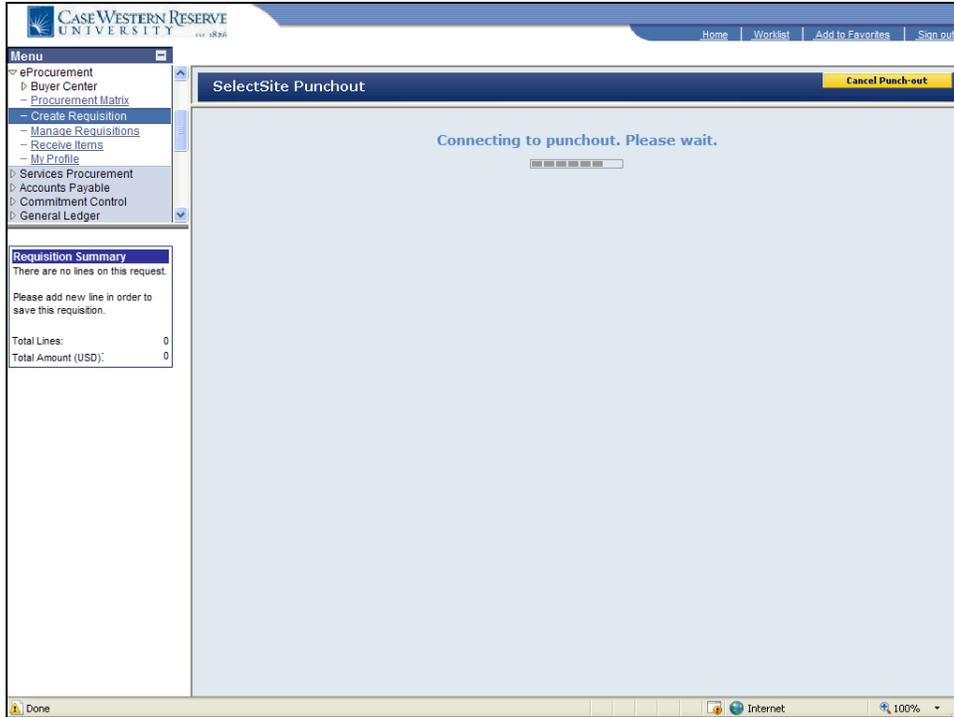
Step	Action
6.	The SmartCart Home page appears. For this example, click the <b>Staples Advantage</b> button. 



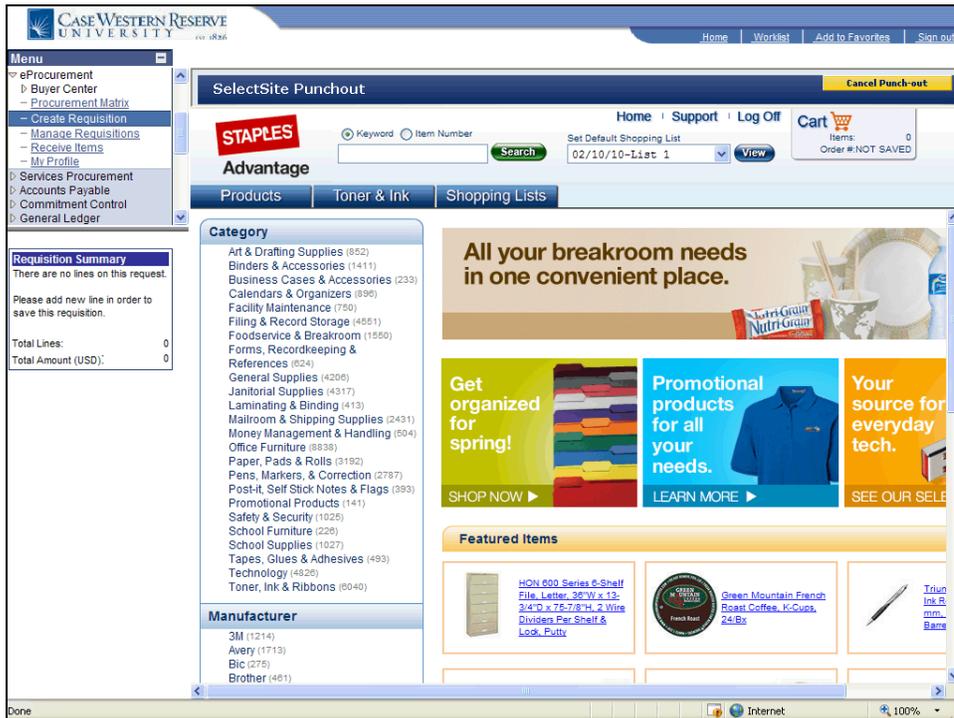
The Showcased Suppliers section will have links to suppliers that Procurement wants to highlight such as new suppliers to the system or those that are having specials.

Punch Out suppliers are those that have catalogs you will order from directly.

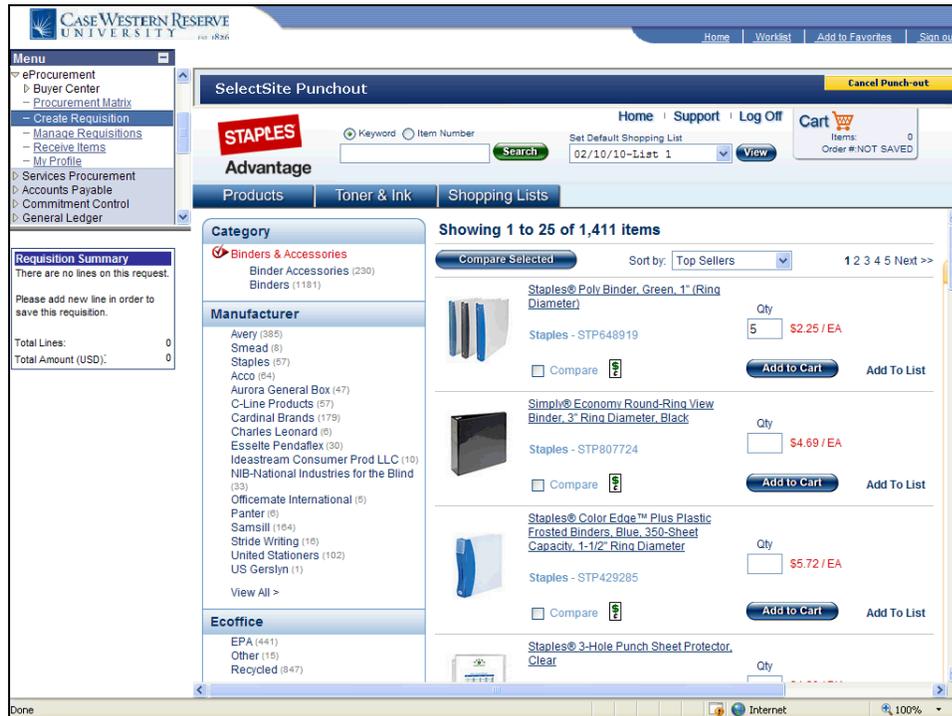
Hosted catalogs are those that have catalogs that the University hosts that you can purchase from.



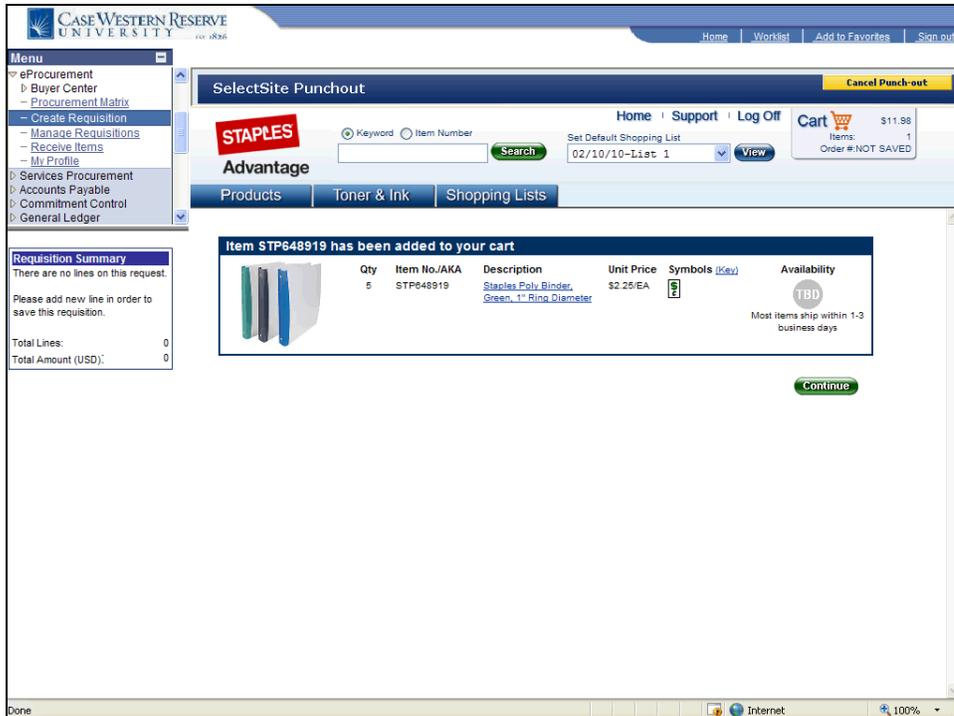
Step	Action
7.	Staples is a <b>Punchout</b> catalog, the system is going directly to the Staples away website.



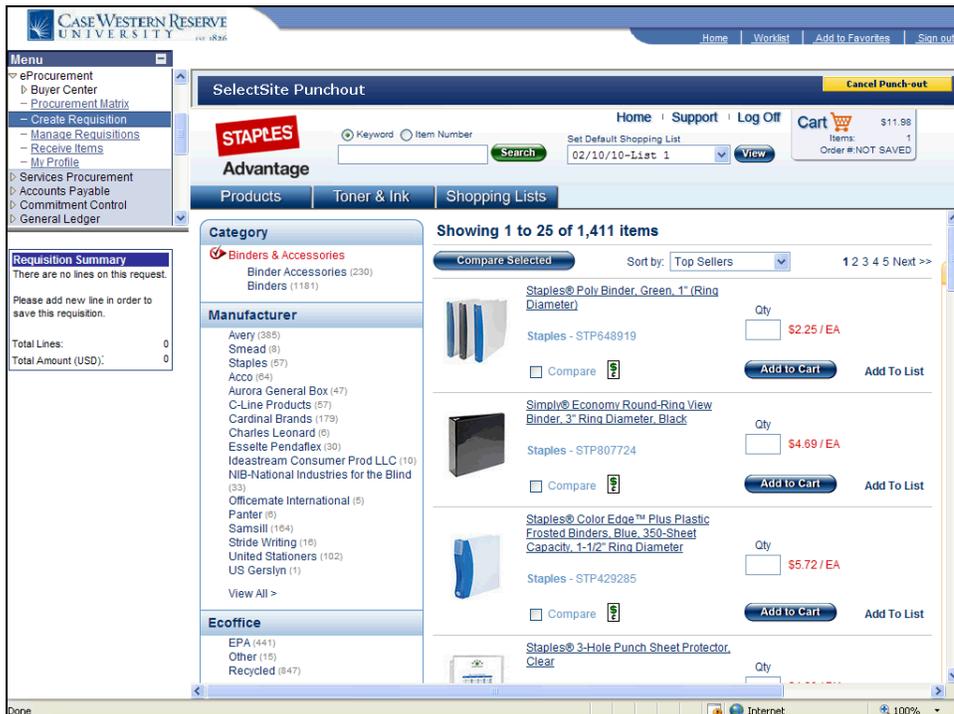
Step	Action
8.	The Staples website appears. Click the Products menu item to see a list of all Staples Categories. For this example, click the <b>Binders &amp; Accessories</b> link. <a href="#">Binders &amp; Accessories</a>



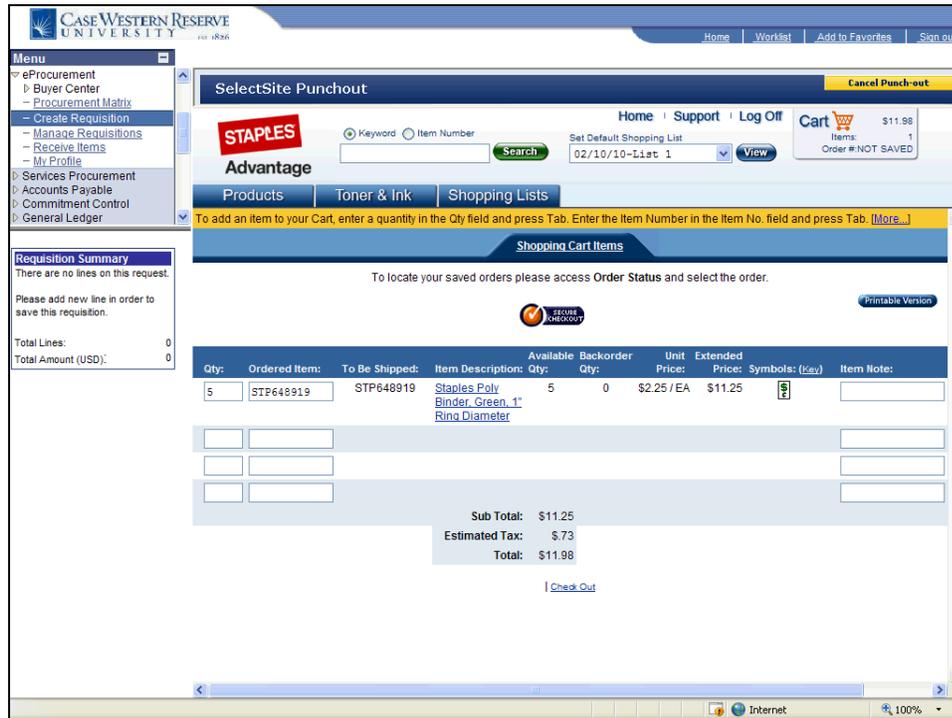
Step	Action
9.	Enter the quantity to purchase in the <b>Qty</b> field. For this example, enter "5". <input type="text" value="5"/>
10.	Click the <b>Add To Cart</b> button. <input type="button" value="Add To Cart"/>



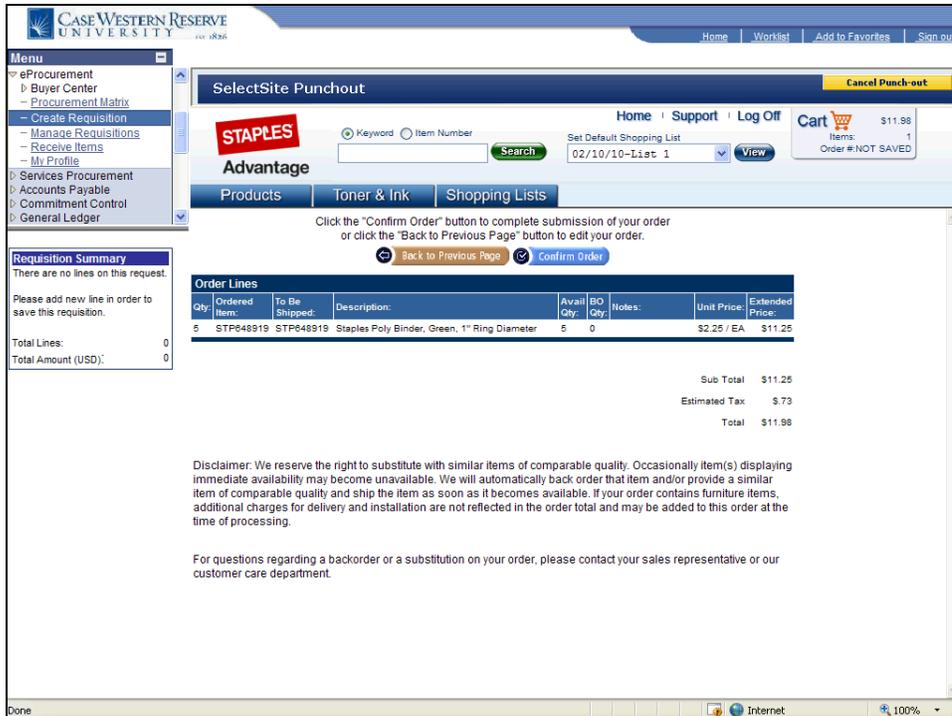
Step	Action
11.	The detailed item information appears. Click the <b>Continue</b> button. <div style="text-align: center; margin-top: 10px;">  </div>



Step	Action
12.	Continue to follow the same steps to order more items. When finished shopping, click the <b>Go to Cart</b> button. 



Step	Action
13.	The Staples shopping cart will appear with all the items purchased. If the cart is correct, click the <b>Secure CheckOut</b> button. 



**SelectSite Punchout** Cancel Punch-out

Home | Support | Log Off **Cart** \$11.98  
Items: 1  
Order # NOT SAVED

STAPLES Advantage

Products | Toner & Ink | Shopping Lists

Click the "Confirm Order" button to complete submission of your order or click the "Back to Previous Page" button to edit your order.

[Back to Previous Page](#) [Confirm Order](#)

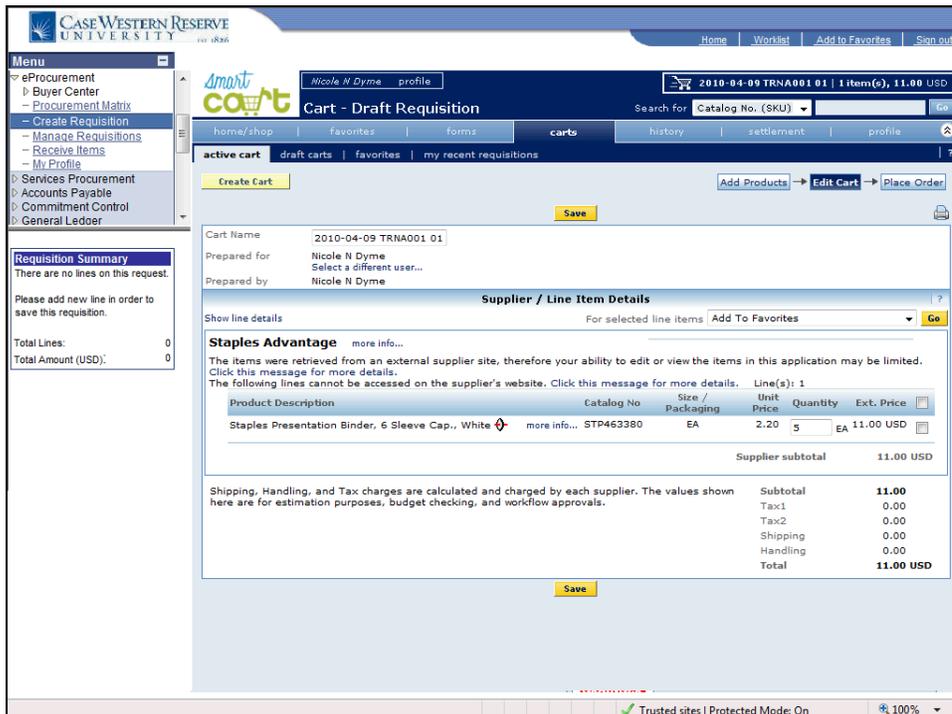
Qty:	Ordered Item:	To Be Shipped:	Description:	Avail Qty:	EO Qty:	Notes:	Unit Price:	Extended Price:
5	STP648919	STP648919	Staples Poly Binder, Green, 1" Ring Diameter	5	0		\$2.25 / EA	\$11.25

Sub Total \$11.25  
Estimated Tax \$0.73  
Total \$11.98

Disclaimer: We reserve the right to substitute with similar items of comparable quality. Occasionally item(s) displaying immediate availability may become unavailable. We will automatically back order that item and/or provide a similar item of comparable quality and ship the item as soon as it becomes available. If your order contains furniture items, additional charges for delivery and installation are not reflected in the order total and may be added to this order at the time of processing.

For questions regarding a backorder or a substitution on your order, please contact your sales representative or our customer care department.

Step	Action
14.	Review the Order. Click the <b>confirm order</b> button. 



Case Western Reserve University | Home | Worklist | Add to Favorites | Sign out

Menu: eProcurement, Buyer Center, Procurement Matrix, Create Requisition, Manage Requisitions, Receive Items, My Profile, Services Procurement, Accounts Payable, Commitment Control, General Ledger

Requisition Summary: There are no lines on this request. Total Lines: 0, Total Amount (USD): 0

SmartCART | 2010-04-09 TRNA001 01 | 1 item(s), 11.00 USD

Cart - Draft Requisition

Supplier / Line Item Details

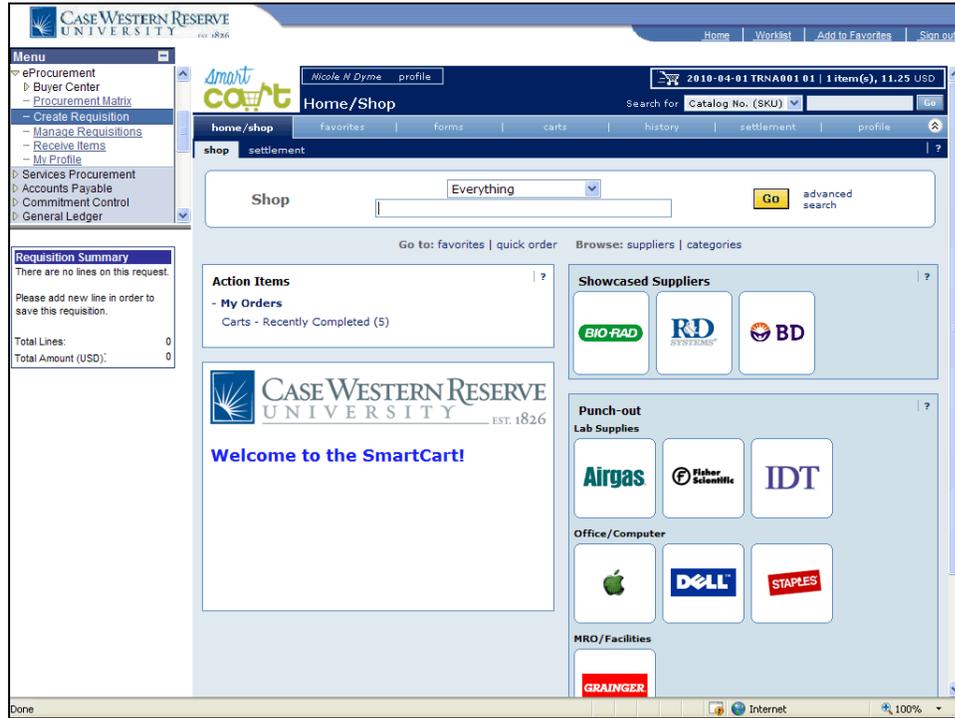
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Staples Presentation Binder, 6 Sleeve Cap., White	STP463380	EA	2.20	5	11.00 USD

Supplier subtotal 11.00 USD

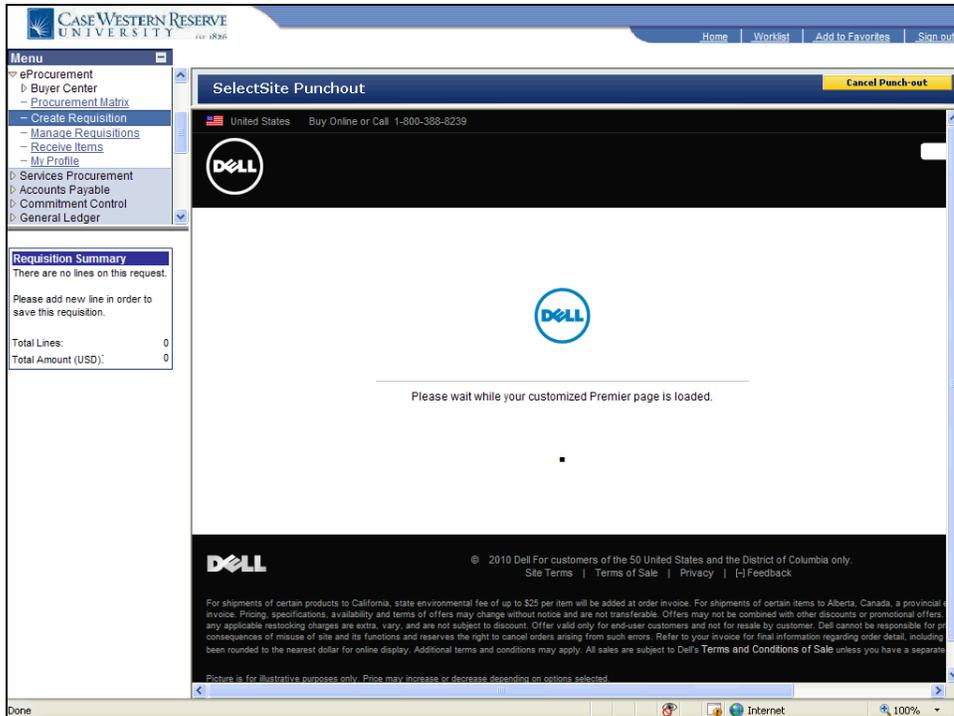
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	11.00
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>11.00 USD</b>

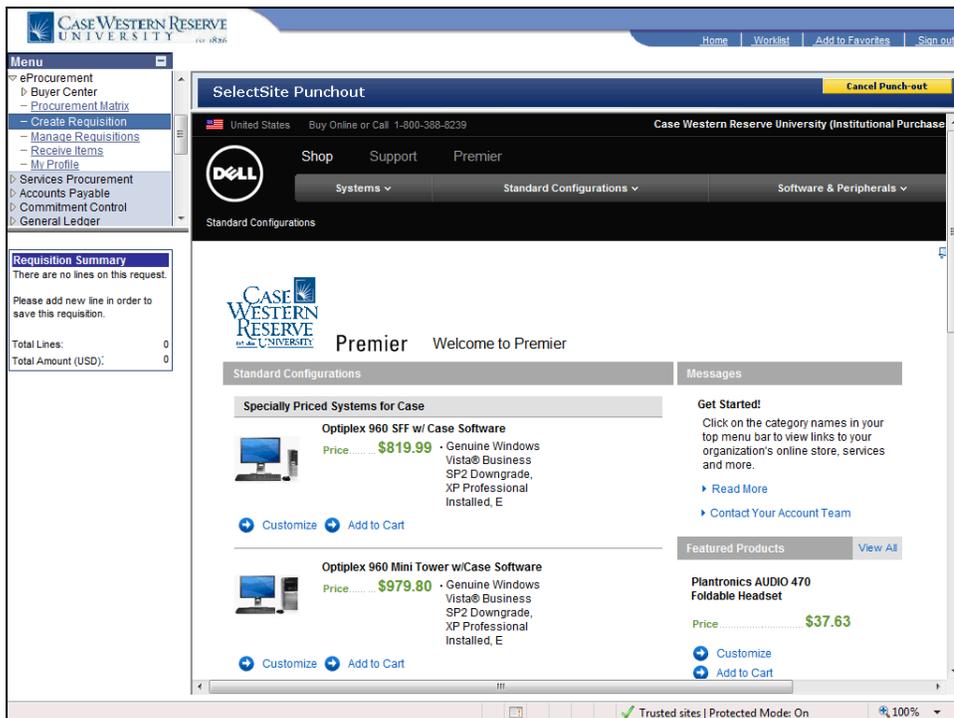
Step	Action
15.	To add more items from a different vendor to the SmartCART cart, click the <b>Add Products</b> link.



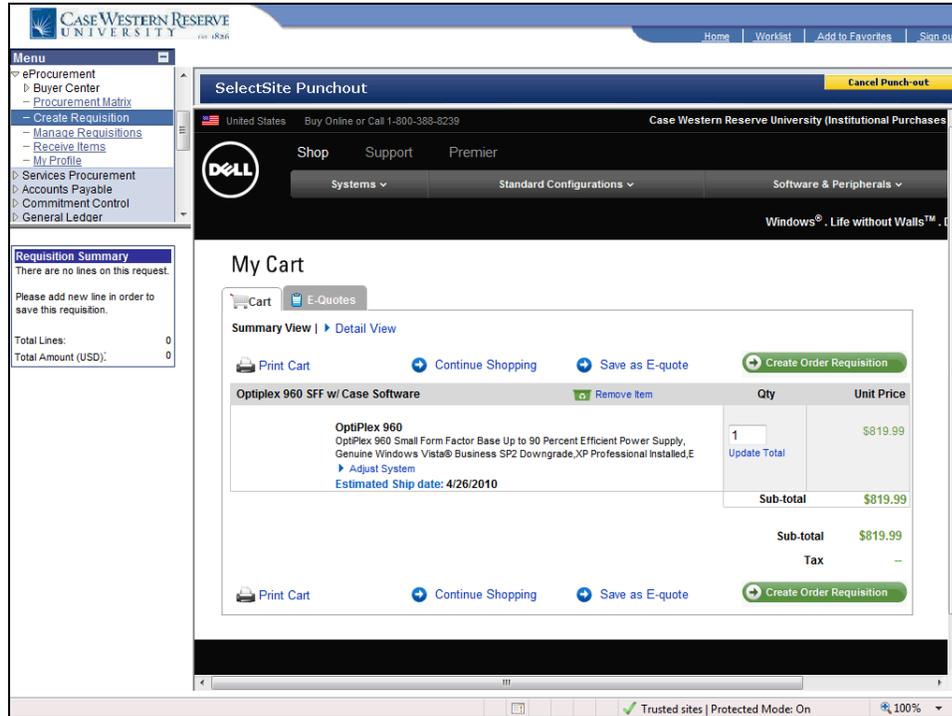
Step	Action
16.	For this example, we will order a computer. Click the <b>Dell</b> button.  The <b>Punchout</b> will go to the Dell Premier website. 



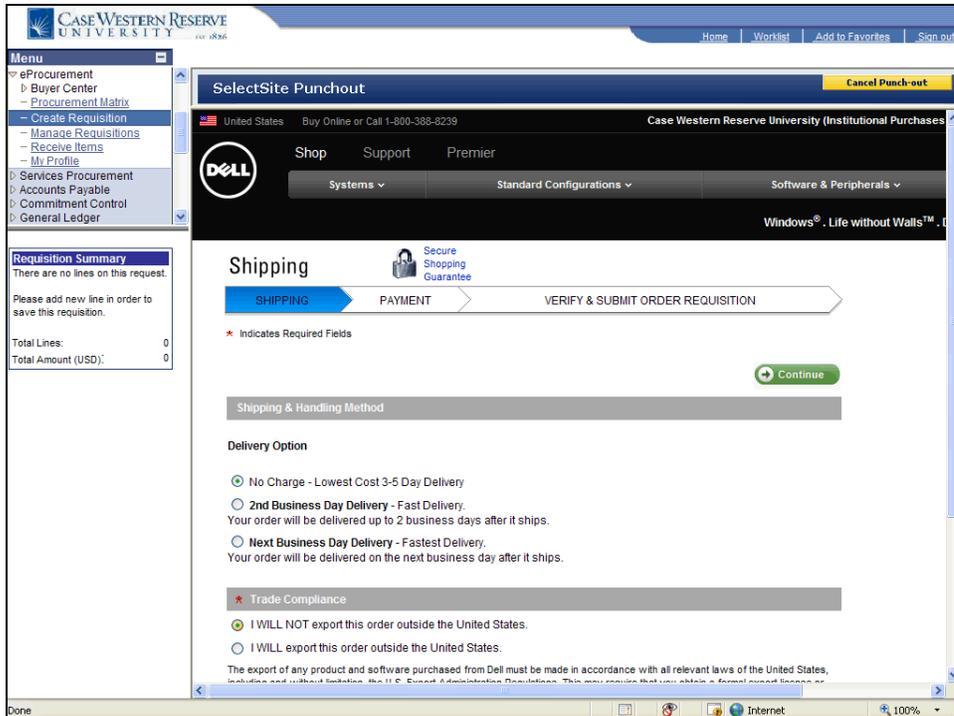
Step	Action
17.	The Premier website will appear and will be loading.



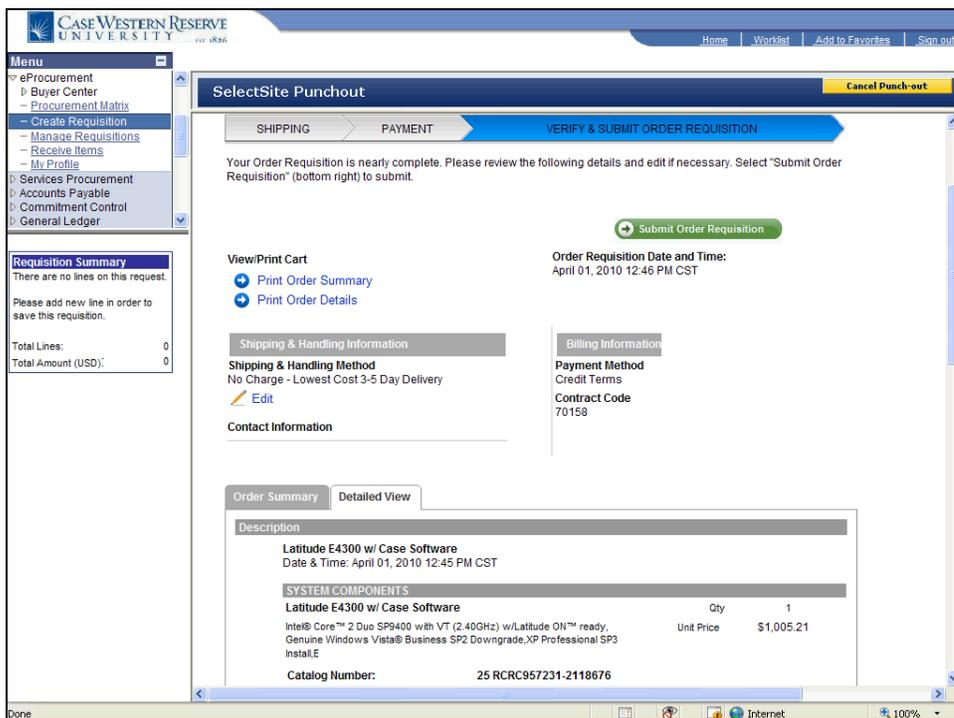
Step	Action
18.	Choose and/or customize the item to purchase and click the <b>Add to Cart</b> link. 



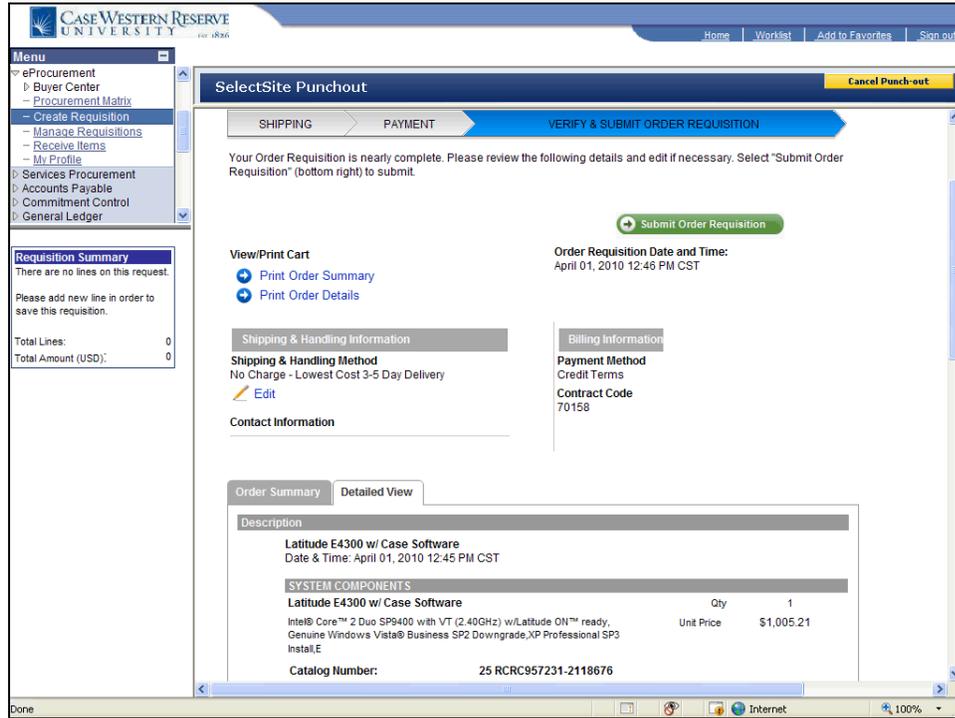
Step	Action
19.	Click the <b>Create Order Requisition</b> button. 
20.	Choose the correct option for Trade Compliance. In our example, click the <b>I WILL NOT export this order outside the United States.</b> option. 



Step	Action
21.	Click the <b>Continue</b> button. 

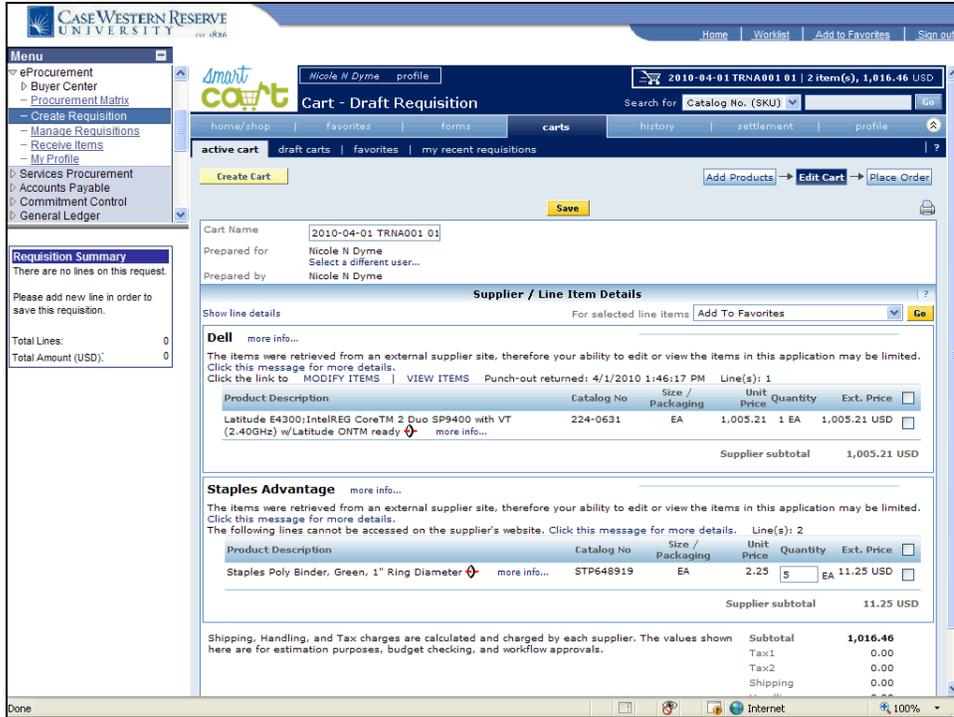


Step	Action
22.	Review the order. Printing the Order Summary and Order Details are also available from this page.

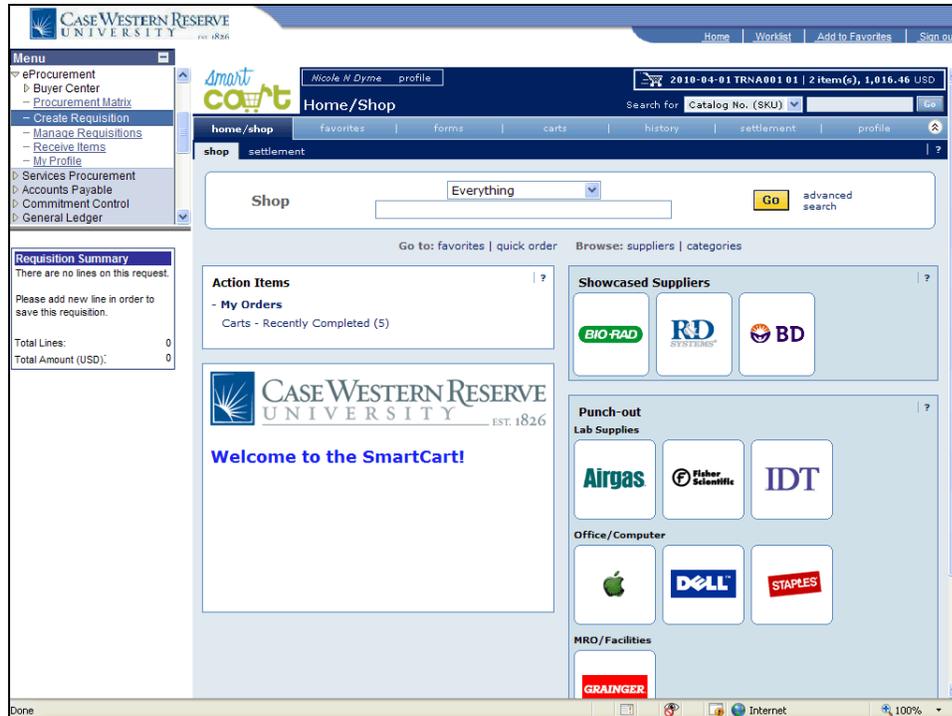


Step	Action
23.	Click the <b>Submit Order Requisition</b> button.

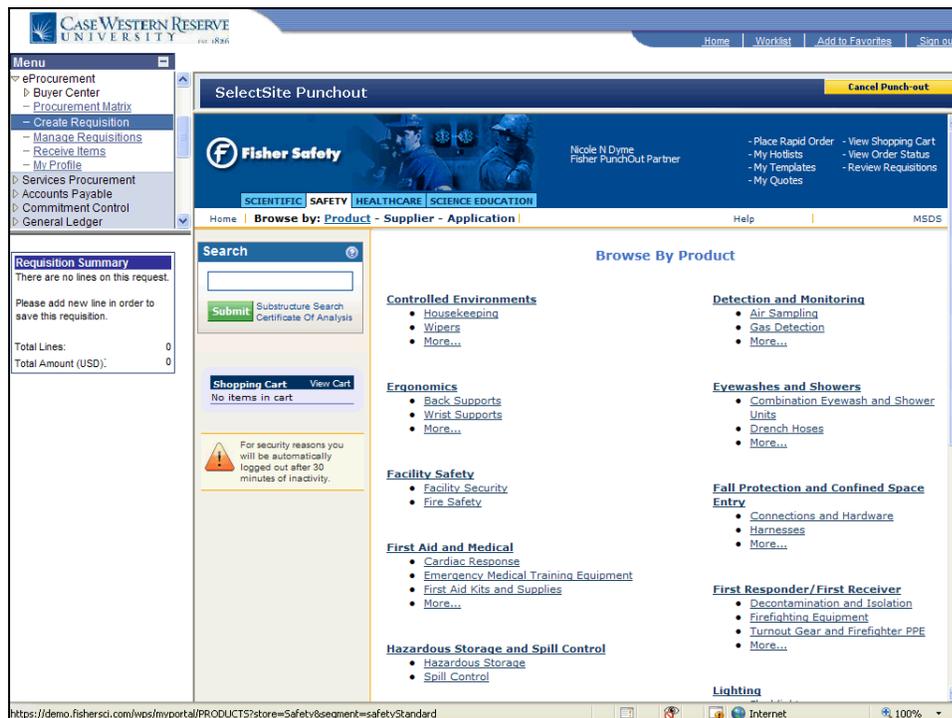




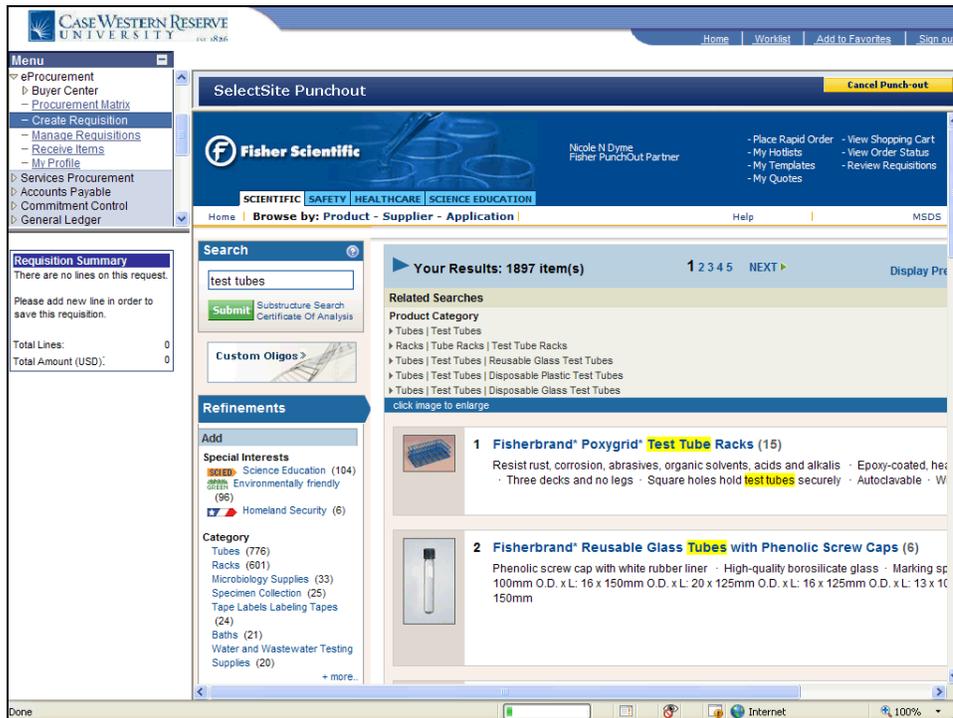
Step	Action
24.	<p>The order is placed in the SmartCART. Notice both vendors in the same cart. For this example, we are going to purchase another item. Click the <b>Add Products</b> link.</p> <p><b>Add Products</b></p>



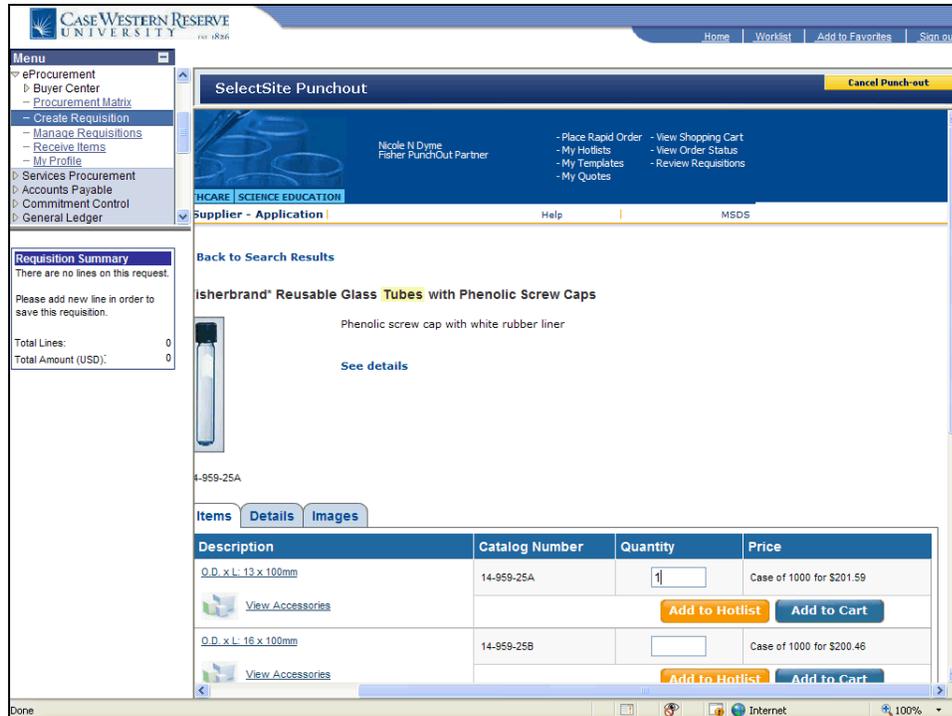
Step	Action
25.	For this example, click the <b>Fisher Scientific</b> button.



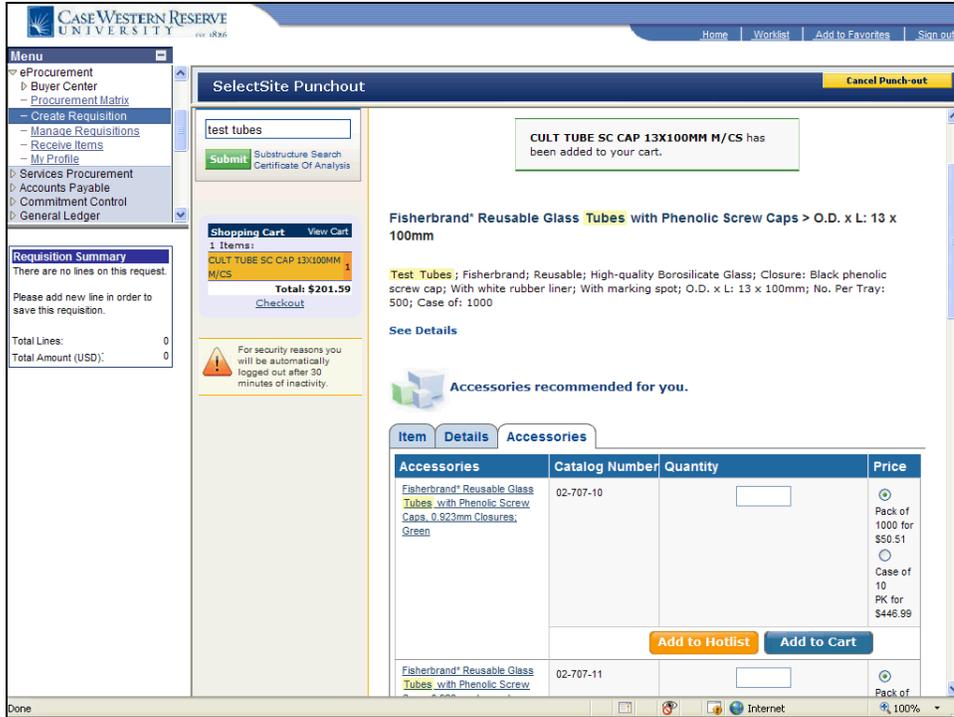
Step	Action
26.	The Fisher Scientific website appears.
27.	For this example, we are going to use the Search. Enter " <b>test tubes</b> " in the Search box and click the <b>Submit</b> button.



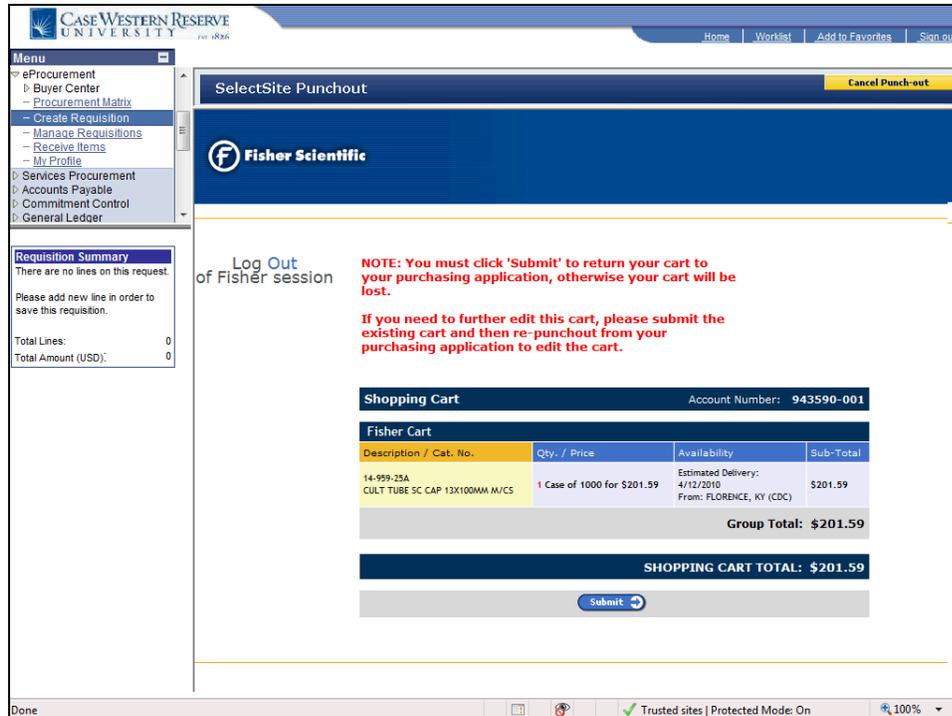
Step	Action
28.	The list of anything with test tube in the name appears.
29.	Choose an item and click the name, in this example, click the <b>Fisherbrand* Reusable Glass Tubes with Phenolic Screw Caps</b> link.



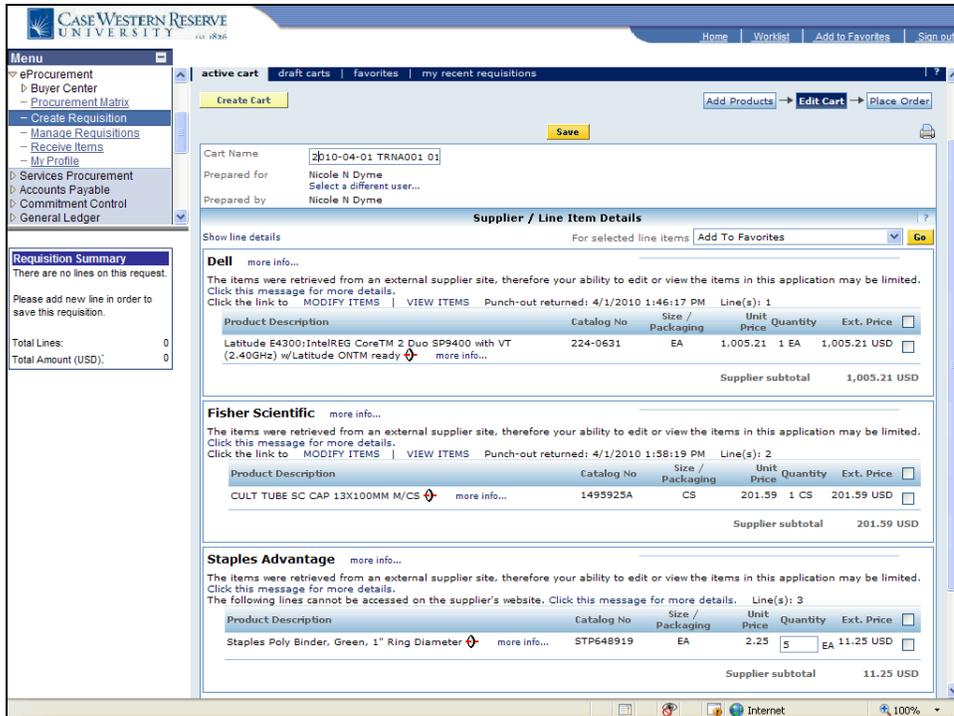
Step	Action
30.	Enter the quantity in the Quantity field. For this example enter "1". 
31.	Click the <b>Add to Cart</b> button. 



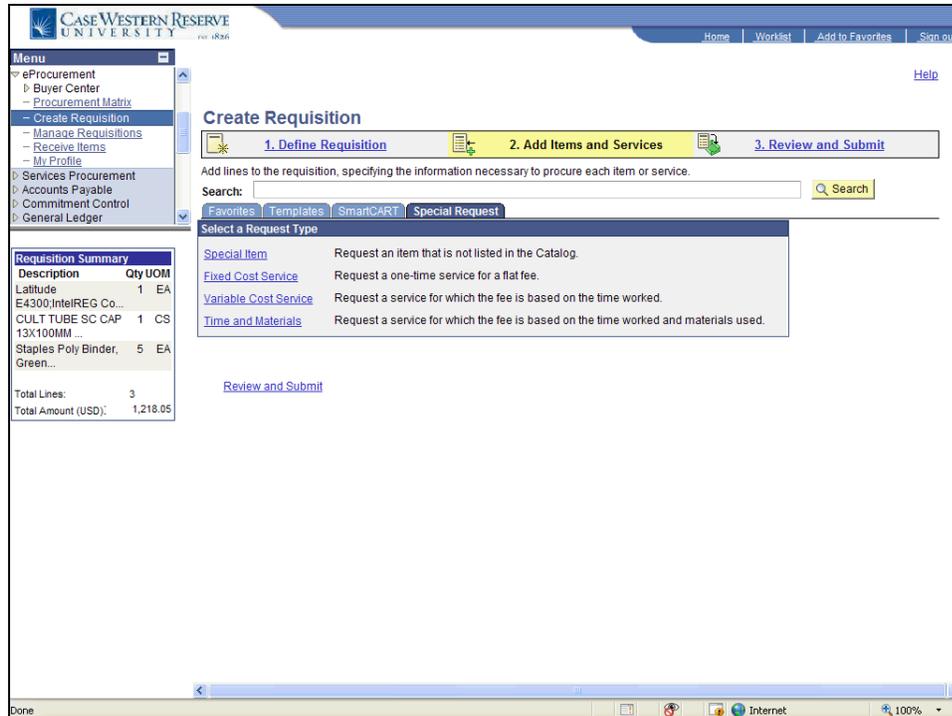
Step	Action
32.	<p>Note the item purchased appears in the Fisher Scientific Shopping Cart. The purchase is finished for this example.</p> <p>Click the <b>Checkout</b> link.</p> <p><a href="#">Checkout</a></p>



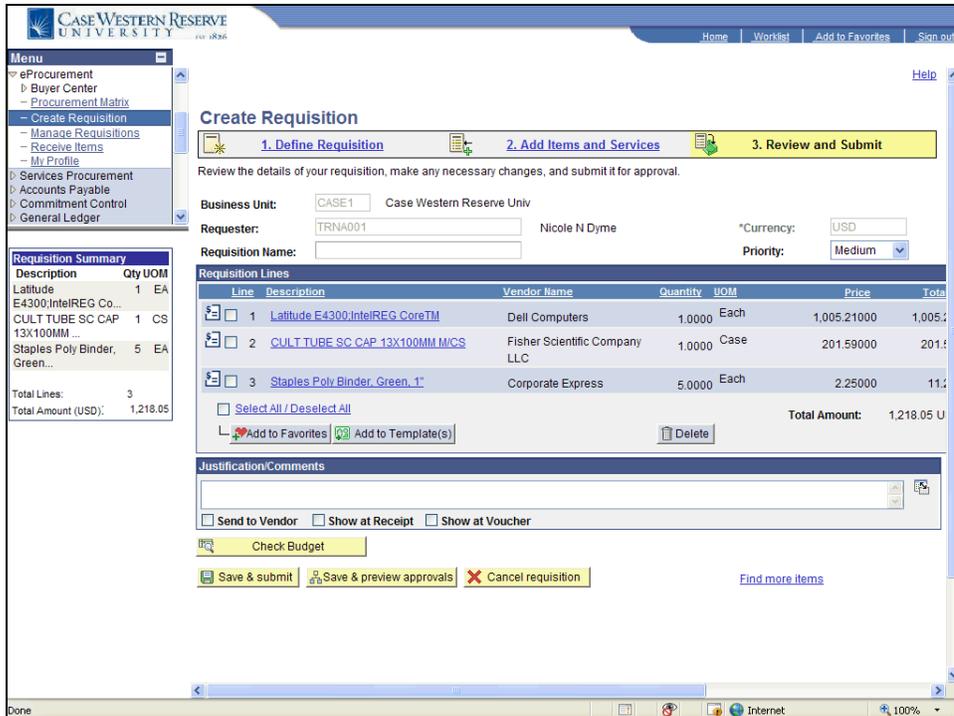
Step	Action
33.	<p>The Fisher Scientific confirmation page appears. If the order is correct. Click the <b>Submit Order</b> button.</p> 



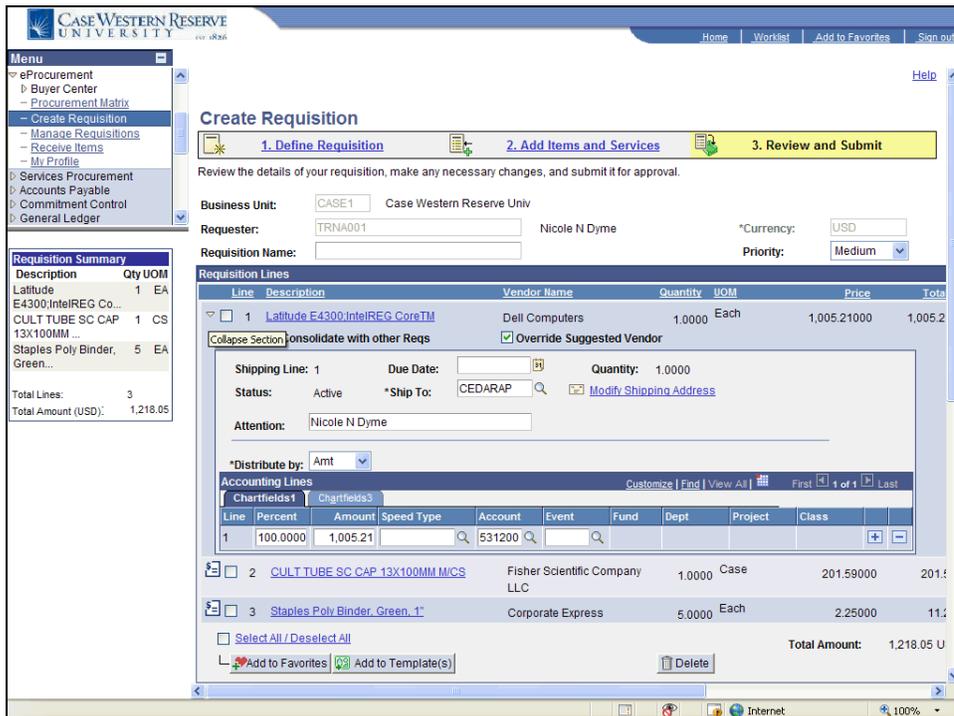
Step	Action
34.	The purchase goes back to your SmartCART. There are 3 vendor orders in the same Cart. Name this cart for reference by entering a name in the <b>Cart Name</b> field. For this example, enter <b>"Smith Lab Order"</b> .
35.	Click the <b>Place Order</b> link.



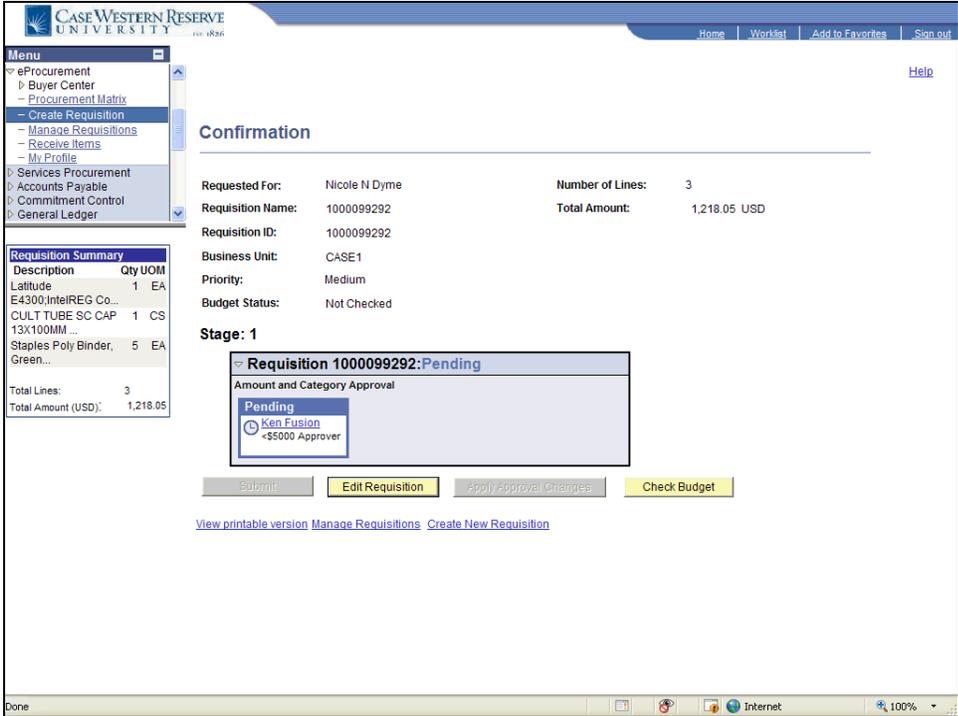
Step	Action
36.	<p>The items are integrated into Financials. Notice the items in the Requisition Summary to the left.</p> <p>To finish creating the requisition, click the <b>3. Review and Submit</b> link.</p> <p><a href="#">3. Review and Submit</a></p>



Step	Action
37.	Click the <b>Expand Section</b> button. 



Step	Action
38.	Enter the correct SpeedType in the <b>Speed Type</b> field.
39.	To input the Accounting Lines for the next item, click the <b>Expand Section</b> button. 
40.	Enter the correct SpeedType in the <b>Speed Type</b> field.
41.	To input the Accounting Lines for the last item, click the <b>Expand Section</b> button. 
42.	Enter the correct SpeedType in the <b>Speed Type</b> field.
43.	Click the <b>Save &amp; submit</b> button.



**Confirmation**

Requested For: Nicole N Dyme      Number of Lines: 3  
 Requisition Name: 1000099292      Total Amount: 1,218.05 USD  
 Requisition ID: 1000099292  
 Business Unit: CASE1  
 Priority: Medium  
 Budget Status: Not Checked

**Stage: 1**

**Requisition 1000099292: Pending**

Amount and Category Approval

Pending  
 Ken Fusion  
 \$5000 Approver

Submit    Edit Requisition    Apply Approval Changes    Check Budget

[View printable version](#)   [Manage Requisitions](#)   [Create New Requisition](#)

Description	Qty	UOM
Latitude	1	EA
E4300,IntelREG Co...		
CULT TUBE,SC CAP	1	CS
13X100MM...		
Staples Poly Binder,	5	EA
Green...		
<b>Total Lines:</b>	<b>3</b>	
<b>Total Amount (USD):</b>	<b>1,218.05</b>	

Step	Action
44.	The Approval page appears. If no approvals are necessary, the items are approved. If there are more approvals needed, those will be listed here. To review the requisition, you can use the Manage Requisitions link. <a href="#">Manage Requisitions</a>
45.	This completes How to Place an Order from Multiple Vendors using SmartCART. <b>End of Procedure.</b>

## Ship To Locations

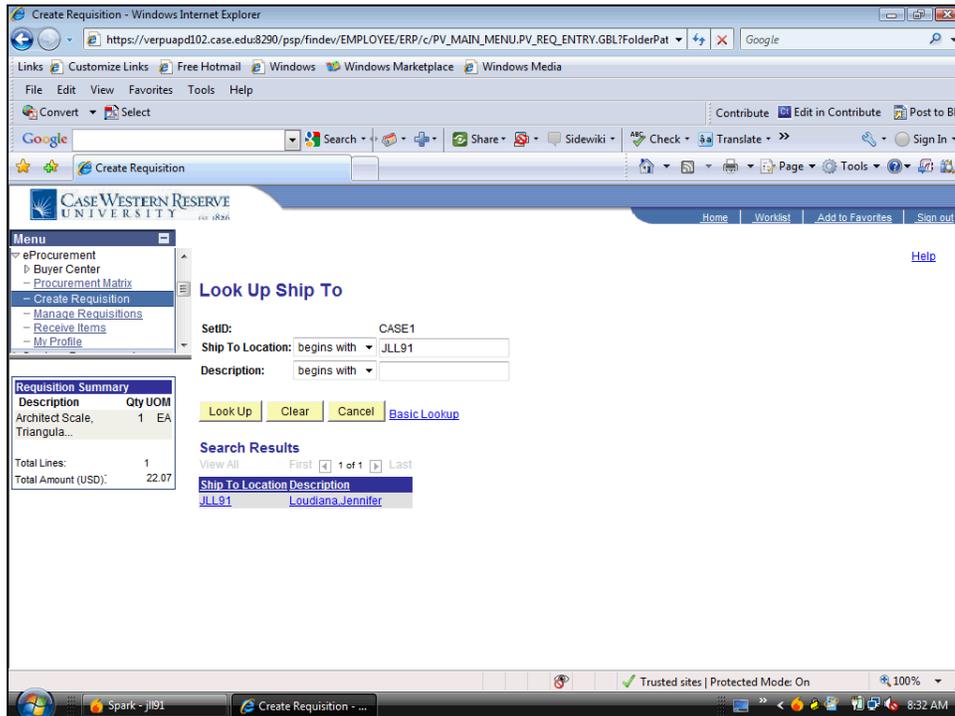
### Procedure

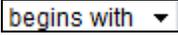
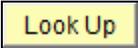
Shipping Addresses will now be available within the eProcurement system. Users will not need to Modify Shipping Addresses.

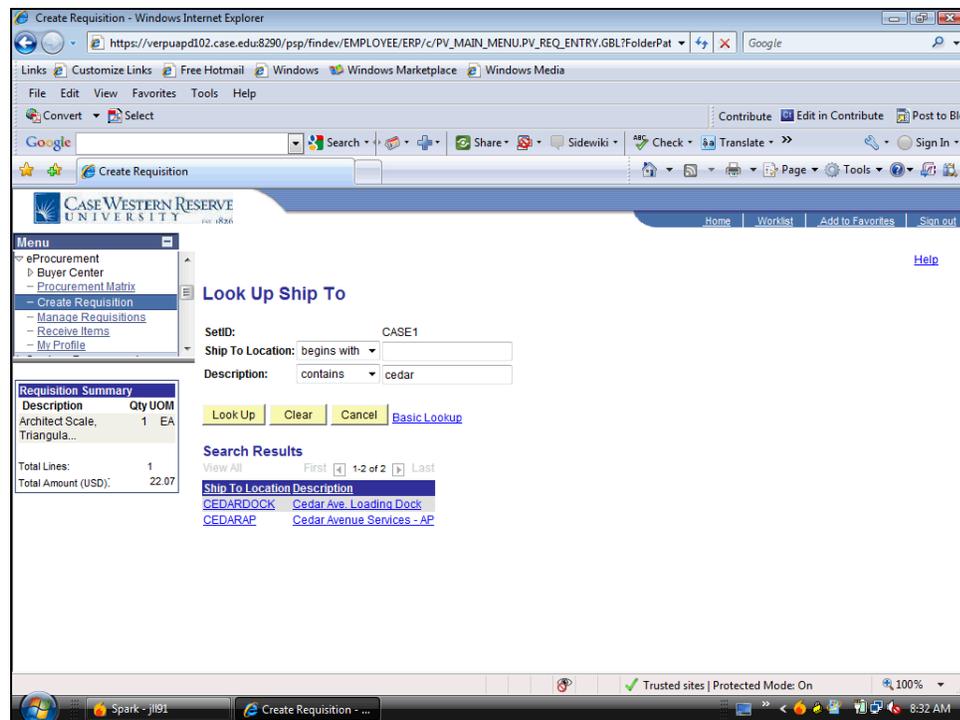
The information below will explain how to choose a different shipping address.

If your address is not in the system, please fill out the Ship To Location form on the Procurement website at <http://campusservices.case.edu/PDSHome.aspx> or by emailing information to [smartcart@case.edu](mailto:smartcart@case.edu).

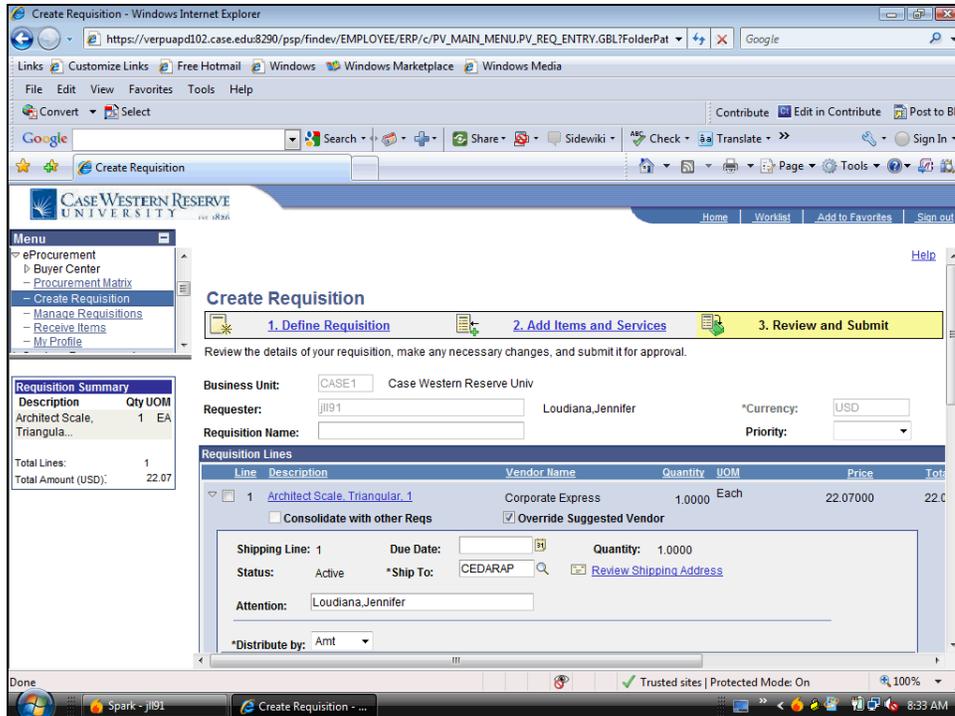
Step	Action
1.	The Ship To: will default to your ID as the location. If you want to change the location, click the <b>Look up</b> button to see a list or search for a location. 



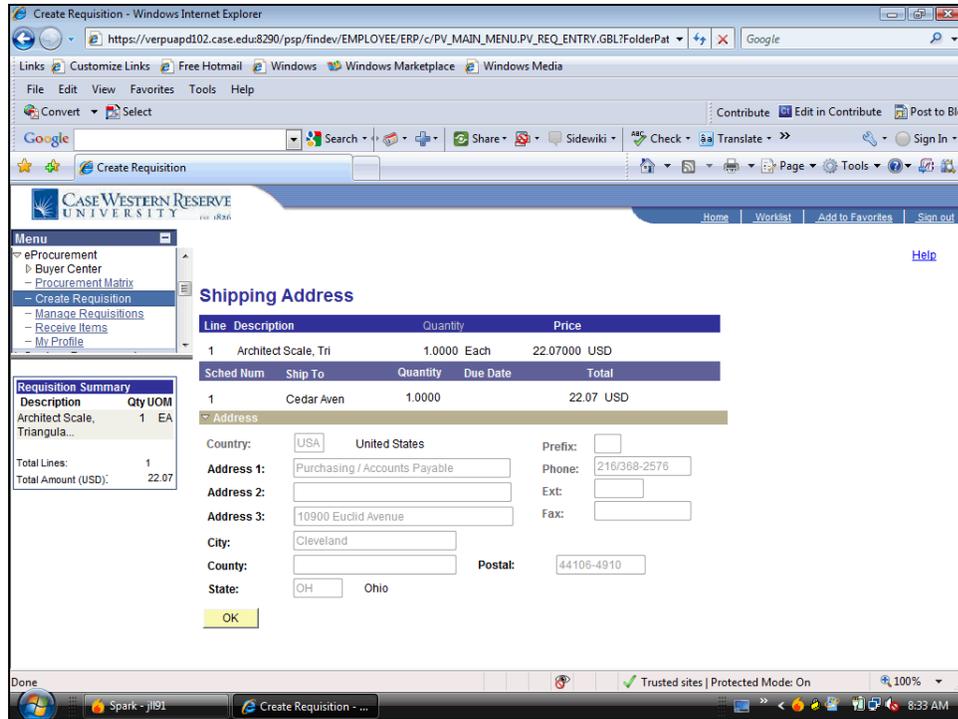
Step	Action
2.	The Look Up Ship To page appears and will default to the location already in the ShiptTo on the screen, in this example it was a user ID.  For the Description: click <b>contains</b> from the dropdown list. 
3.	Enter a short search into the <b>Description</b> field, for example, enter " <b>cedar</b> " to send an item to the Accounts Payable office.
4.	Click the <b>Look Up</b> button. 

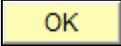


Step	Action
5.	Results for any description that has the word cedar will appear. To send to Accounts Payable, click the <b>CEDARAP</b> link. 



Step	Action
6.	<p>The <b>Ship To:</b> is now CEDARAP. To make sure the address is correct, click the <b>Review Shipping Address</b> link.</p> <p><a href="#">Review Shipping Address</a></p>



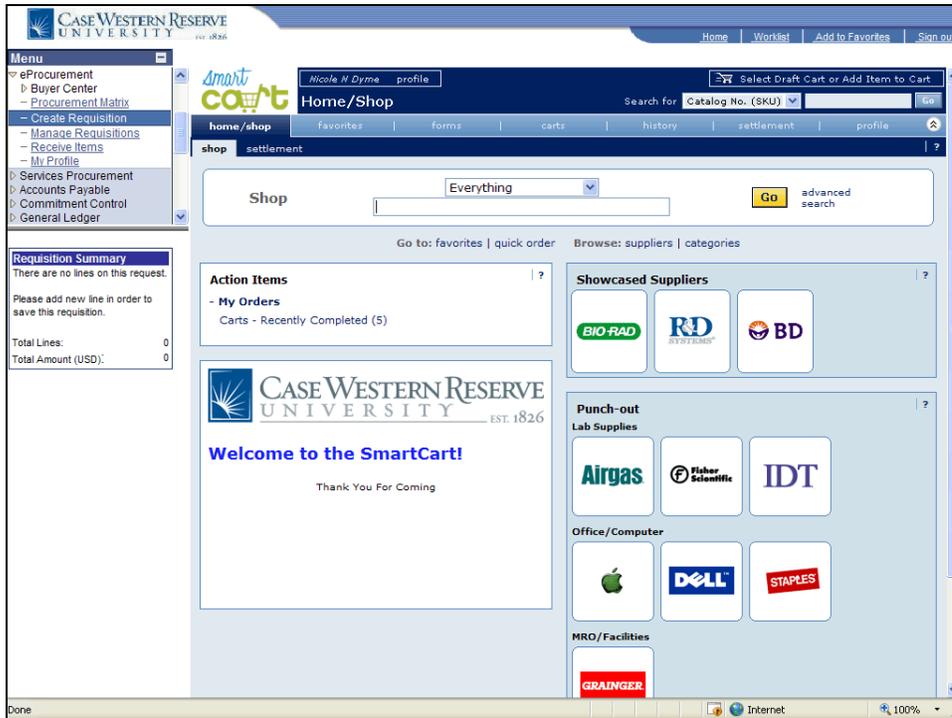
Step	Action
7.	A non-editable <b>Shipping Address</b> screen appears. Review for accuracy, when finished click <b>OK</b> to return the requisition. 
8.	For questions on Ship To: locations contact Procurement and Distribution at 368-2560 or email smartcart@case.edu <b>End of Procedure.</b>

## Viewing Carts and Draft Carts

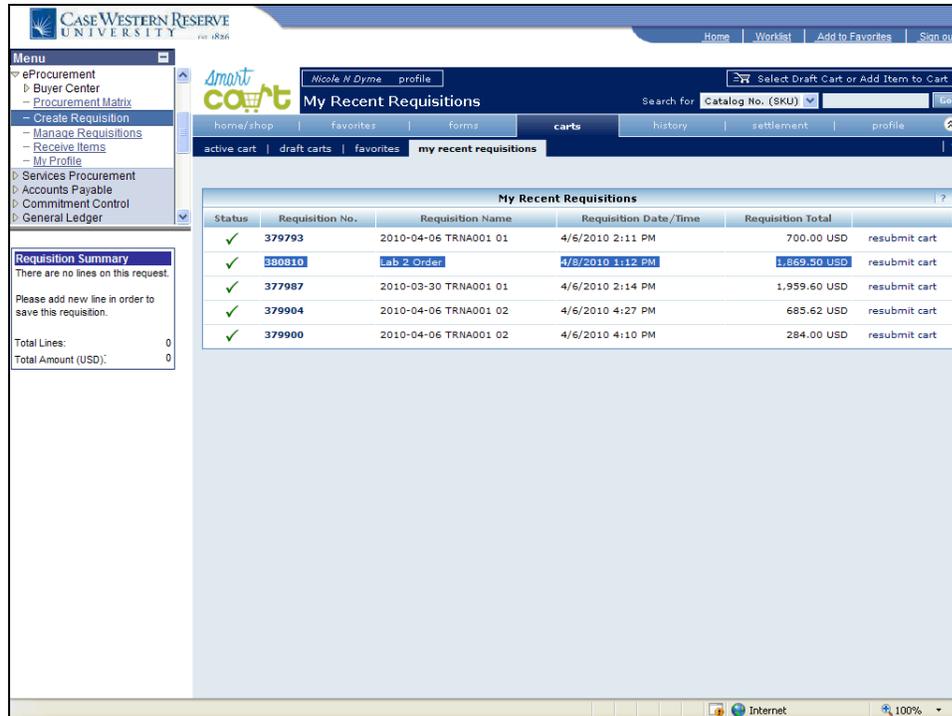
This section will demonstrate how to view and navigate your carts.

### Procedure

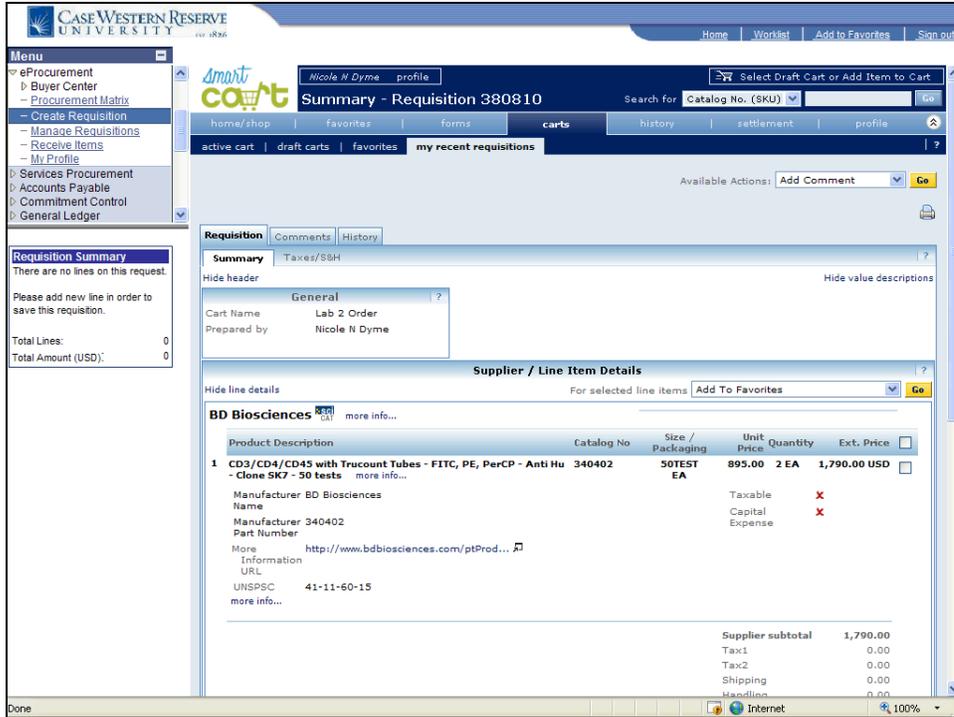
To begin, log into Financials and proceed to Create Requisition and navigate to the SmartCART Home Page. See the document "Using the SmartCART System" for information.



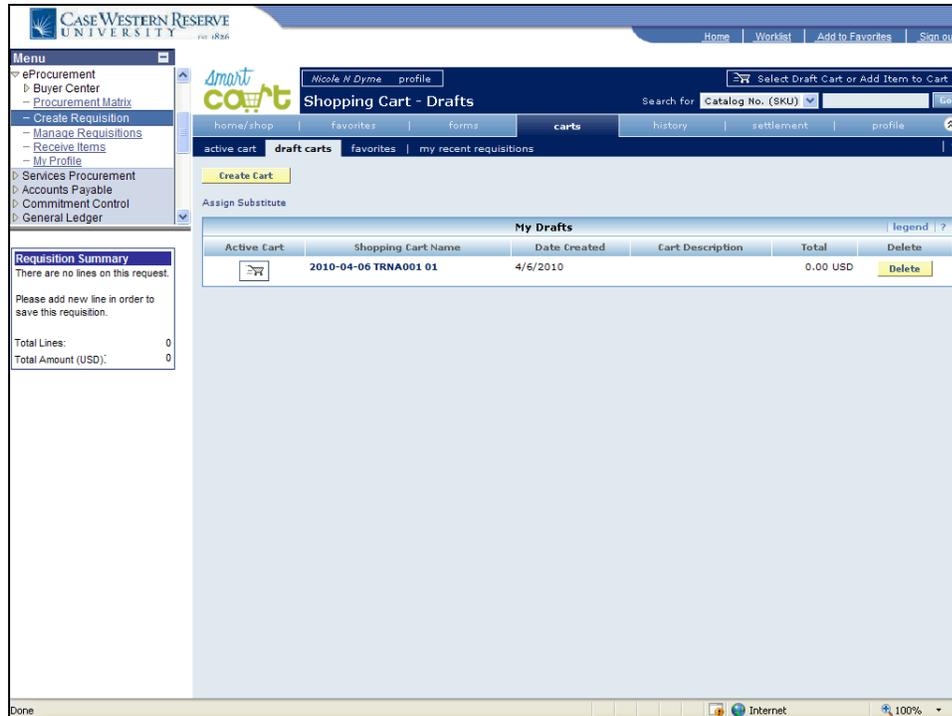
Step	Action
1.	The SmartCART home page has an Action Items box that will appear after you have placed SmartCART orders. Click the <b>Carts - Recently Completed (5)</b> link. <a href="#">Carts - Recently Completed (5)</a>



Step	Action
2.	<p>Click the <b>380810</b> link.</p> <p>The My Recent Requisitions screen appears. There will be a list of all the SmartCART purchases with the name, date/time, total dollar amount purchased.</p> <p>Click the <b>Cart number</b> link of the cart you would like to view.</p> <p><b>380810</b></p>



Step	Action
3.	The cart opens with the Supplier/Line Item Details.  The items purchased in this cart and details are able to be viewed.
4.	Click the <b>draft cart</b> menu item.



Step	Action
5.	<p>A list of My Drafts will appear. These are carts that have not been ordered or have been started and not completed. To return back to the SmartCART Home, click the <b>home/shop</b> object.</p> <p></p>
6.	<p>This concludes the section on Viewing your Carts in SmartCART. <b>End of Procedure.</b></p>

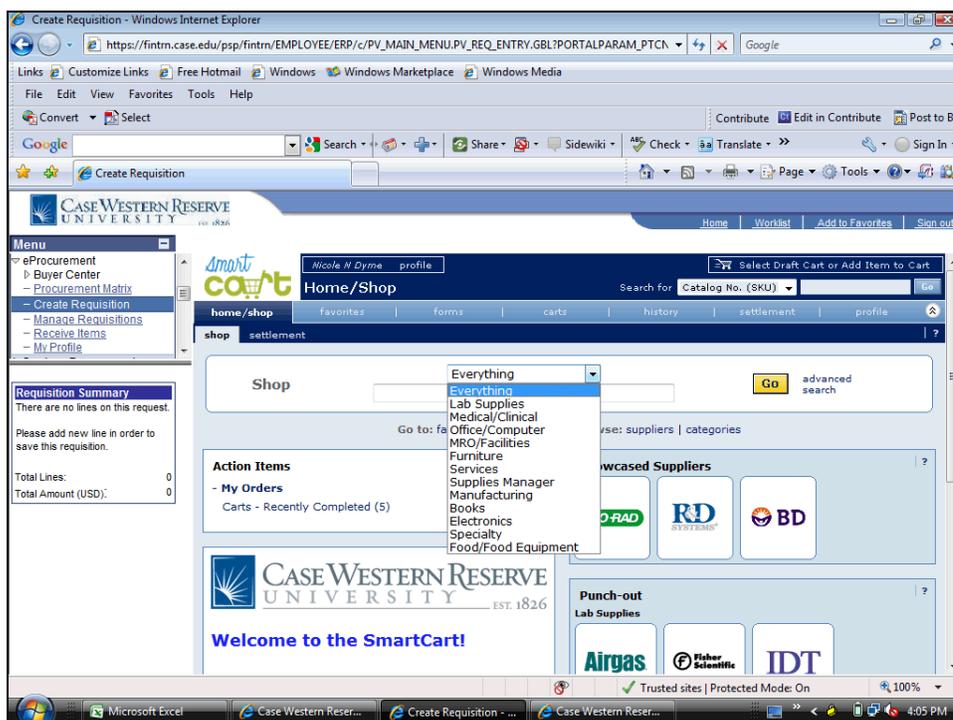
## Searching in SmartCart

This section describes using the search feature in SmartCART. Searching in SmartCART is only available for **Hosted Catalogs**. Punchout Catalogs **can not** be searched within SmartCART

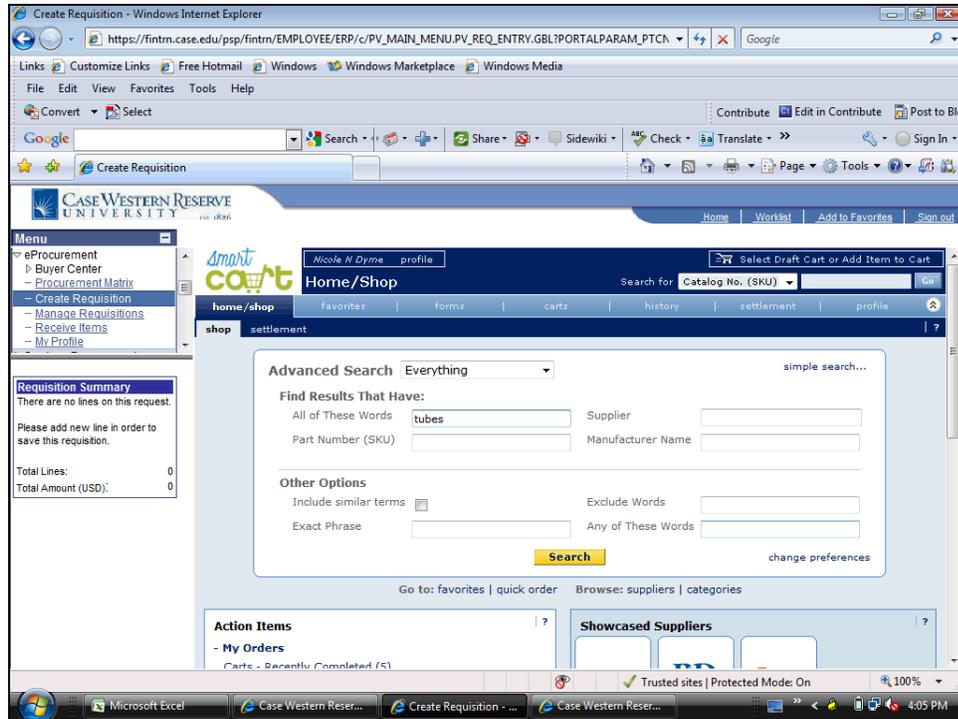
### Procedure

To begin, log into Financials and navigate by Creating a Requisition and entering the SmartCART Home Page.

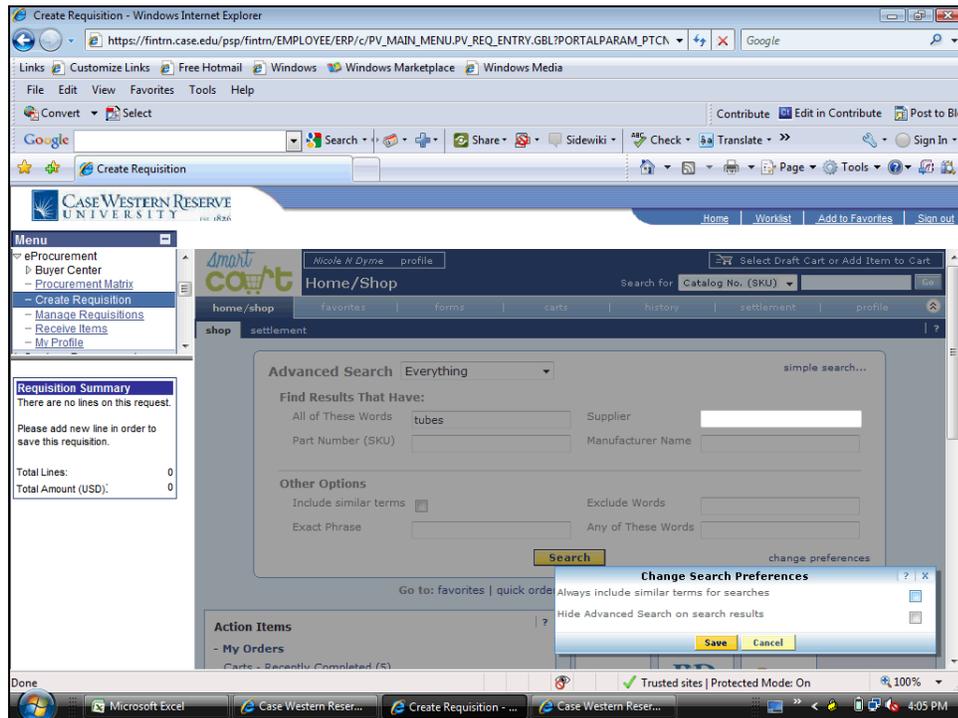
Step	Action
1.	" <i>Shop at the Top</i> " is located on the home page. The drop down allows you to narrow your search by categories.



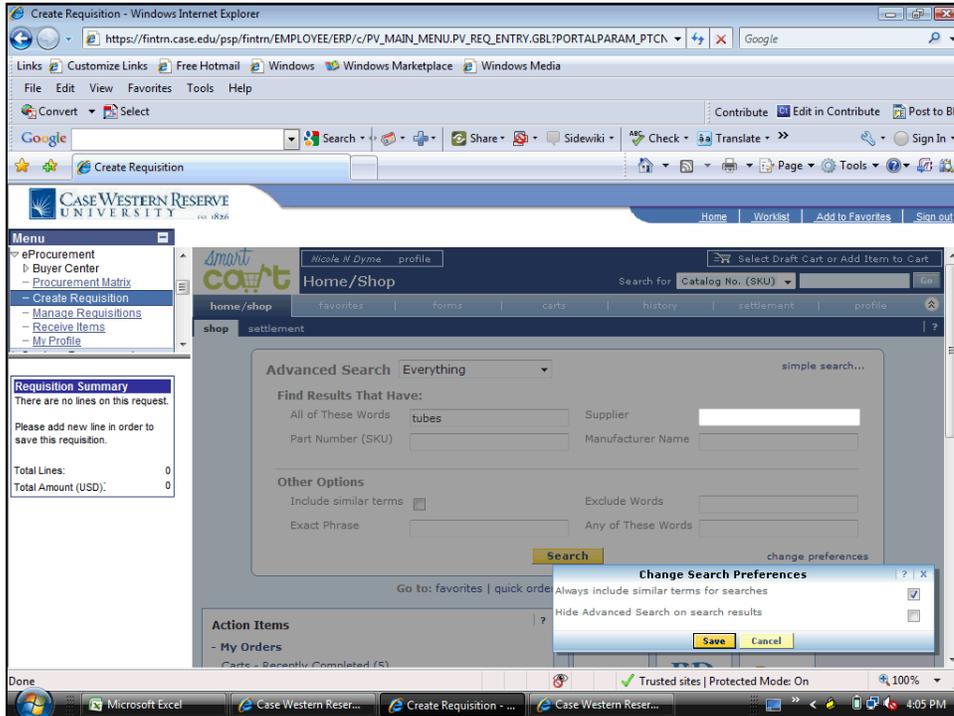
Step	Action
2.	Click the <b>Shop dropdown</b> to view a list of the searchable categories.
3.	Enter your the key words for the items to search in the <b>Shop</b> field. For our example, enter " <b>tubes</b> ".
4.	The first time the search is used, set your preferences to allow searching for all like items with the keywords. Click the <b>advanced search</b> link.



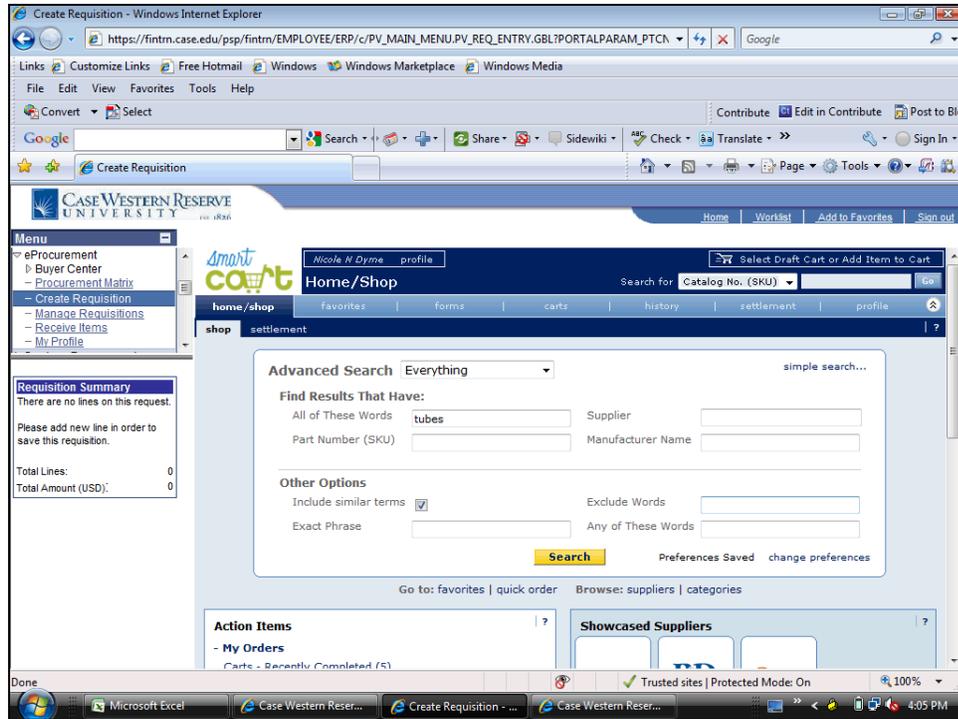
Step	Action
5.	Click the <b>change preferences</b> link. <a href="#">change preferences</a>



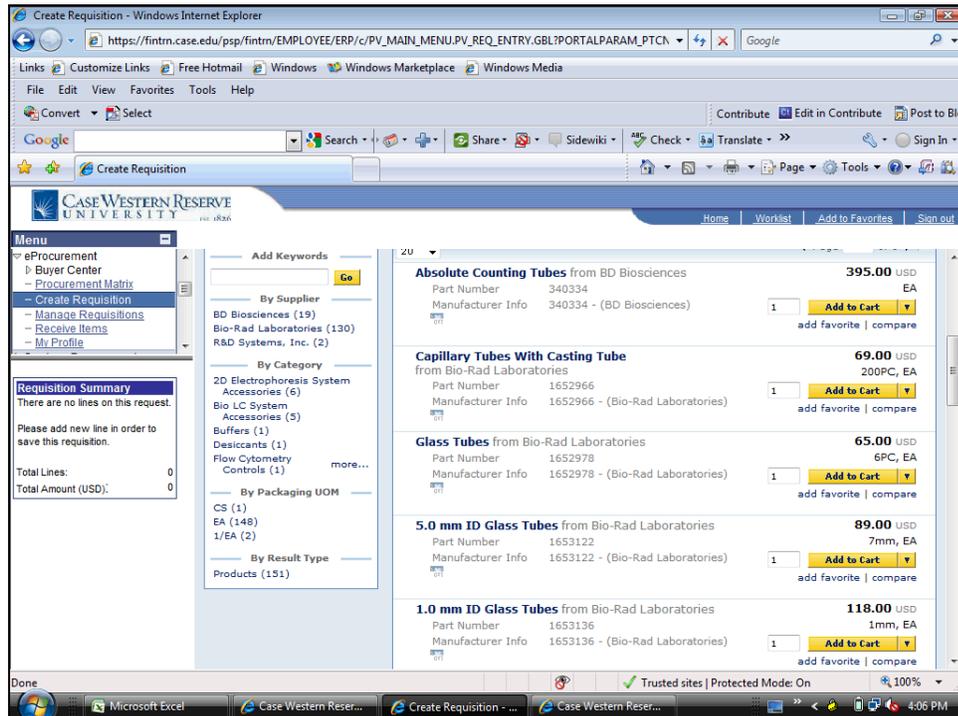
Step	Action
6.	Click the <b>Always include similar terms for searches</b> option.



Step	Action
7.	Click the <b>Save</b> button.



Step	Action
8.	Click the <b>Search</b> button to execute your search. 

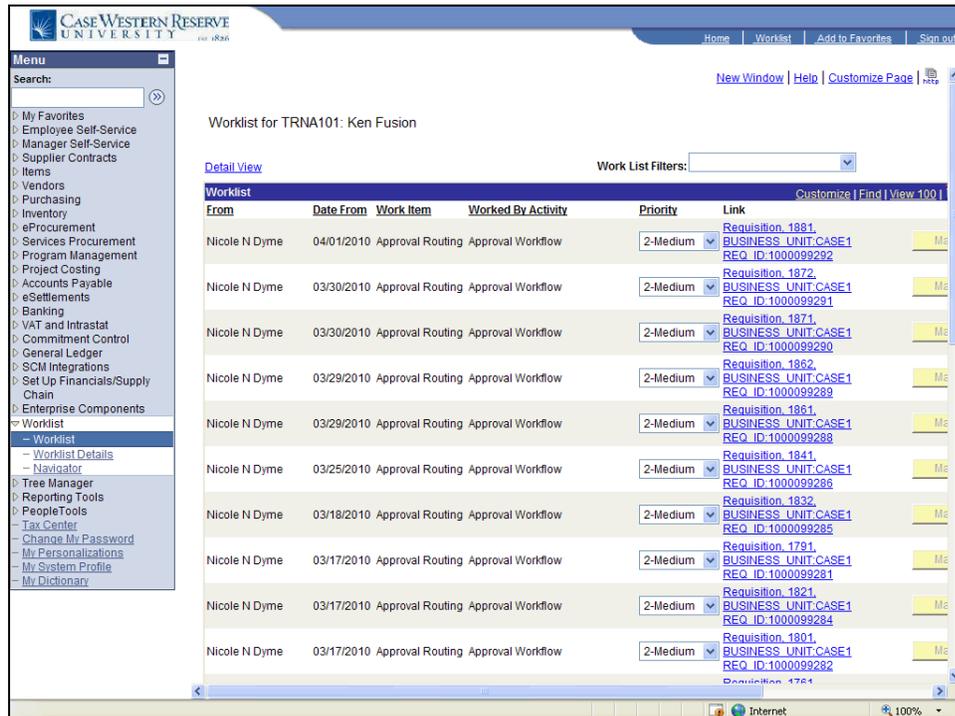


Step	Action
9.	<p>The search returns all items with the keywords you entered from all Hosted Catalog suppliers.</p> <p>To purchase an item from your search, proceed to enter the amount and add to your cart.</p> <p>Process the order and cart.</p>
10.	<p>This completes how to search Hosted Catalogs in the SmartCART system.</p> <p><b>End of Procedure.</b></p>

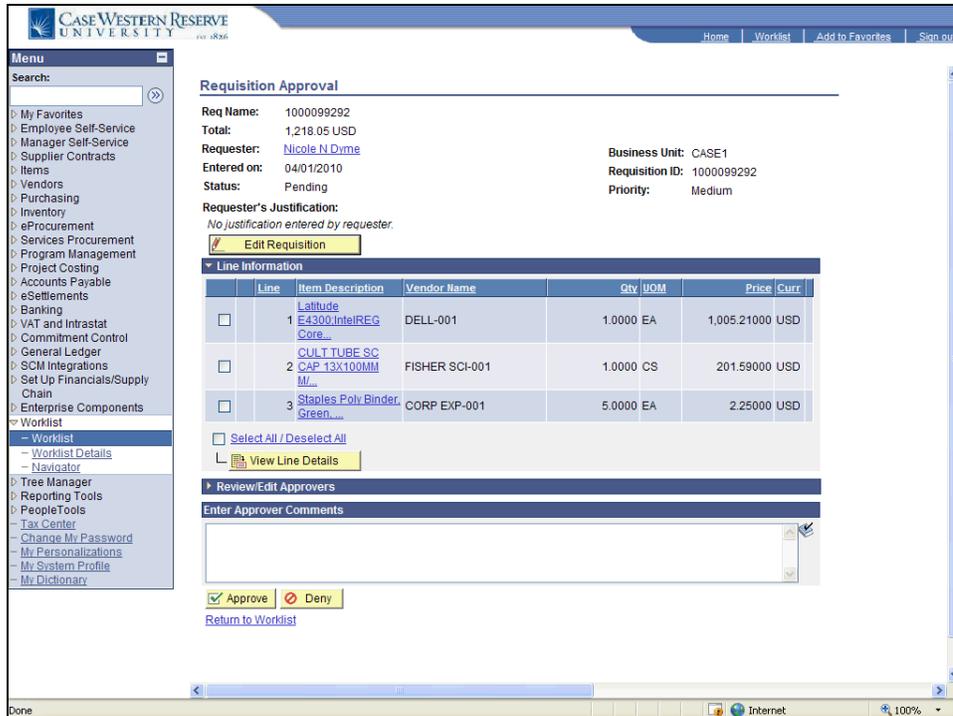
## Approving Requisitions ordered in SmartCART

### Procedure

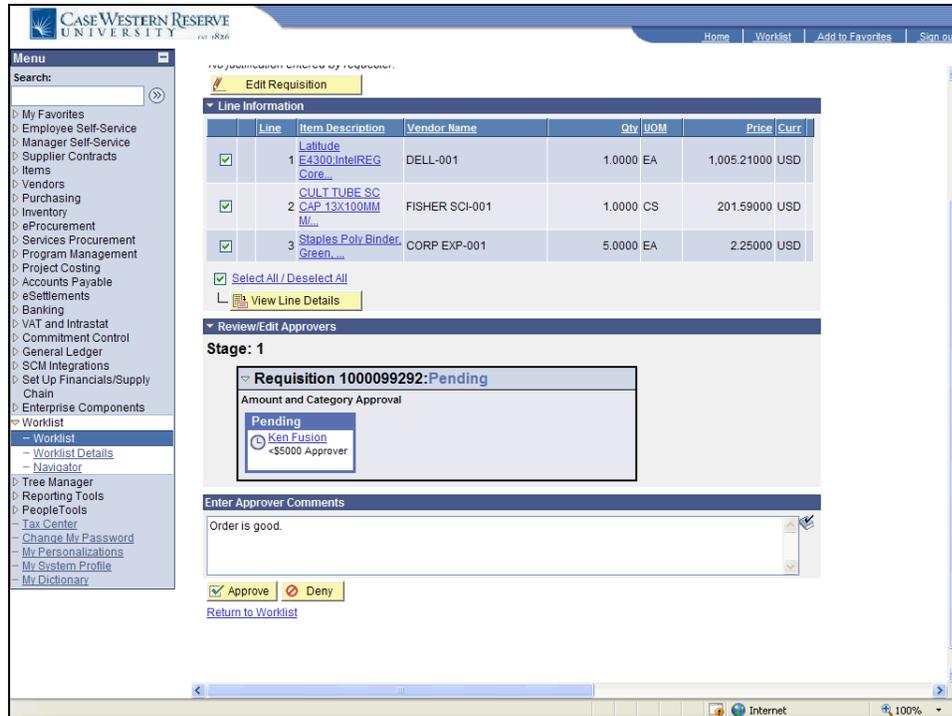
To begin, log into Financials and click your Worklist to begin.

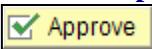


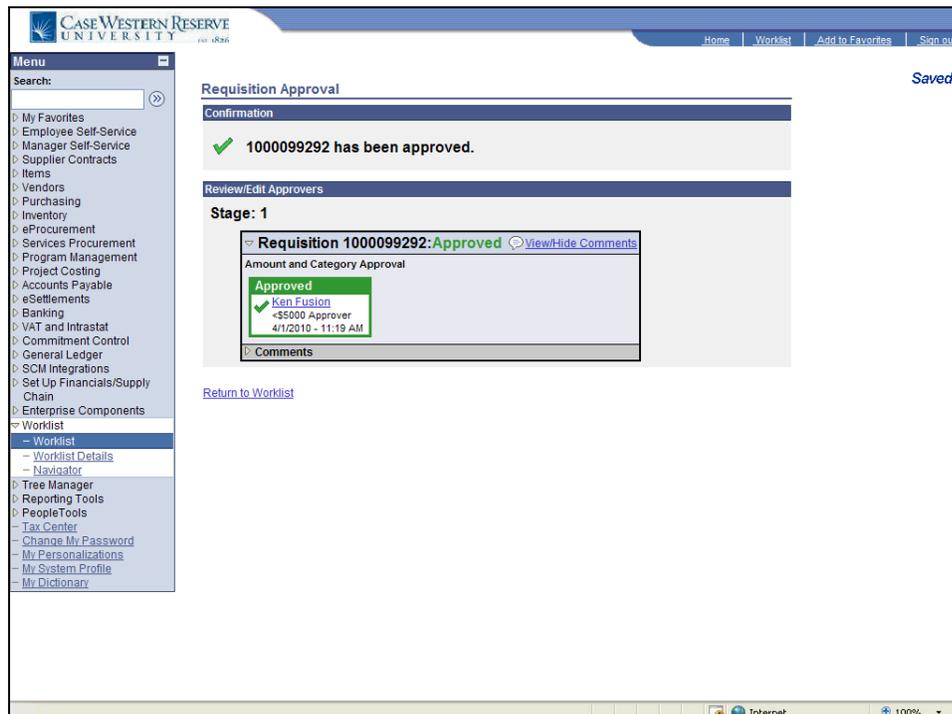
Step	Action
1.	The Worklist screen looks the same, choose a requisition by clicking on the detailed link (for example <b>Requisition, 1881, BUSINESS_UNIT:CASE1 REQ_ID:100009929</b> ) in the link column.



Step	Action
2.	<p>The Requisition Approval screen appears.</p> <p>As in all requisitions being approved you can Edit the Requisition or Approve or Deny it.</p> <p><b>NOTE:</b> Editing at this point will not update the SmartCART so the Requisition and Purchase Order will not be in sync when doing historical searches.</p> <p>To Approve the Requisition, click the check box for the item(s) to approve.</p>



Step	Action
3.	Click the <b>Approve</b> button. 



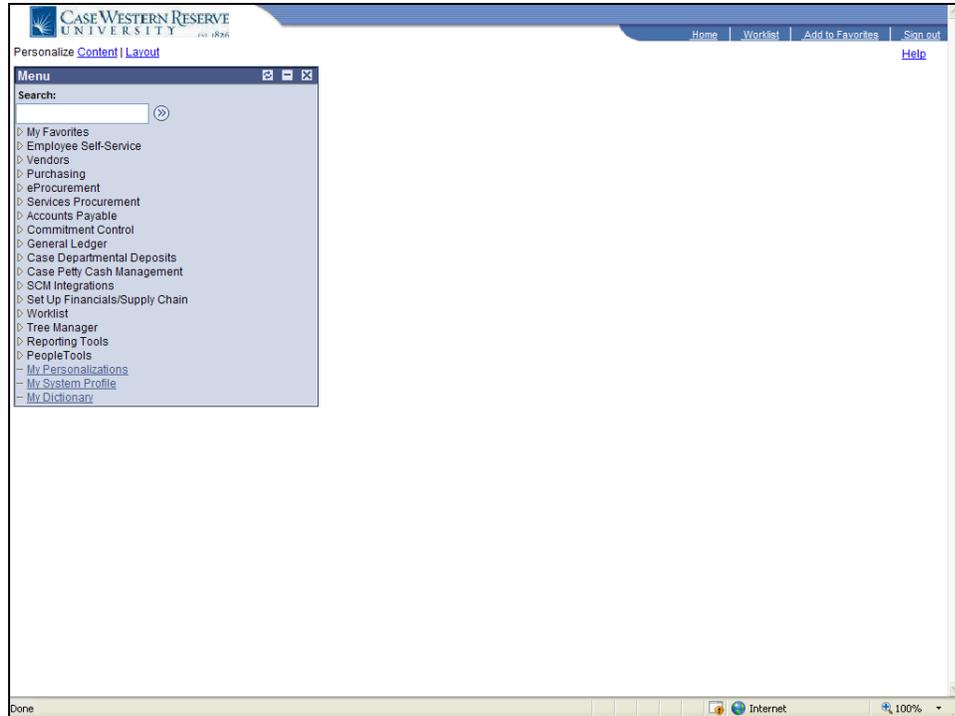
Step	Action
4.	The Confirmation of approval screen appears. 
5.	You may return to your worklist. Click the <b>Return to Worklist</b> link. <a href="#">Return to Worklist</a>
6.	This concludes the section on how to approve SmartCART requisitions.  Note after approvals, there is not buyer a Purchase Order will automatically be created for the items ordered. <b>End of Procedure.</b>

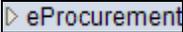
## Manage Requisitions that were created in SmartCART

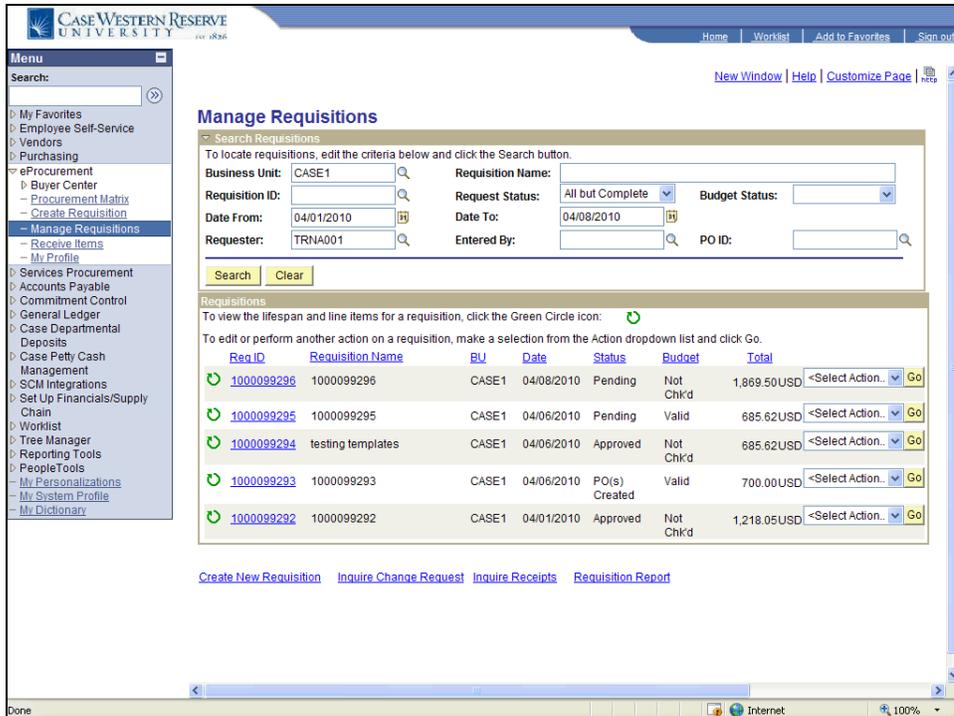
This section will explain how to view and manage the created requisitions from SmartCART.

### Procedure

To begin, log into Financials and navigate to the SmartCART Home page.



Step	Action
1.	The navigation path for Manage Requisitions is not different for SmartCART. Click the <b>eProcurement</b> link. 
2.	Click the <b>Manage Requisitions</b> link. 



Step	Action
3.	<p>As you can see, the Requisitions that were created in SmartCART appear the same as those created using the Special Item option.</p> <p>Click the <b>Select Action</b> dropdown to see options for the Requisition.</p> 
4.	<p>Click the <b>Circle of Life</b> icon to see the status of the processing of the Requisition.</p>

**Manage Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: CASE1 Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 04/01/2010 Date To: 04/08/2010

Requester: TRNA001 Entered By:  PO ID:

**Requisitions**

To view the lifespan and line items for a requisition, click the Green Circle icon:

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
1000099296	1000099296	CASE1	04/08/2010	Pending	Not Chkd	1,869.50USD	<Select Action...> Go

Nicole N Dyme Entered By: Nicole N Dyme Priority: Medium

**Request Lifespan:**

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

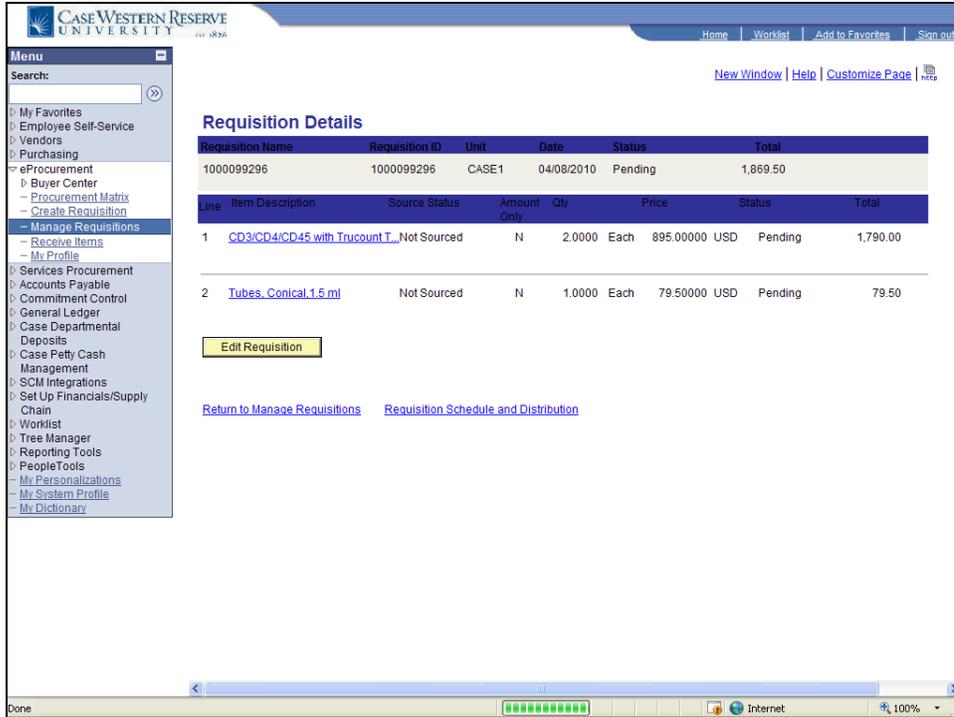
**Line Information**

Line	Description	Status	Price	Curr	Quantity	UOM	Vendor
1	CD3/CD4/CD45 with Trucount T...	Pending Approval	895.00000	USD	2.0000	EA	BD Biosciences
2	Tubes, Conical, 1.5 ml	Pending Approval	79.50000	USD	1.0000	EA	Bio Rad Laboratories

1000099295 1000099295 CASE1 04/06/2010 Pending Valid 685.62USD <Select Action...> Go

1000099294 testing templates CASE1 04/06/2010 Approved Not Chkd 685.62USD <Select Action...> Go

Step	Action
5.	Note the status. The status <b>Pending Approval</b> indicates there are approvals in the workflow.
6.	Click the <b>Req ID</b> link for the requisition to view. <a href="#">1000099296</a>



**Menu**

Search:

- My Favorites
- Employee Self-Service
- Vendors
- Purchasing
- eProcurement
  - Buyer Center
  - Procurement Matrix
  - Create Requisition
  - Manage Requisitions
  - Receive Items
  - My Profile
- Services Procurement
- Accounts Payable
- Commitment Control
- General Ledger
- Case Departmental Deposits
- Case Petty Cash Management
- SCM Integrations
- Set Up Financials/Supply Chain
- Worklist
- Tree Manager
- Reporting Tools
- PeopleTools
- My Personalizations
- My System Profile
- My Dictionary

**Requisition Details**

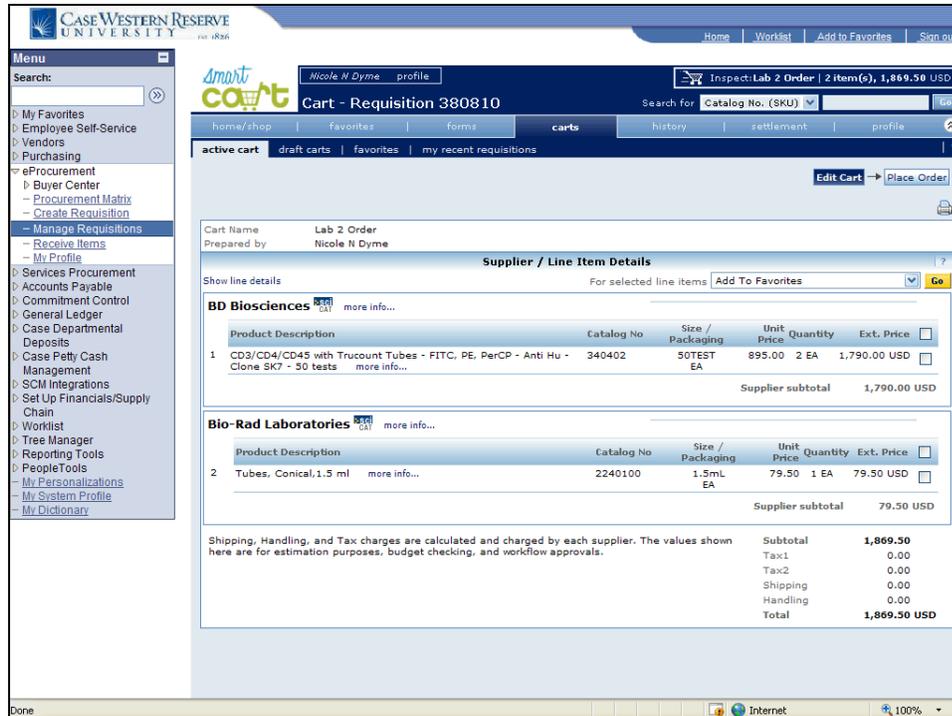
Requisition Name	Requisition ID	Unit	Date	Status	Total
1000099296	1000099296	CASE1	04/08/2010	Pending	1,869.50

Line	Item Description	Source Status	Amount Only	Qty	Price	Status	Total
1	<a href="#">CD3/CD4/CD45 with Trucount T...</a>	Not Sourced	N	2.0000	Each 895.00000 USD	Pending	1,790.00
2	<a href="#">Tubes, Conical, 1.5 ml</a>	Not Sourced	N	1.0000	Each 79.50000 USD	Pending	79.50

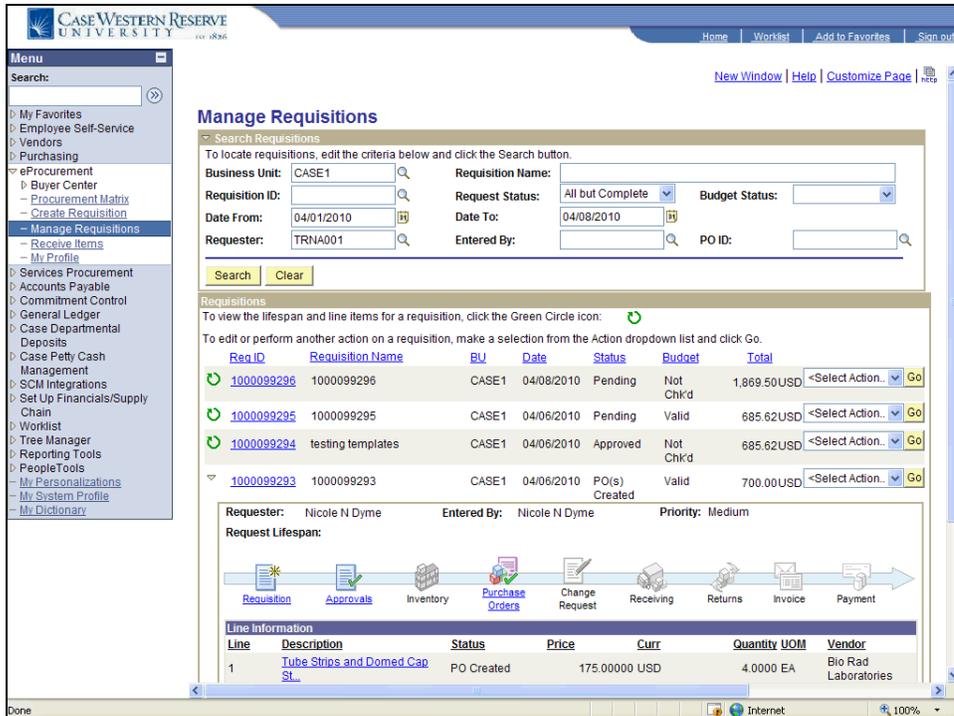
[Edit Requisition](#)

[Return to Manage Requisitions](#)   [Requisition Schedule and Distribution](#)

Step	Action
7.	The Requisition opens with a list of the items. To see the details about each item, click the <b>item name</b> link. <a href="#">CD3/CD4/CD45 with Trucount T...</a>



Step	Action
8.	The SmartCART cart appears with the item information. Depending on the vendor, some will allow View Details links which will allow you to go to the cart and view the item(s) you purchased.
9.	To return to the Manage Requisitions screen, click the <b>Manage Requisitions</b> link in the left Financials Menu.



Step	Action
10.	<p>In this example, in Manage Requisitions, this SmartCART item has a PO Created in the status.</p> <p>Utilize the Cycle of Life within Financials Manage Requisitions to follow the life of your requisition and Purchase Orders.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <p><b>Status</b></p> <p>PO Created</p> </div>
11.	<p>The concludes the section how to Manage Requisitions that were created in SmartCART.</p> <p><b>End of Procedure.</b></p>

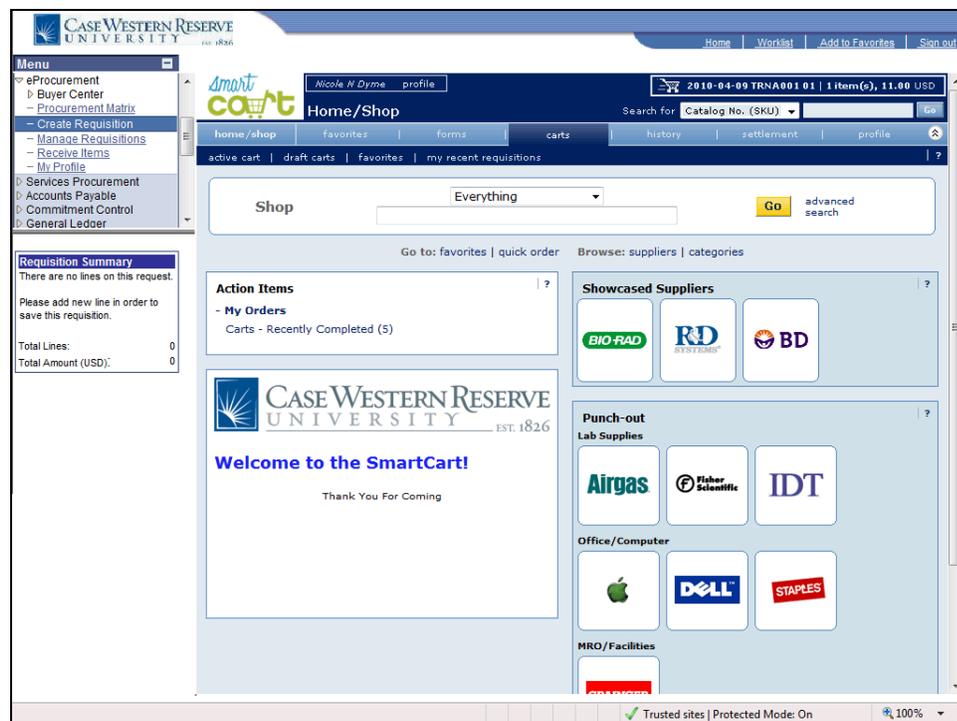
## Copying Carts for new orders

This section explains how to copy a SmartCART carts and place a new order of the same items.

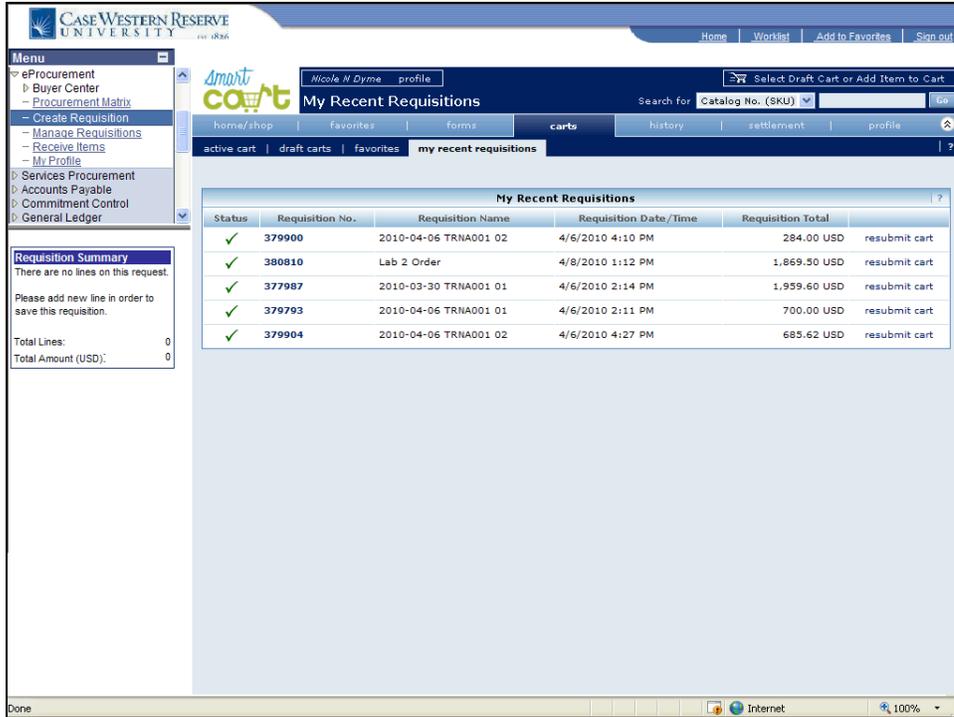
### Procedure

To begin, log into Financials and navigate to the SmartCART Home page.

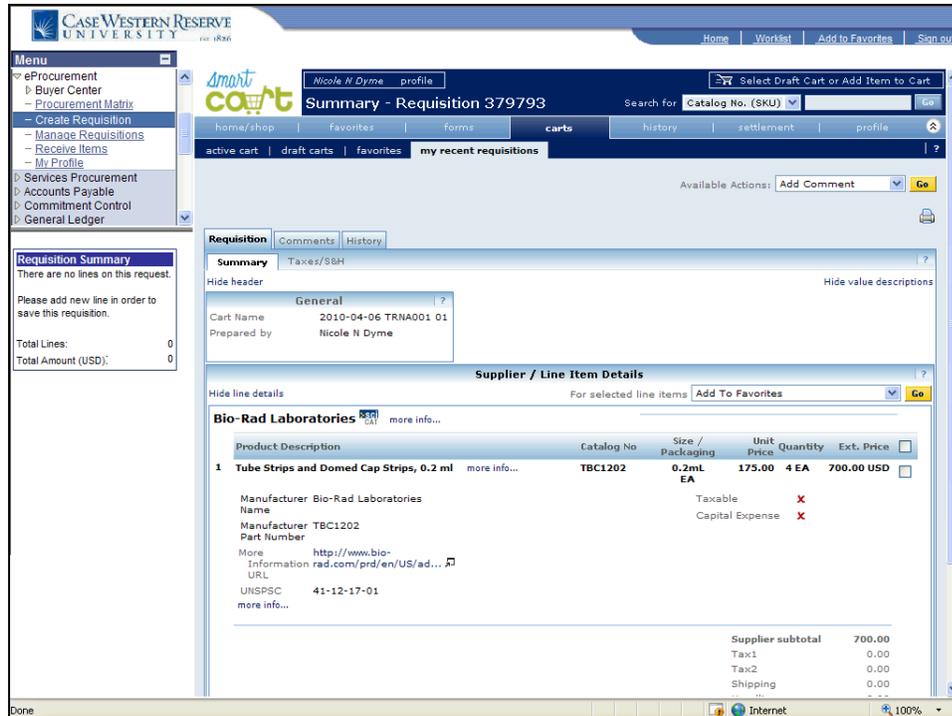
Step	Action
1.	Click the <b>carts</b> menu item. 

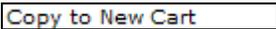


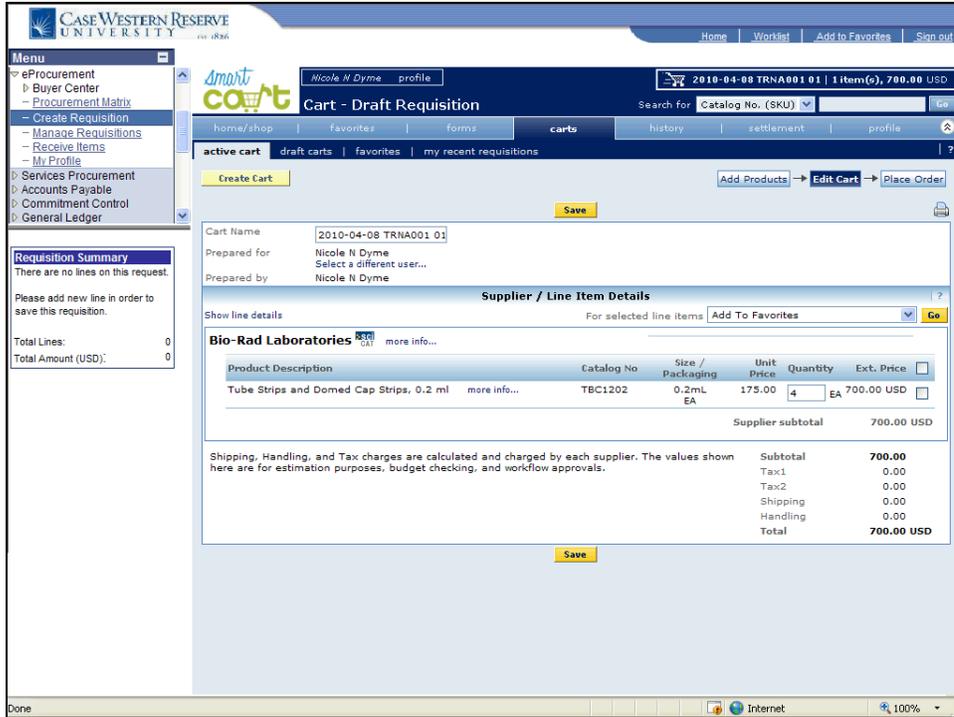
Step	Action
2.	Click the <b>my recent requisitions</b> object. 



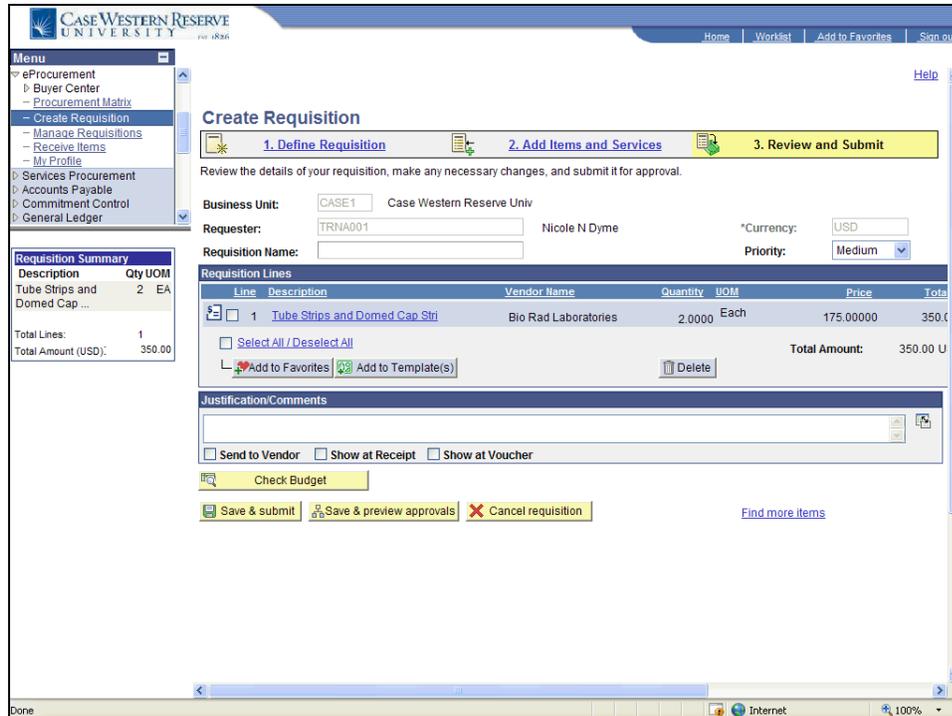
Step	Action
3.	A list of <b>My Recent Requisitions</b> appears. Click on one of the Requisition No. link. For this example click <b>379793</b> .



Step	Action
4.	The detailed cart will open. Click the <b>Available Actions:</b> dropdown list. 
5.	Choose <b>Copy to New Cart</b> list item. 
6.	Click the <b>Go</b> button. 



Step	Action
7.	A new cart will appear. Enter a new <b>Cart Name</b> .
8.	Altering the Quantity is allowed if the item is a hosted catalog.
9.	Click the <b>Place Order</b> link. 



Step	Action
10.	proceed to process the requisition as usual. <input type="checkbox"/>
11.	This concludes the section how to copy an old cart to re-order or add items. <b>End of Procedure.</b>

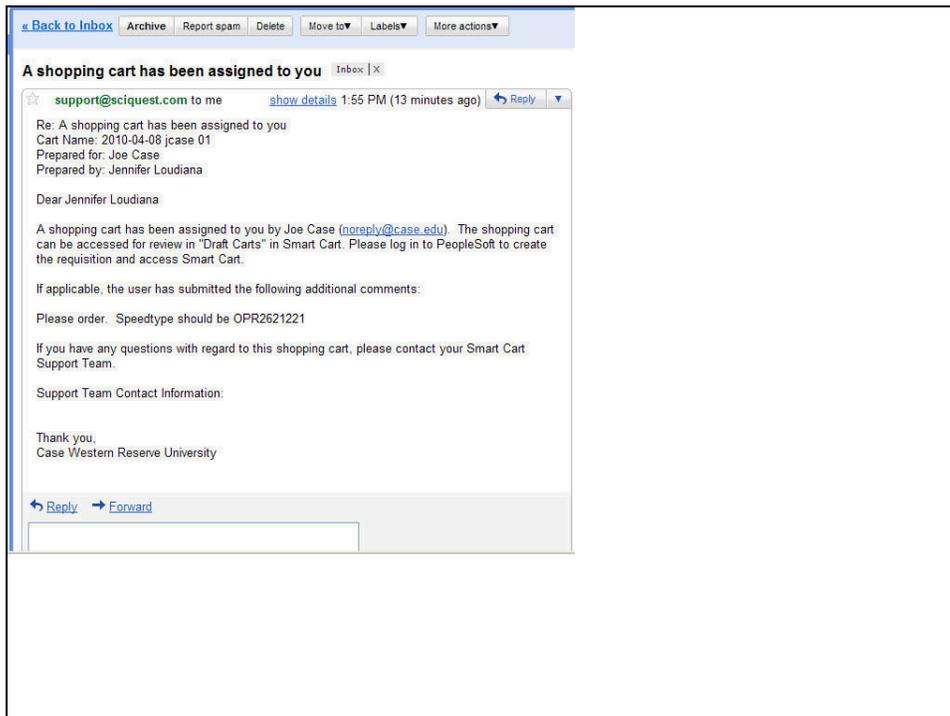
## Window Shopper Approvers - Approving & Placing Orders

### Procedure

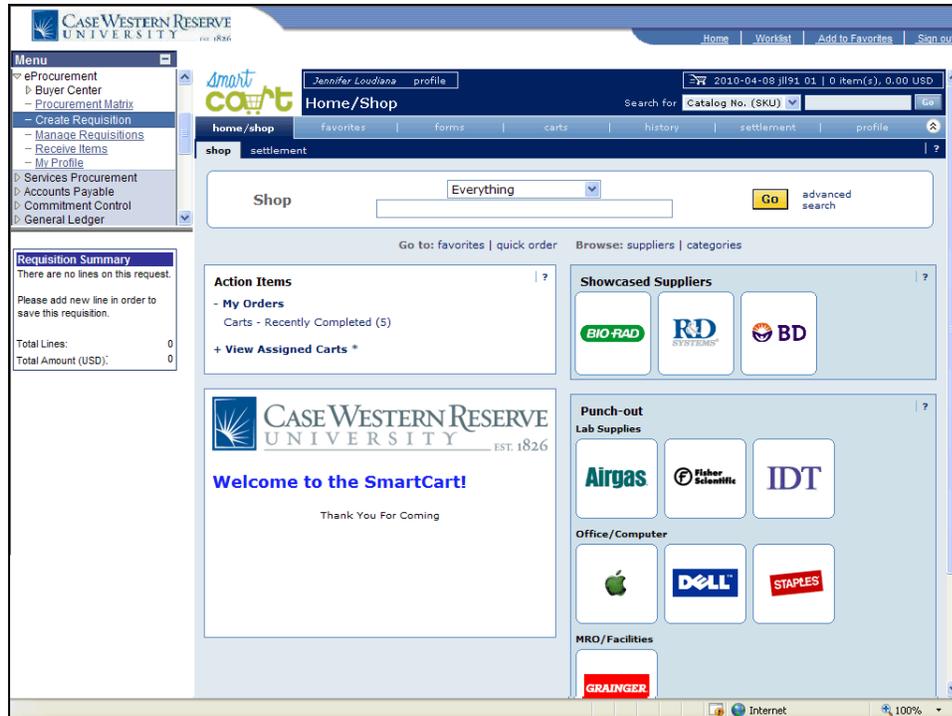
Approvers will receive an email to let them know a cart has been completed and assigned to them.

Once this email has been received the approver can log into Financials and proceed to the SmartCART home page.

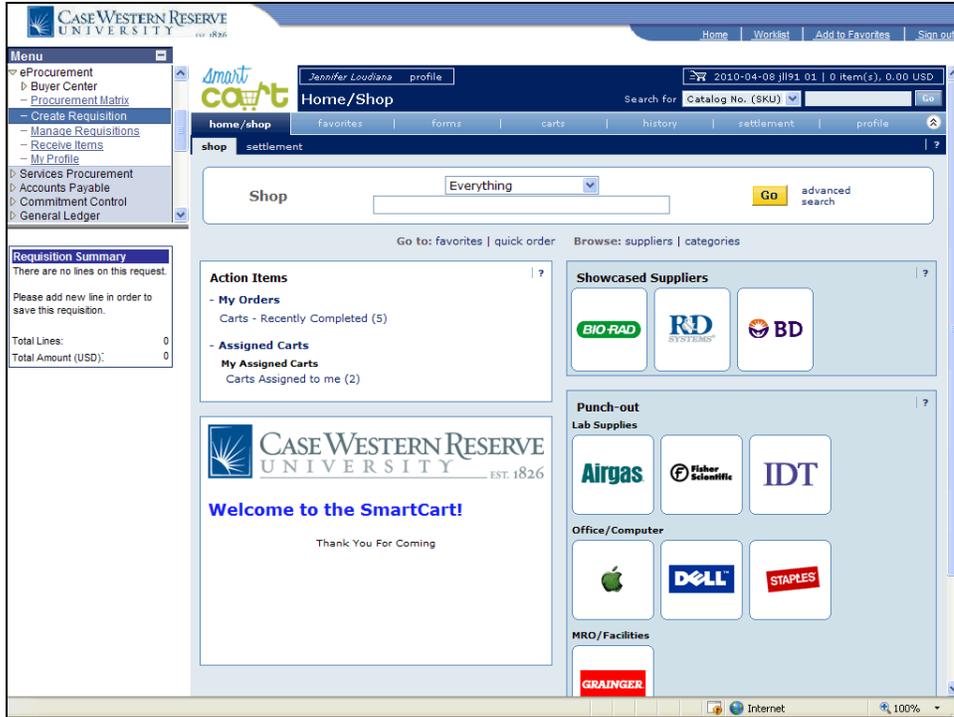
Step	Action
1.	Approvers will receive an email from <b>support@sciquest.com</b> with the subject of <b>A shopping cart has been assigned to you.</b>



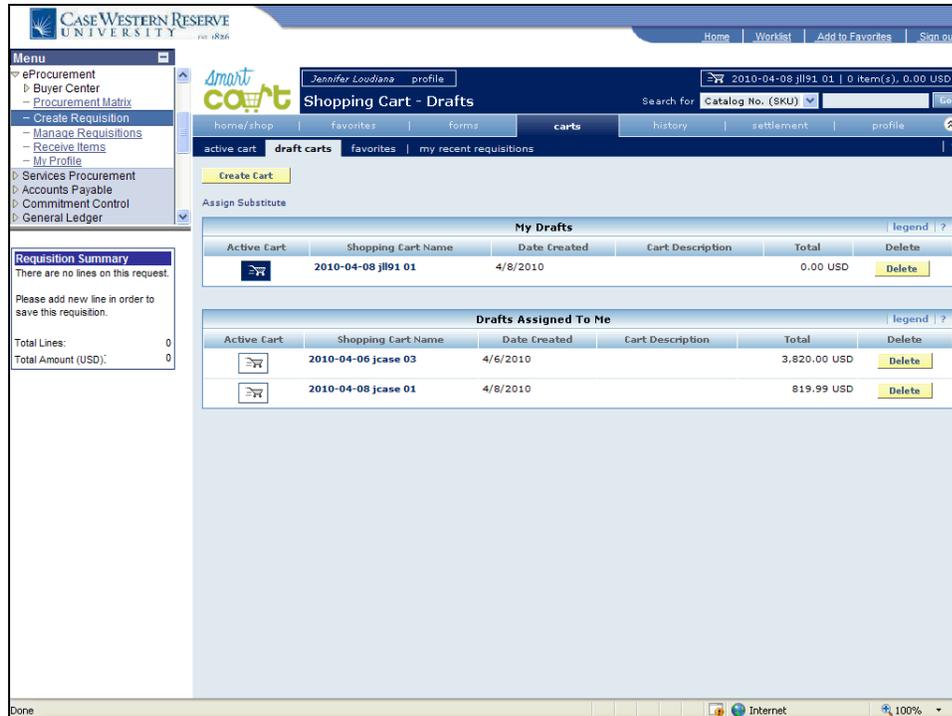
Step	Action
2.	<p>The email will be from <b>support@sciquest.com</b> with the subject of <b>A shopping cart has been assigned to you.</b></p> <p>Details will include the name of the Cart, who prepared the cart and who the approve is (yourself). the message will contain messages from the Window Shopper about the purchase and explain how to retrieve the cart.</p>



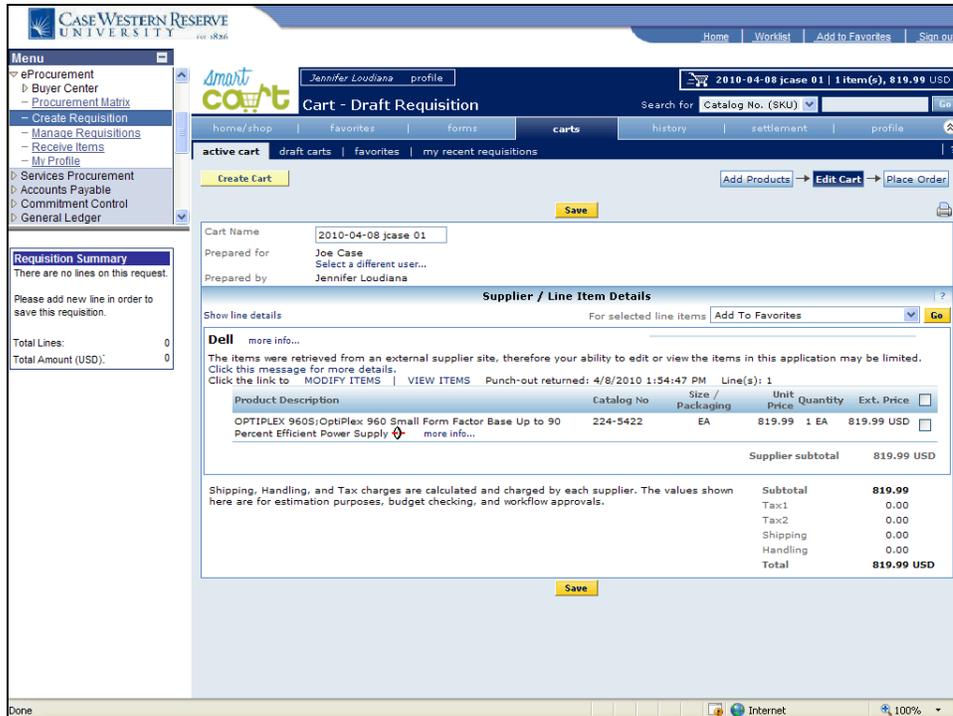
Step	Action
3.	Point to the <b>+ View Assigned Carts *</b> link. Follow the process to log into Financials and Create a Requisition. Navigate to the SmartCART home page.
4.	Click the <b>+ View Assigned Carts *</b> link to see the carts that were assigned to you. <span style="border: 1px solid black; padding: 2px;"><b>+ View Assigned Carts *</b></span>



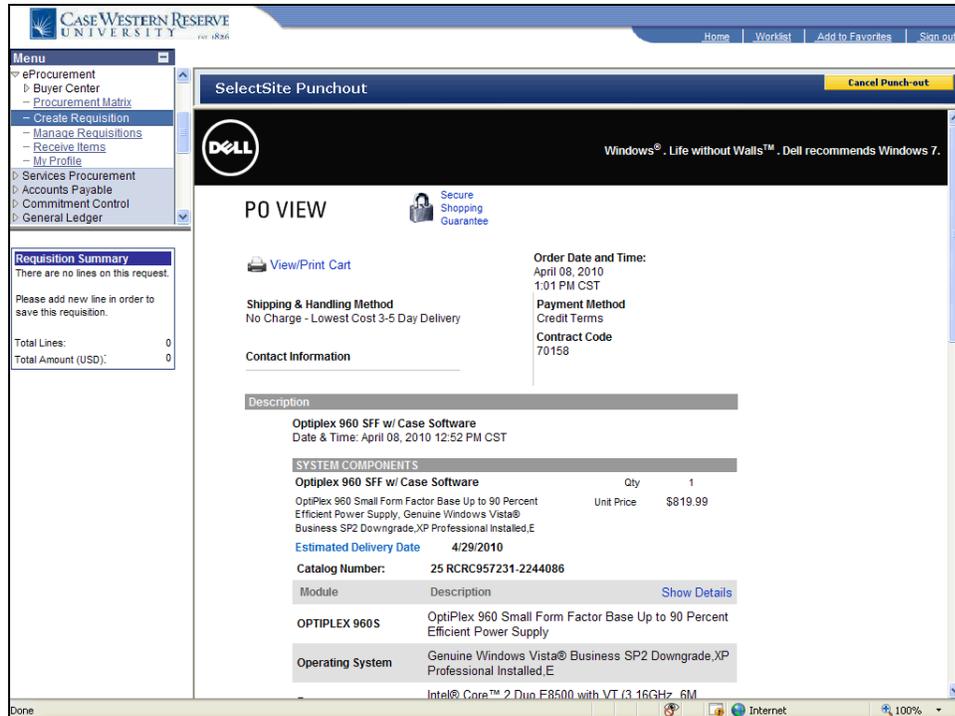
Step	Action
5.	Click the <b>Carts Assigned to me (2)</b> link. The number in parentheses, 2 in this example, indicates the number of carts that are to be approved. <span style="border: 1px solid blue; padding: 2px;">Carts Assigned to me (2)</span>



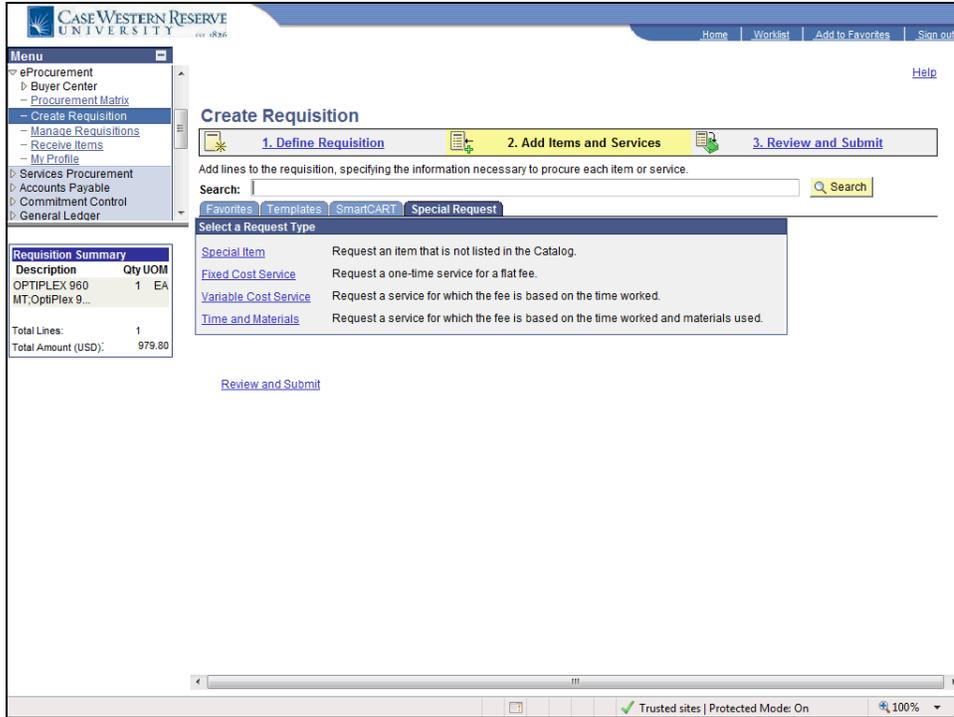
Step	Action
6.	The draft carts page appears. Notice there is a new section titled <b>Drafts Assigned to Me</b> . These are the carts from Window Shoppers waiting for approval.
7.	Click the name of the cart to be approved, in this example, <b>2010-04-08 jcase 01</b> .



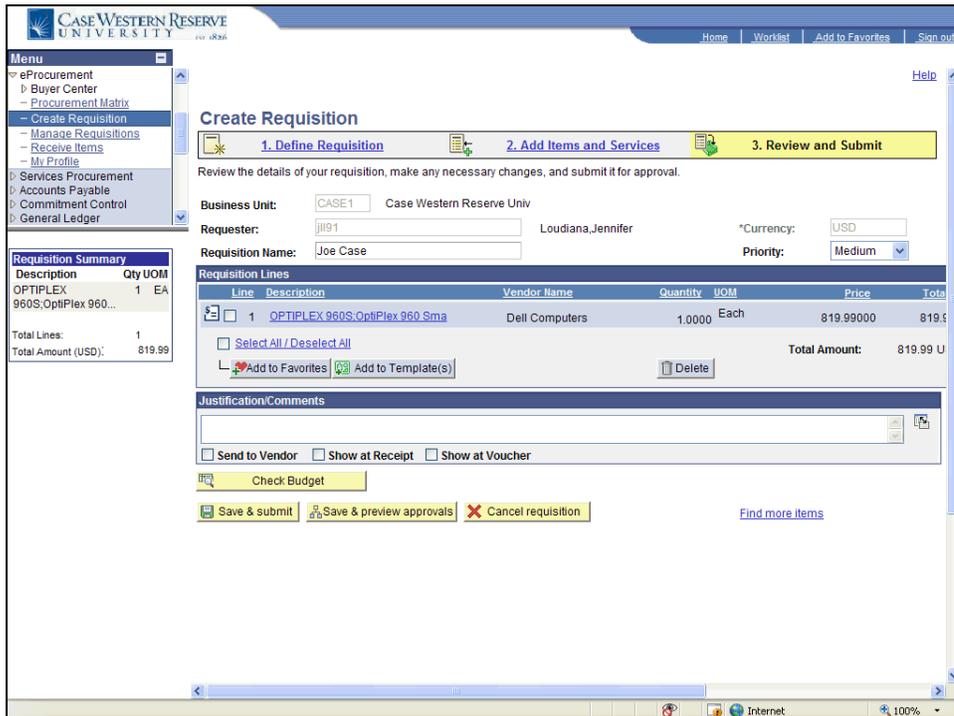
Step	Action
8.	<p>The cart will appear. Review the cart. In some cases a Modify Items and/or View Items option will appear above the item. This is dependent on the vendor and type of catalog that was used to place the order.</p> <p>For our example, click <b>VIEW ITEMS</b> to see the details about the purchase. Click the <b>VIEW ITEMS</b> link.</p> <p><a href="#">MODIFY ITEMS</a>   <a href="#">VIEW ITEMS</a></p>
9.	<p>The example vendor is a punchout so the system is going to the vendor website.</p>



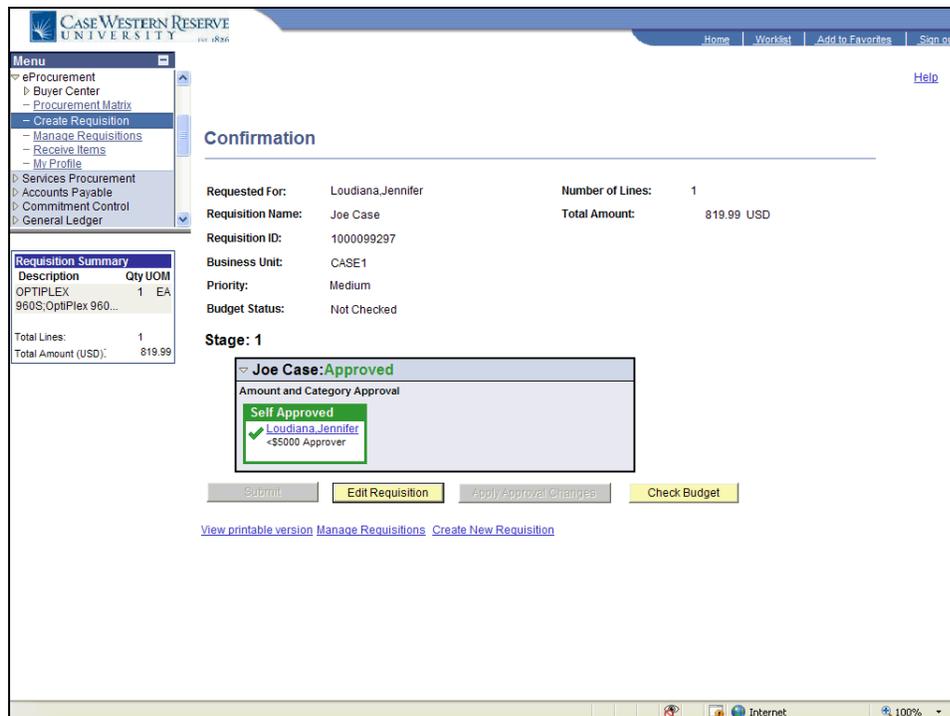
Step	Action
10.	The website page with the order and summary will appear. From this page you may <b>view/print</b> the cart. Point to the <b>View/Print Cart</b> link.
11.	No changes are needed, to return to the SmartCART, click the <b>Cancel Punch-out</b> button in the top right of the page. 
12.	Return to the SmartCART cart. The Approver should change the Cart Name if the Window Shopper did not. See "Best Practices appendix" in the SmartCART manual"
13.	After reviewing the cart and order, if ready to proceed, click the <b>Place Order</b> link. NOTE: This is the best time to edit the order. See "Appendix on Best Practices" in the SmartCART Manual. 



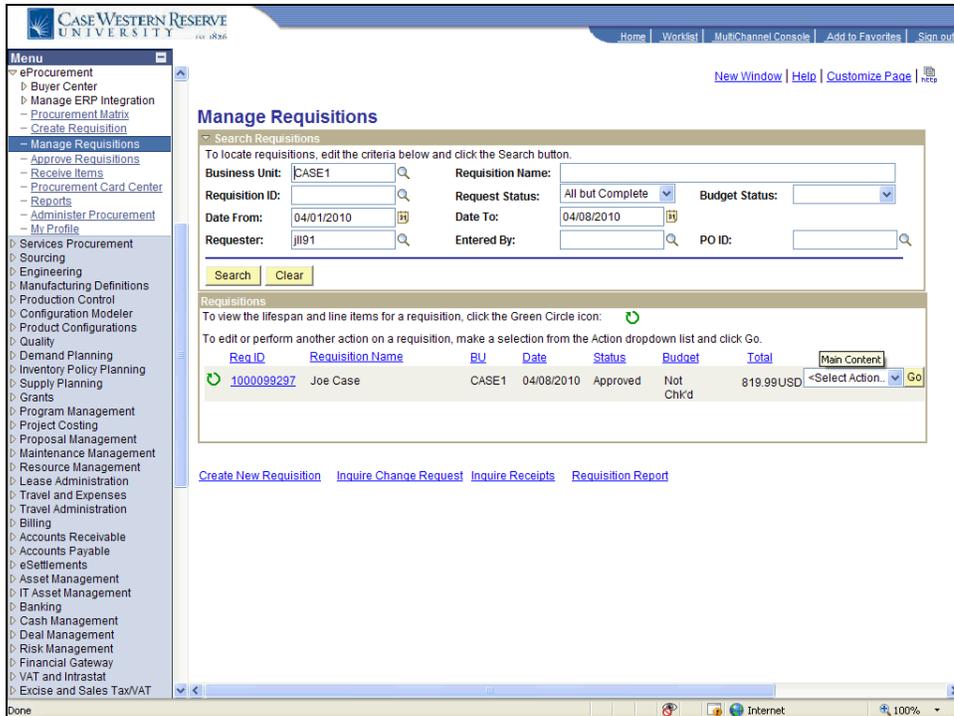
Step	Action
14.	To submit the Requisition with your SmartCart order, Click the <b>3. Review and Submit</b> link.



Step	Action
15.	The Requisition screen appears. Click the <b>Expand Section</b> for each item to proceed to enter Speedtype and shipping details. 
16.	Enter the desired information into the <b>Speed Type</b> field. Enter " <b>OPR261221</b> ".
17.	Click the <b>Save &amp; submit</b> button.



Step	Action
18.	The Requisition Confirmation page appears. Note the item is approved. A Purchase Order will be generated. 
19.	To view the status of the Requisition, Click the <b>Manage Requisitions</b> link. 



Step	Action
20.	The <b>Joe Case</b> requisition is in the list of Requisitions and shows a status of Approved. The Purchase Order will be dispatched within 20 minutes of approval/submission.
21.	Use the Select Action dropdown to manage the requisition. However, editing a SmartCART requisition that has been approved is not possible. The PO process for SmartCART items runs about every 20 minutes. 
22.	The completes the section about approving and managing Window Shopper orders in SmartCART. <b>End of Procedure.</b>

## **Appendix: Best Practices using SmartCART**

### **Procedure**

SmartCART is an additional way to purchase items from vendors using eProcurement. This section lists some best practices when working with SmartCART purchases that will make your work easier and navigation through the history easier.

**Search Preference** - Set up your search to be able to find similar terms. Click Advanced Search in Shop at the Top -> Search preferences -> Make sure Similar terms box is checked. See "Using the SmartCART System" section in this manual for detailed screen shots and information on set up.

**Cart Name** - The Cart Name will default to today's date, your ID, and a number, for example 2010-04-07 TRNA001 01. This naming scheme can become problematic when you are working with multiple cart purchases in the same day as well as working with Window Shopper carts.

The Best Practice recommendation is that the name be changed to something meaningful regarding the items in the cart. For example, Joe Smith (purchasing for), or Summer 2010 lab supplies (location and term purchase), January 2010 Office supplies (regular purchase by month).

**Editing Items** - The ability to edit SmartCART carts is available anytime while you are in SmartCART.

The Best Practice recommendation is to edit and finalize the cart for purchase before clicking Place Order or Assign Cart. This allows the cart to stay in synch with your Requisition and Purchase Order. Modifications may be done in PeopleSoft Financials, however, keep in mind that the Requisition and the Cart may not be the same when you view them historically.

**Editing Assigned Carts from Window Shoppers** - The ability to edit Window Shopper carts is available.

The Best Practice recommendation is the same as when creating carts in SmartCART through eProcurement make sure to edit and finalize your carts in SmartCART. Approvers are able to delete and change quantities in Window Shopper carts.

**Ship To: locations** - Ship To locations will be in the system. Before doing purchasing in SmartCART check eProcurement to see that other locations for your department are there. These are locations you normally would enter in the Modify Shipping Address area for one time shipping. The location associated with your ID will be the same.

**How to check** - Log into PeopleSoft Financials -> Click eProcurement -> Click Manage Requisitions -> Choose any Requisition and Copy it -> Click the paper \$ icon to expand one of the items. Click the lookup icon (looking glass) next to the Ship To: box to see the list and descriptions of locations. To view the additional department locations, search for the building, they will be coded by building and room. When finished, Cancel this requisition.

Step	Action
1.	<b>End of Procedure.</b>

## **Appendix: Processing Returns from SmartCART orders**

SmartCART has changed the return process for items. Contact the vendor Customer Service to process returns. Contact Procurement & Distribution for more details at 368-2560 or [smartcart@case.edu](mailto:smartcart@case.edu)

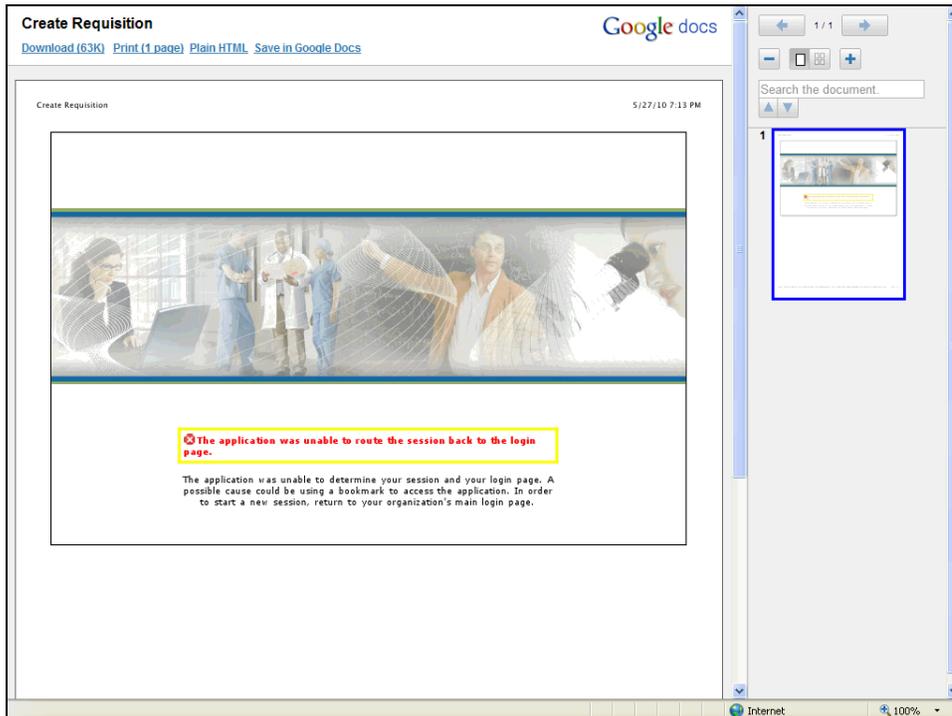
### **Procedure**

SmartCART has changed the return process for items. Contact the vendor Customer Service to process returns. Contact Procurement & Distribution for more details at 368-2560 or [smartcart@case.edu](mailto:smartcart@case.edu)

## Appendix: Mac OS X and Safari 4 using SmartCART

### Procedure

This document describes how eliminate the error "This application was unable to route the session back to the login".



Step	Action
1.	If you receive this error after clicking on the SmartCART link from the Financials system, follow these steps to remedy the issue.
2.	Go to the Safari <b>Menu</b> . Click <b>Preferences</b> .
3.	Click the <b>Security</b> button.
4.	Check the radio button <b>Always</b> for the Accept cookies: section.
5.	Close the window. Close Safari, open and continue using SmartCART with Financials.
6.	<b>End of Procedure.</b>

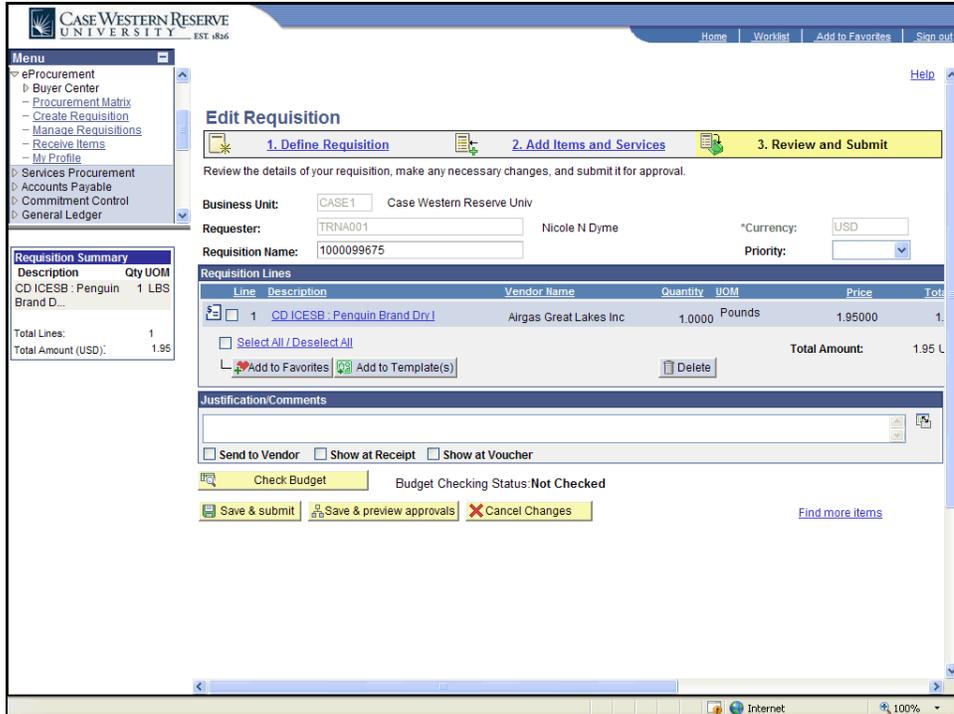
## Appendix: Airgas Shipping Information

### Procedure

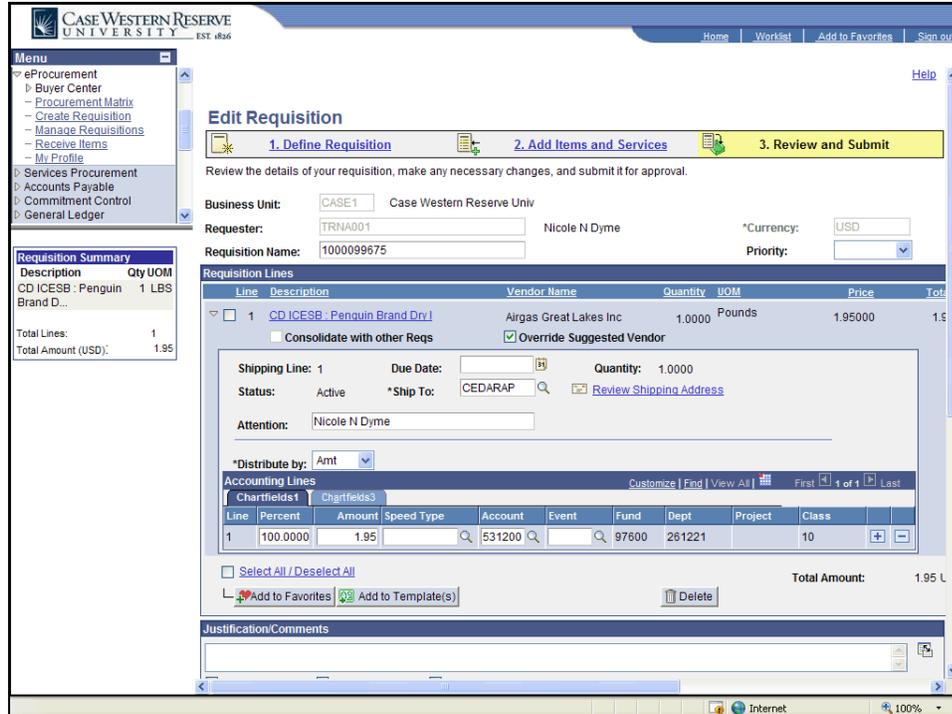
This document explains how to check and verify shipping addresses for Airgas deliveries that are ordered through SmartCART.

Start by navigating eProcurement -> Create a Requisition

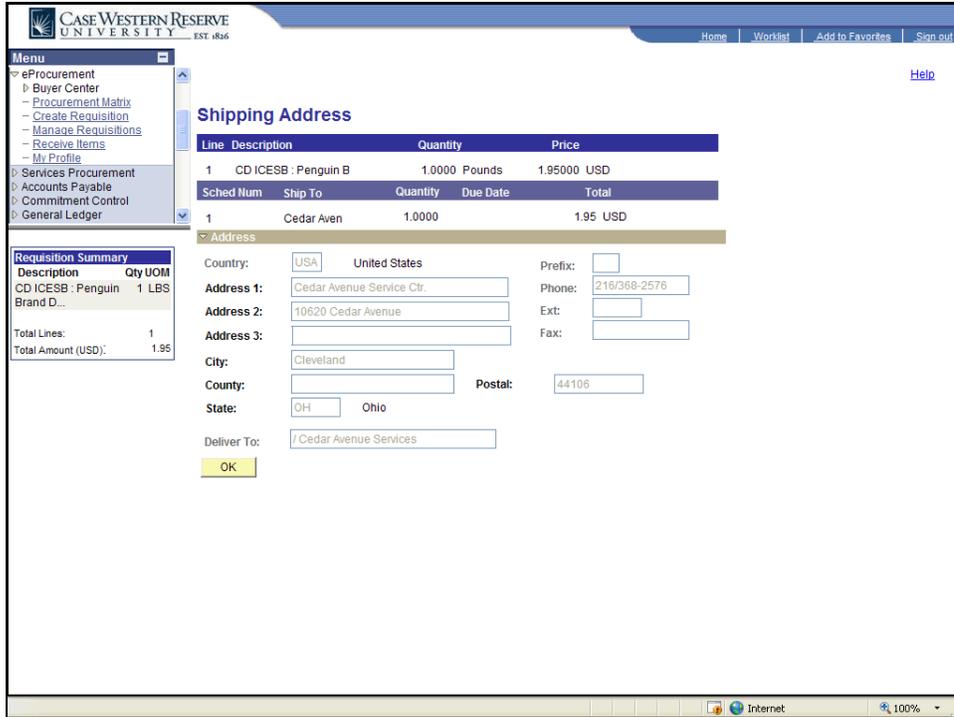
Step	Action
1.	Enter your Requisition Name and click the <b>2. Add Items and Services</b> link. <a href="#">2. Add Items and Services</a>
2.	Click the <b>SmartCART</b> tab. <a href="#">SmartCART</a>
3.	Click the <b>SmartCART</b> link. <a href="#">SmartCART</a>
4.	Continue to the SmartCART Home page and buy the items from Airgas. When ready to order, Click the Place Order button.  Details on How to use SmartCART are in the SmartCART and Window Shopper Manuals at <a href="http://www.case.edu/projects/erp/learning/finguides.html">http://www.case.edu/projects/erp/learning/finguides.html</a>
5.	After you have Placed the Order in SmartCART you are returned to Financials.  Click the <b>3. Review and Submit</b> link. <a href="#">3. Review and Submit</a>



Step	Action
6.	Click the <b>Payment and Shipping</b> Icon. 



Step	Action
7.	To see the current address associated with the Ship To: code, Click the <b>Review Shipping Address</b> link.  <a href="#">Review Shipping Address</a>



**Shipping Address**

Line	Description	Quantity	Price
1	CD ICESB : Penguin B	1.0000 Pounds	1.95000 USD

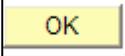
Sched Num	Ship To	Quantity	Due Date	Total
1	Cedar Aven	1.0000		1.95 USD

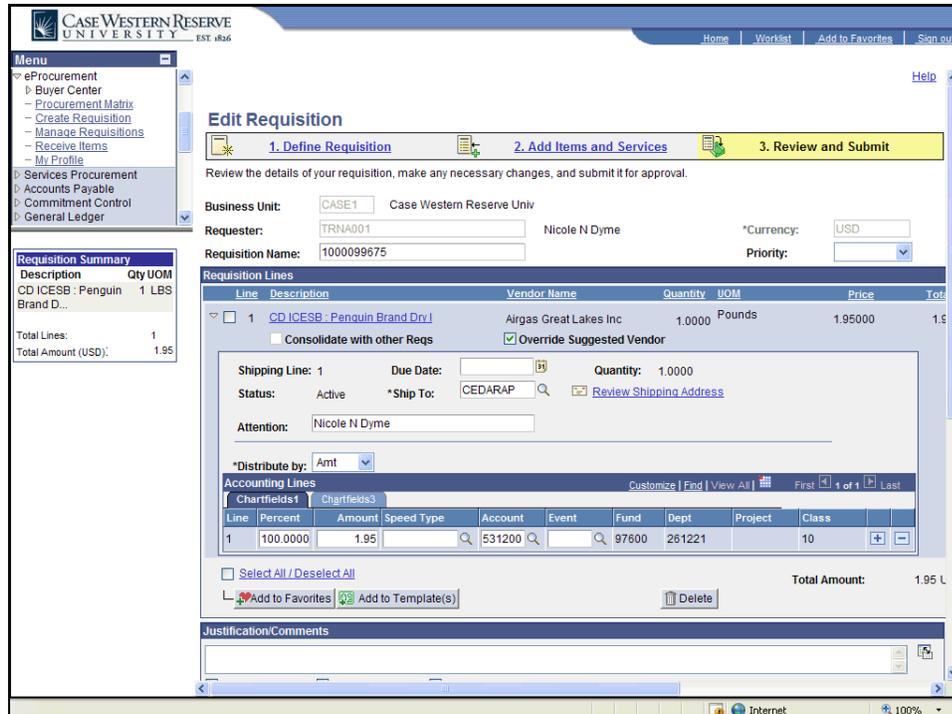
**Requisition Summary**

Description	Qty	UOM
CD ICESB : Penguin B	1	LBS

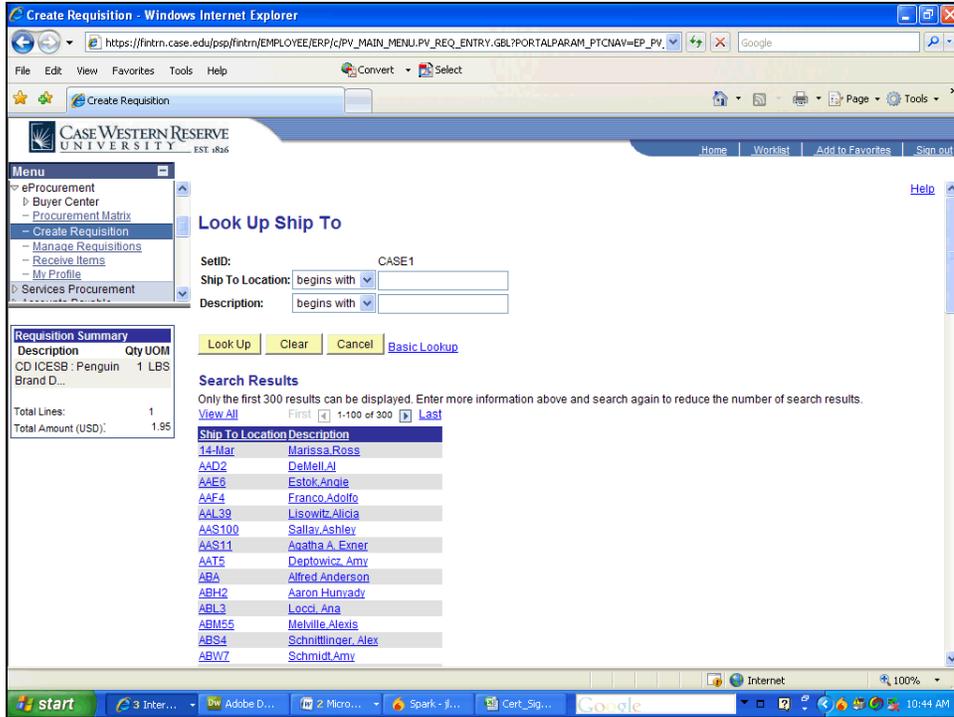
Total Lines: 1  
Total Amount (USD): 1.95

Country:  United States Prefix:   
 Address 1:  Phone:   
 Address 2:  Ext:   
 Address 3:   
 City:   
 County:  Postal:   
 State:  Ohio  
 Deliver To:

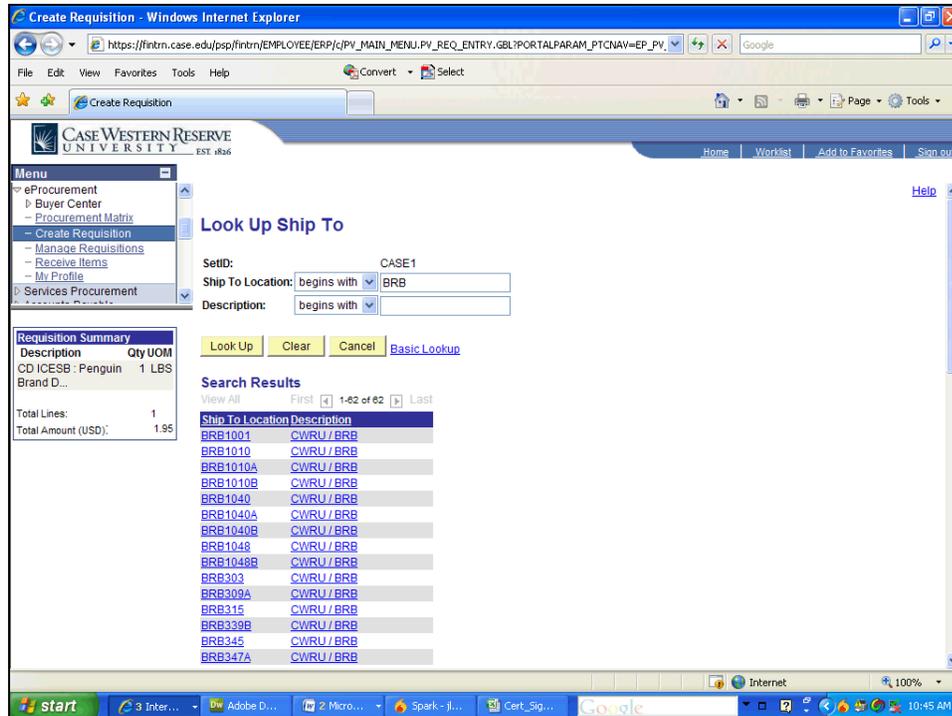
Step	Action
8.	<p>Review the Address information. If the address is <b>incorrect</b>, fill out this form to update the information  <a href="https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dkJBT0M3eTgxQVV1TGc6MQ&amp;AuthEventSource=SSO">https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dkJBT0M3eTgxQVV1TGc6MQ&amp;AuthEventSource=SSO</a></p> <p>Click the <b>OK</b> button to return to the requisition.</p> 



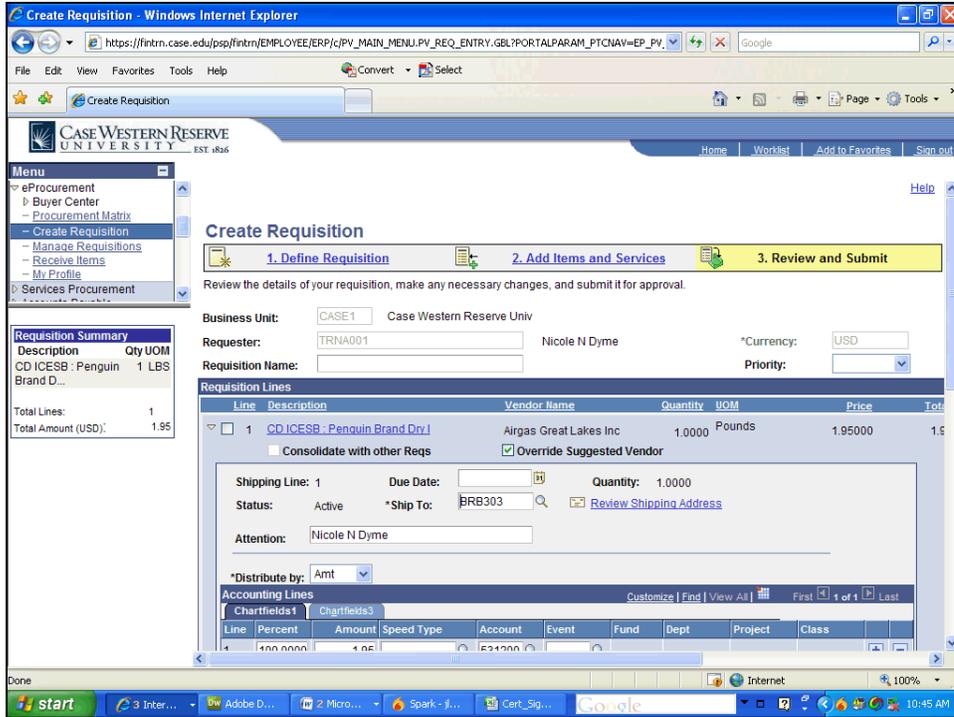
Step	Action
9.	<p>If you want to <b>change</b> the location your order will be shipped to, click the <b>look up icon</b>.</p> 



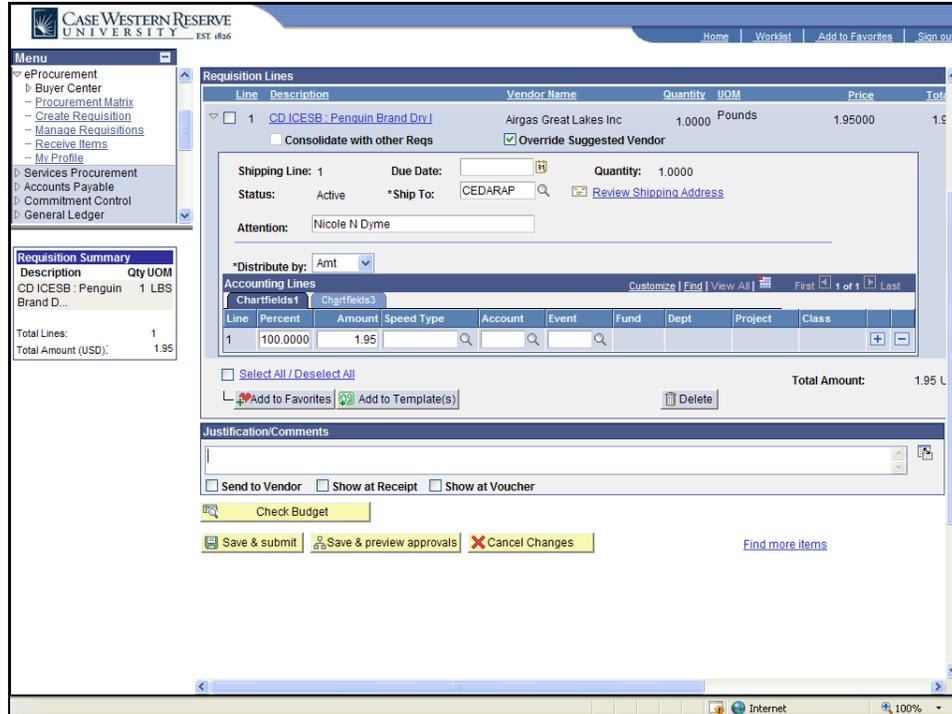
Step	Action
10.	<p>The Look Up Ship To page appears.</p> <p>Enter the location you want to search in the <b>Ship To Location</b> field. Use the "begins with" or "contains" dropdown to help with your search, for example if you are not sure of the building code, use contains.</p>
11.	<p>Click the <b>Look Up</b> button.</p> 



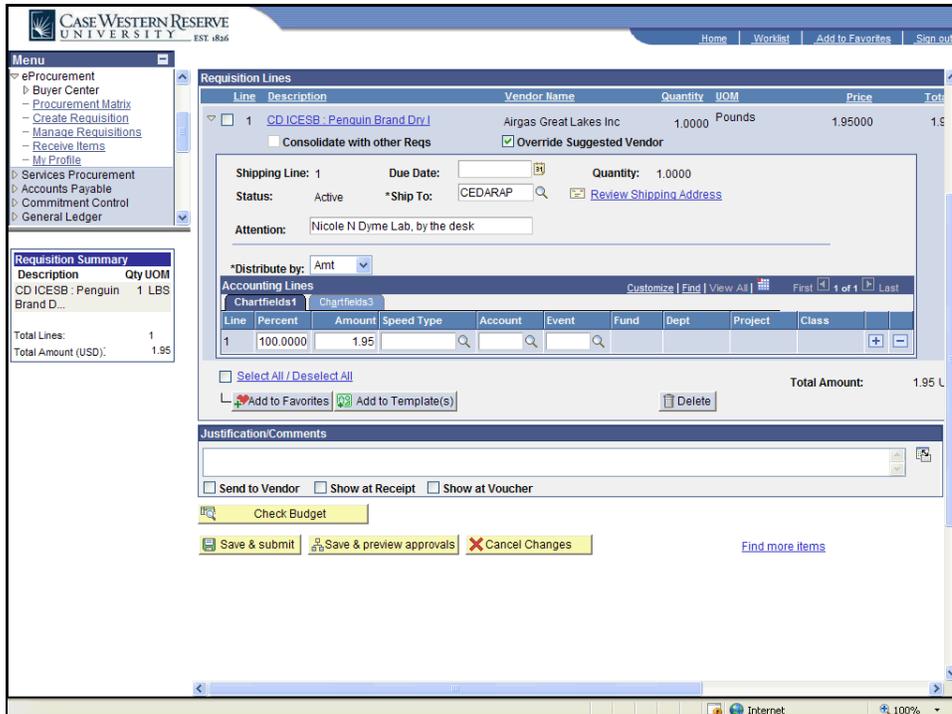
Step	Action
12.	<p>A list of locations that match your search will appear. Click the link of the location and room you want to ship your items.</p> <p><a href="#">BRB303</a></p>



Step	Action
13.	<p>The location is now in the Ship To field. To double check click the <b>Review Shipping Address</b> link to verify.</p> <p>Proceed to enter your Speedtype and submit the requisition.</p>



Step	Action
14.	<p><b>Comments entered in the Justification/Comments section, will not be seen by the Vendor!</b> This comments field should not be used for SmartCART orders to communicate with the vendor.</p>



Step	Action
15.	<p>Use the <b>Attention:</b> field to change the name to the correct person receiving the items.</p> <p>If you are using a generic building and room number, we recommend that you use this field for your name and any clarifying remarks that you would typically provide the Airgas team. <b>The field is limited to 30 characters.</b></p>
16.	<p>Click the <b>Save &amp; Submit</b> button to process your requisition and order.</p>
17.	<p>Additional Contact Information:</p> <p><b>General SmartCART inquiries:</b></p> <ul style="list-style-type: none"> <li>- By E-mail SmartCART@case.edu.</li> <li>- By Phone, Customer Care Team 368-2560.</li> </ul> <p><b>Airgas Assistance:</b></p> <ul style="list-style-type: none"> <li>- By E-mail airgas@case.edu.</li> <li>- By Phone,</li> </ul> <p><b>Ship-to Location Assistance:</b></p> <ul style="list-style-type: none"> <li>- By E-mail cwrushipto@case.edu</li> </ul> <p>To request an addition or modification complete this form:  <a href="https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dkJBT0M3eTgxQVV1TGc6MQ&amp;AuthEventSource=SSO">https://spreadsheets.google.com/a/case.edu/viewform?formkey=dEFYOGF6dko3dkJBT0M3eTgxQVV1TGc6MQ&amp;AuthEventSource=SSO</a></p> <p><b>End of Procedure.</b></p>

