

# The Checkout Process - Submitting Requisitions

## Overview

After completing all shopping, the checkout process begins. The complexity and steps involved in checking out varies per organization and per user. Generally, the following steps may be involved, but keep in mind that this will be different for each organization.

1. **Submit Cart** - After completing all shopping, users begin the checkout process by submitting their cart. If your organization manages requisitions through the application, users can click **Assign Cart** to send to another user for review, or they can click **Proceed to Checkout** to begin the checkout process.
2. **Complete Requisition** - A cart becomes a draft requisition at checkout, where additional information about the order is completed. A user can add or update various details on the order such as selecting the Ship To and Bill To addresses.

The activities and information required to complete and process a requisition are defined by your organization. Tabs on the requisition may allow users to view a summary of the order, view or edit shipping and handling information (as permissions allow), see a snapshot of what the PO will look like when processed, add comments or attachments, and review actions performed on the requisitions.

3. **Submit Requisition (Assign or Place Order)** - Once the requisition is ready to go, requisitioners can submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or be sent to an outside system for processing. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. **Note:** Checkout will not occur until all system errors are corrected.

## Summary Tab

Here are some of the types of information that may be displayed or required on a requisition on the **Summary** tab of a requisition:

- **General** - This is an overview of the order and displays general information about the requisition, such as the cart name, a description, and the Prepared By and Prepared For users. Some of these fields may be available on the General section:
  - **Cart Name** - Depending on your organization's setup, the system may automatically assign a unique name to a cart to identify it. Users may be able to edit the cart name if permissions allow. Once a requisition is submitted, this name becomes the Requisition Name. If using shared cart, only the shared cart owner can edit the Cart Name.
  - **Purchase Order (PO Number)** - The purchase order numbers associated with the requisition. Each PO number is a link to the purchase order document. Certain organizations may allow users to enter their own PO number in the cart; in other instances, PO number(s) are not available until the requisition is complete and a purchase order is created.
  - **Description** - Allows a user to add a brief description of the requisition.
  - **Prepared by** - Captures the name of the individual who created the requisition.
  - **Prepared for** - Allows a user to prepare the requisition for a different user. The field displays the name of the person who created the requisition by default, but users with the appropriate

permission can select an individual for whom they are preparing this requisition, if different from themselves. See [Place Orders on Behalf of Other Users](#) for more information.

- **PO Clauses** - PO Clauses represent special conditions the supplier should reference regarding the order. Orders can contain one or more PO Clauses. Clauses can be assigned to all orders by default, and be overridden on an order.
- **Shipping** contains information related to shipping and delivery for a requisition.
  - It displays the **Ship To** address, which is the address that the item will be shipped to by the supplier.
  - It may also include **delivery options**, where users can select delivery preferences such as the shipping carrier, shipping dates, or an Expedite checkbox that can be used to flag an item as a rush item.
- **Billing** contains information related to billing and payment for a requisition.
  - It displays the **Bill To** address, which is the address that the invoice will be sent to by the supplier.
  - It may also include credit card or payment information.
- **Accounting Codes** contains organizational accounting information that is captured with the requisition. Various codes used by an organization can be selected so that the purchase is billed to the proper financial source.
  - **Splits at the Header-Level and Line-Level** - Requisitions can be split between different account code custom fields at the header-level by a percentage of quantity or a percentage of price. At the line-level, account codes can be split by percentage of quantity or price, and also by amount of quantity or price. This allows users to assign specific amounts to different accounts or codes when creating or settling an order, rather than being limited only to percent of quantity or price. For instance, if a requisition subtotal is \$9000, and a given account has exactly \$4000 left in it, the order can be split with \$4000 applied to the limited account and \$5000 applied to another account, rather than calculating those exact amounts using percentages of the requisition subtotal.
- **Notes and Attachments** - This section displays notes and attachments added by the user. They can be internal notes and attachments, which are only visible to users within the application, or external notes and attachments, which are visible to both users in the application and to suppliers. Attachments added here are also available on the Attachments tab. Notes are only visible on the Summary tab.
  - **Internal Notes and Attachments** - Users can add notes or attach files to the requisition and they are available to approvers as the requisition goes through workflow. Internal notes and attachments are not visible to anyone outside of the organization (i.e., suppliers).
  - **External Notes and Attachments** - Contains external notes and attachments related to the requisition that are visible to individuals outside of the application, including suppliers. This section can contain a **Note to all Suppliers** field that allows users to add a detailed note to the requisition which is available to approvers and is sent on to suppliers with the PO. The note is sent with all POs that are generated from the requisition.

- **Additional Notes** (if configured for your organization) - An Additional Notes section is displayed on PRs and POs if configured for your organization. Users can add multiple notes to it, with a maximum of 1000 characters each. A maximum of 10 notes is recommended.
- **Items** - All items on the order are listed with detailed information about each item, i.e., the supplier, manufacturer number, quantity ordered, etc.

## Comments Tab

The **Comments** tab is used to add details or request information about a record. It provides a way for approvers and document owners to communicate internally about a document. Users can select who should be notified about the comment through an email notification. They can also add internal attachments to the record from this tab.

Click **+** to add a comment, click **↩** to reply to a comment, or click **🗑** to remove a comment. The number of comments included in the requisition appears on the tab. For example: Comments (1).

Comments added to purchase orders, receipts, or invoices associated with the requisition are also displayed here. Users can select an option from the **Show comments for** drop-down menu to filter for the comments added to specific documents.

In addition, comments that are added during the various actions listed below will also display on the Comments tab:

- Approve (when approving on behalf of another approver)
- Reject entire PR (within workflow)
- Reject Line Item(s)
- Draft Cart Assignment
- Assign
- Unassign
- Forward
- Place on Hold
- Expedite through workflow steps
- Unconsolidate a line item
- Bypass a workflow step
- Withdraw entire PR
- Withdraw line(s) on PR
- Return PR

## Attachments Tab

Attachments on a requisition can be managed in this tab as well as on the Summary tab. They can be internal attachments, which are only visible to users within the application, or external attachments, which are visible to both users in the application and to suppliers. Any changes made to attachments in this tab are also populated to the Summary tab.

The number of attachments included in the requisition appears on the tab. For example: Attachments (1).

To add an attachment, click **Add Internal Attachment** or **Add External Attachment** from the drop-down button in the top right corner of the panel. Click the actions icon \*\*\* next to an attachment to remove it, or to move it to the Internal Attachments or External Attachments section.

## History Tab


Displays a record of all changes made to the document. This is where you can see errors that have occurred and steps that have taken place to try to fix the errors.

## Populating Header Details

When creating a requisition, a user can add various details to the header information sections on the Summary tab. This provides users the ability to ensure that the requisition is handled appropriately.





Whenever possible, set up information about the requisition at the header-level and work by exception at the line-level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the "primary" code, then change the remaining 4.

**Note:** The sections and fields available at the header-level vary per organization.

1. Click the **Shopping Cart** button in the upper right corner to go to the active cart. (This step assumes you have one or more items in your shopping cart.)
2. Click the **Proceed to Checkout** button to enter the checkout process. The sections and fields displayed in the header will vary for each organization.
3. Complete header fields as needed. Click the edit  icon to enter or update fields in a section. Click the **Save** button to save the header information.
4. Once the header information is complete, update line item details as outlined in the section below.

## Populating Line Item Details

All items that are being purchased are listed on the **Summary** tab of a requisition, in the **Items** section, grouped by supplier. For the items that are being purchased, various details such as the ship to address, accounting codes, and commodity codes are associated with each line item.




Bulk Special Order paper	B-P83928	8.5 x 11 CS	80.00	1 CS	80.00	...	<input type="checkbox"/>
ITEM DETAILS    							
Contract:	<a href="#">PUR-OPBP-00194-2017</a>	Internal Note	<i>no value</i>				
Taxable	<input checked="" type="checkbox"/>	Internal Attachments	<a href="#">Add</a>				
Capital Expense	<input checked="" type="checkbox"/>	External Note	<i>no value</i>				
Commodity Code	<i>no value</i>	Attachments for supplier	<a href="#">Add</a>				
PO Clauses	<a href="#">Add</a>						

The information that is associated with a line item can come from different areas of the application. Some information associated with line items are populated from the header. For example, if accounting codes were selected at the header level, they are filtered down to the line level and applied to each line item. Other field values are based on organization setup or settings from a user's profile.





Users can modify the values – per line item – as needed, based on their user permissions and the application customization. This allows the user to ensure that each line item in the requisition has appropriate information associated with it. If field values on the header different for various line items, a note at the top of the requisition indicate that values vary by line.




### Tip on making changes at line-level

- Whenever possible, set up the information about the requisition at the header-level and work by exception at the line-level. For example, if you are using the same accounting code for 6 out of 10 of the line items, we recommend you enter the “primary” code on the header, then change the codes on the remaining 4 line items.
- If information on the header, such as the Ship To or Bill To address, or account code custom fields, is different on a line item, a **Copy to other lines** link appears next to the field in the header and you can click it to populate all line items with the header values.
- After populating custom fields for a line, you can copy this information to additional lines by selecting the copy to other lines option.

ACCOUNTING CODES						Values have been overridden for this line   
Project Code	Department	Cost Center	Location Number	Location Area 10	Budget Date Ranges	
10	DEV Development	1000 Research	<i>no value</i>	<i>no value</i>	2023-1 First Quarter	

## View or Edit Line Item Details

1. Open a requisition at checkout. You can go to your active shopping cart requisition by clicking the **Shopping Cart** button in the upper right corner and then clicking **Proceed to Checkout**.
2. Make sure you are on the **Summary** tab.
3. *(optional)* If you only want to view only items, click the filter icon  near the top right corner of the page and select **View Line Items Only**. Alternatively, you can collapse the header panels by clicking the  icon in the right corner of the appropriate panel.
4. Scroll down to the **Items** area of the screen. Requisition items are grouped by supplier in this section.
5. Choose one of these actions:
  - *View line item details* - Click the  icon next to **ITEM DETAILS** on a line item. It expands to show more information about the item, including the application data associated with the item, such as commodity codes. Most fields in this view are read-only.
  - *View product details* - Click on the **product name**. The Product Details window displays additional product information.
  - *View supplier information* - If you have the appropriate permissions, you can view supplier information by clicking on the **supplier name**.
  - *Make any changes to a line item* - Click the edit icon  near the top right corner of a line item. The Edit Line window opens and the fields that can be changed are editable. Change values as needed and click **Save**. **Note:** Commodity codes may be searched via a drop-down box or by selecting from a list, depending on your organization's configuration. If a commodity code contains only one value, that value will be automatically populated.
  - *Override information populated from the requisition header* - Some field values on line items are populated from the header. For example, if accounting codes were selected at the header level, they are filtered down to the line level and applied to each line item. If a line item needs to have a different value than the one on the header, you can override the header values at the line-level:
    - Click the actions icon **\*\*\*** next to the line item and select an option underneath the **Override** menu, such as the Bill To or Ship To address, or Accounting Codes.
    - Make the required edits and save your changes.

The information that has been changed is displayed on the line item underneath the ITEM DETAILS section, with a message indicating that "Values have been overridden for this line". Click the copy line icon  to copy the values that have been changed on this line to other lines, click the edit icon  to change the value, or click the remove icon  to delete the values applied to the line item and return to the values populated from the header.

## PO Clauses


PO Clauses represent special conditions the supplier should reference regarding an order. Orders can contain one or more PO clauses, and they can appear at the header-level, line-level, and supplier-level on documents. They can be populated in these ways:

- PO clauses can be added to a document by default based on organization settings.
- They can automatically be added by the system based on an active PO clause rule.
- Users with the appropriate permission can manually add PO clauses to a document.

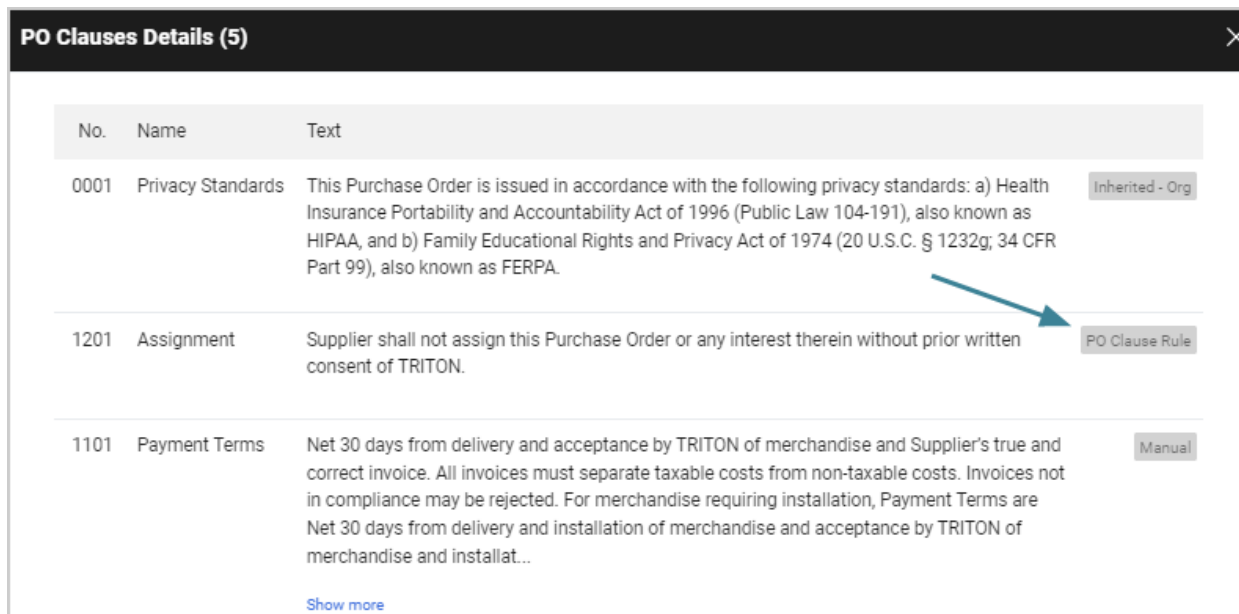
## View PO Clauses

To view PO clauses, locate a **PO Clauses** field. Click the **View details** link (at the header or supplier level), or the **Add/View** link (at the line-level).



**Note:** On requisitions, an information icon  indicates that the clause count in this field may not include clauses that may be applied due to clause rules.

Clauses added by organization default settings are listed first, then PO clauses added by a rule, followed by clauses that have been added manually.



No.	Name	Text	
0001	Privacy Standards	This Purchase Order is issued in accordance with the following privacy standards: a) Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), also known as HIPAA, and b) Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g; 34 CFR Part 99), also known as FERPA.	Inherited - Org
1201	Assignment	Supplier shall not assign this Purchase Order or any interest therein without prior written consent of TRITON.	PO Clause Rule
1101	Payment Terms	Net 30 days from delivery and acceptance by TRITON of merchandise and Supplier's true and correct invoice. All invoices must separate taxable costs from non-taxable costs. Invoices not in compliance may be rejected. For merchandise requiring installation, Payment Terms are Net 30 days from delivery and installation of merchandise and acceptance by TRITON of merchandise and installat...	Manual

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## Edit PO Clauses

Click the **Edit** link to add or remove a clause.

- *On requisitions*, PO clauses added by rules cannot be removed.
- *On purchase orders*, PO clauses added to a requisition can be edited by a permissioned user in the PO workflow. Clauses added by inheritance, rule or manually can be deselected and other clauses chosen on the PO. Once the PO is complete the clauses can be viewed and for a user with permission to edit

purchase orders, the clauses can be edited and any new revision created will reflect the changes in the PO clauses.


- *On change requests*, the PO clauses will not be editable at the header level. At the line level, the PO clauses can be edited. **Note:** The PO Clause rule engine will not rerun during the Create PO step even if the changes on the change request would trigger a rule.




Edit: PO Clauses (2)			
No.	Name	Text	<input type="checkbox"/>
1201	Assignment	Supplier shall not assign this Purchase Order or any interest therein without prior written consent of TRITON.	<input type="checkbox"/> PO Clause Rule
0001	Privacy Standards	This Purchase Order is issued in accordance with the following privacy standards: a) Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), also known as HIPAA, and b) Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g; 34 CFR Part 99), also known as FERPA.	<input checked="" type="checkbox"/>
101	Entire Agreement	This order is for the purchase and sale of goods and/or services described on this order and any attachments hereto. Acknowledgment hereof by Supplier, as set forth on page one herein to The Triton Organization (TRITON) shall constitute Supplier's acceptance of such order. In the absence of such acknowledgement, commencement of delivery of the goods and/or services and acceptance of s...	<input type="checkbox"/>


[Show more](#)

### Copy Account Codes to Other Lines

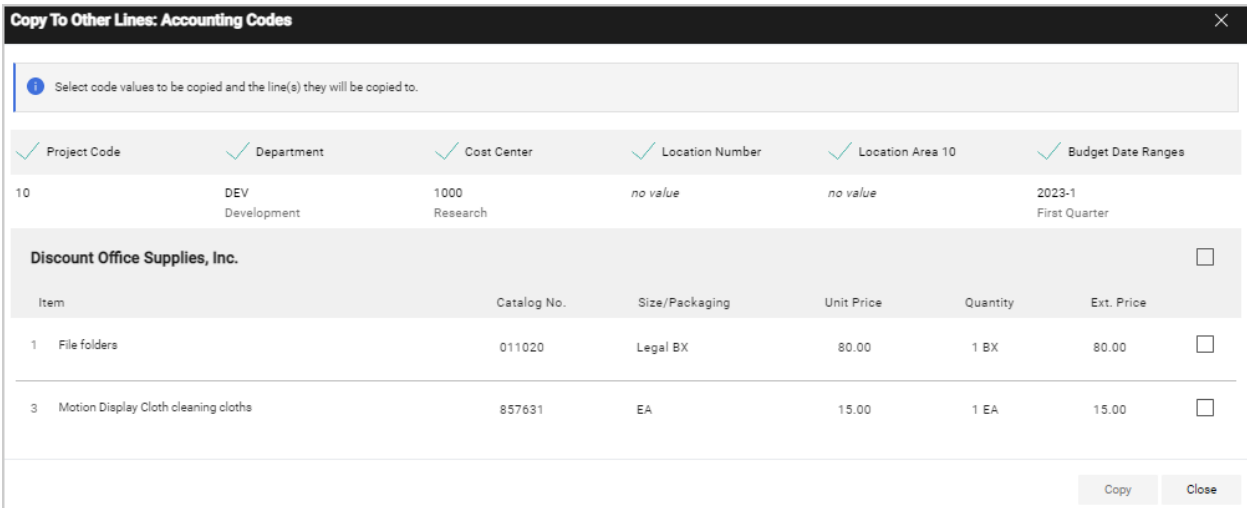
If account codes have been overridden on a line item in a cart, you can copy the account code selection to other lines on the cart, and choose which account code elements to copy from one line to other lines (or from the header to lines).

1. Go to a shopping cart with a multiple items.
2. Locate the **line item** with overridden account codes to copy account codes **FROM** and click the copy icon .

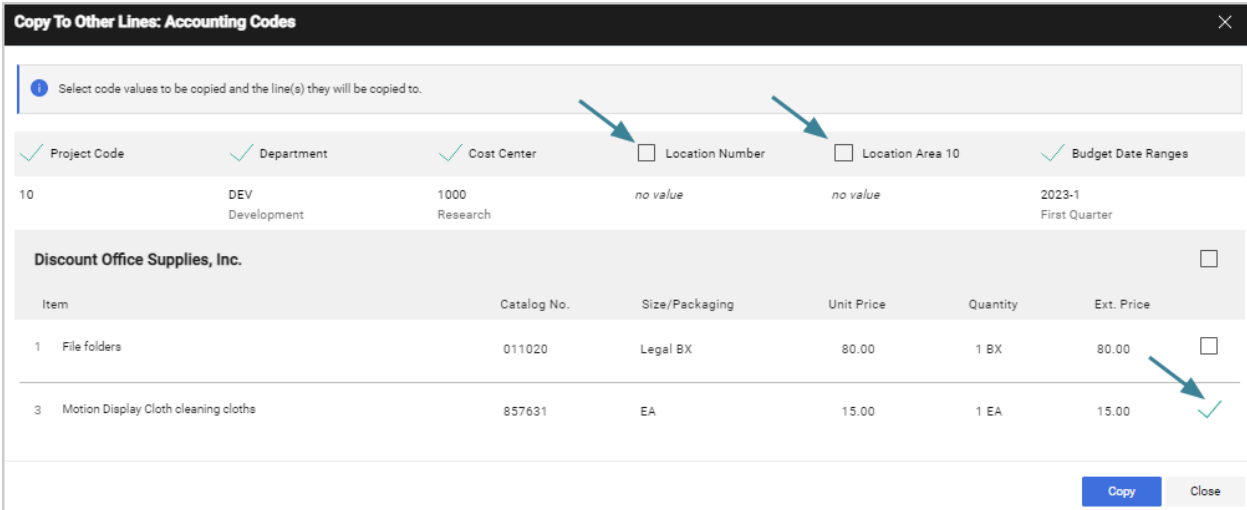
ACCOUNTING CODES						Values have been overridden for this line   
Project Code	Department	Cost Center	Location Number	Location Area 10	Budget Date Ranges	
10	DEV Development	1000 Research	no value	no value	2023-1 First Quarter	

3. The **Copy To Other Lines: Account Codes** overlay opens. Account codes from the source line are displayed in the top section and the lines they can be copied TO are displayed in the bottom section. All account codes are selected by default and a green check  is displayed next to them.





- In the top section of the overlay, users can **un-check** the account codes they *don't* want to copy by clicking the green checkmark next to it to de-select it. A blank checkbox is displayed next to the account code. If an account code has a blank checkbox next to it, it will not be copied. If it has a green checkmark next to it, it will be copied.
- In the bottom section of the overlay, users can **select the checkbox** next to each line that they want to copy the account codes **TO**.



- Click **Copy**. All the accounting codes selected from the source line are copied to the selected lines.

**Note:** The first time account codes are copied, an overlay will ask if you want to set the selection as your default. Select Yes if you want the same account codes to be selected each time you copy account codes, otherwise select No. If you select Yes, the overlay is only displayed again if your default account code selection is changed


Keep these things in mind when copying account codes:

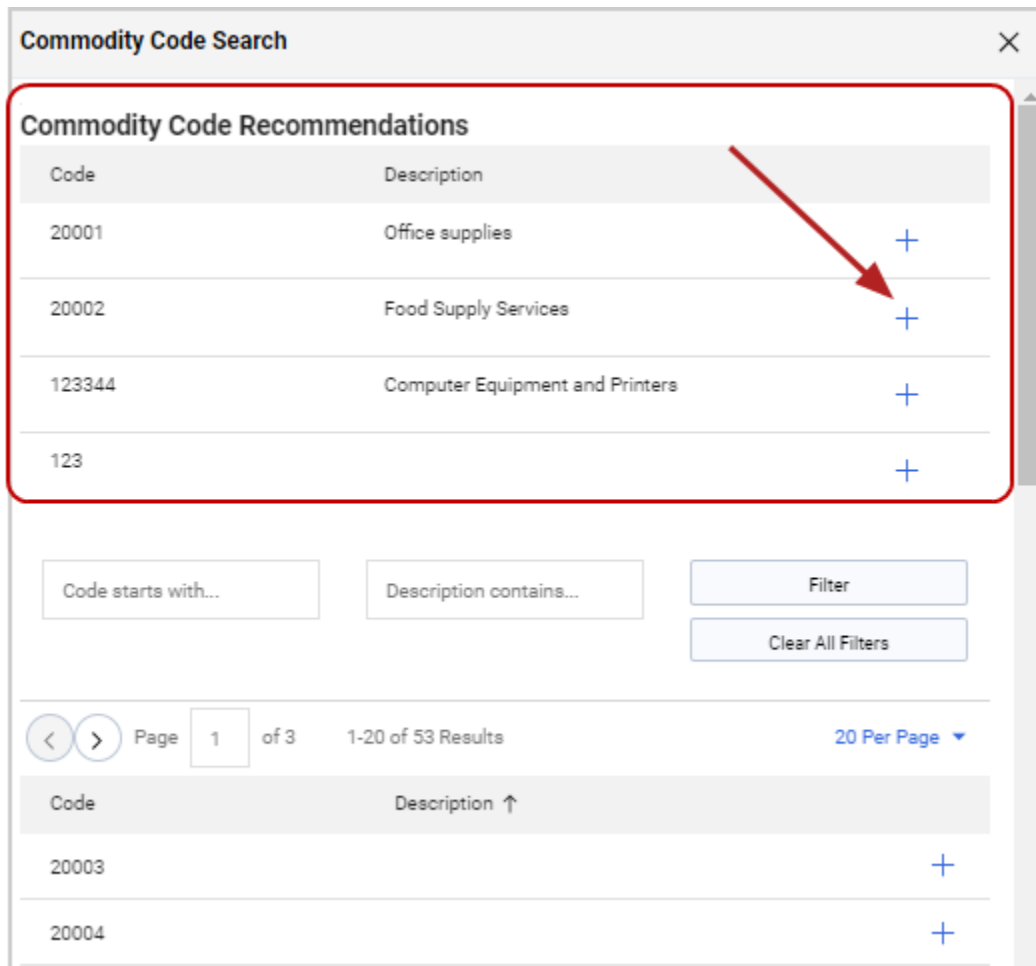
- The copy merges the selected account codes with those on the destination line (rather than overriding them). If a value is unchecked on the line of origin, the destination line will keep the value it already had for that code.
- The system will check parent/child relationships on account codes to ensure the relationships are maintained.

- If a user's selection is a child value, all parent and grandparent values are automatically selected.
- If the parent is unselected, any selected children of that parent are also automatically unselected.

### Select a Commodity Code Manually

Users have the option to reject the commodity code recommendations and perform a match manually using standard JAGGAER functionality.

- Click the magnifying glass icon  within the **Commodity Code** search box to access the familiar *Commodity Code Search* window where users can use pre-existing search functionality to locate and select a code.
- For users' convenience, Advise recommendations appear at the top of this page. Click a recommendation's + icon to select that commodity code.



Code	Description	
20001	Office supplies	+
20002	Food Supply Services	+
123344	Computer Equipment and Printers	+
123		+

Code starts with... Description contains... Filter Clear All Filters

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Code	Description ↑	
20003		+
20004		+

## Submit a Shopping Cart

The application validates the cart and checkout steps for proper completion of the requisition. Once the necessary steps are completed, the Assign Cart or Place Order button will be activated.

1. Click the **Shopping Cart** button in the upper right corner of the screen. The cart preview will display.
2. If you would like to review the cart before checking out click the **View My Cart** button. To proceed directly to checkout, click the **Checkout** button. The requisition will display.

**Note:** If a custom field is configured to trigger a real-time ERP validation, the shopping cart submission button will be labeled **Validate with ERP and Place Order**.

3. If there are any errors or additional information required before the cart can be submitted, that information will display at the top of the right sidebar. Fix these errors as necessary.
4. Submit the order:
  - If your organization has budget check configured, the **Check Budget** button displays. Click the button to see if your order is within the budget limit before placing your order.
  - If your organization manages requisitions through the application, the **Assign Cart** button displays. Click the button to assign the cart to an approver.
  - If your organization manages requisitions outside of the application, the **Place Order** button displays. Click the button to send the order.

Requisitioners can submit their orders or orders assigned to them by a system shopper. By submitting a requisition, the order may begin the approval process or be sent to an outside system for processing. Sometimes this means sending the order to an external ERP system, starting the approval process, or creating and delivering a PO to a supplier. **Note:** Checkout will not occur until all system errors are corrected.

## Review Cart Workflow

A visual representation of the workflow or approval process for a purchase requisition is provided. Each step in the process is listed and represents a manual approval step or an automated system step.

**Note:** If any required fields are not complete, an error displays at the top of the sidebar asking the user to fill in the required information. The user cannot proceed to the next step until all required information is provided.

**Suggestion:** Once the Purchase Requisition workflow is complete, a purchase order is created. Additional approval steps may be required for the purchase order before it is sent to the supplier.

1. Open a requisition at checkout. You can go to your active shopping cart requisition by clicking the **Shopping Cart** button in the upper right corner and then clicking **Proceed to Checkout**.
2. Complete all required information for the requisition.
3. View workflow:
  - a. The Purchase Requisition workflow is displayed under **What's next?** in the right-side panel. Expand or collapse the section using the **>** and **▼** icons.
  - b. In the Workflow section, users with the appropriate permissions can perform these actions:

- Click the actions icon \* \* \* next to **Workflow** to:
    - *View or print workflow steps* - Click **View Workflow** to view workflow steps. Click **Print approvals/workflow** to open a window that displays workflow steps with approval information with an option to download it in a printable format.
    - *Revert workflow steps*- Users with the appropriate permissions may also have the option to select **Revert workflow to a previous step** to return to a previous workflow step. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO. Enter a reason for reverting the step (required) and click **Revert**. The document returns to the selected workflow step and approvers on the step are notified that the document has been returned to them for approval. **Note:** If it is a parallel workflow step, the process needs to be repeated for *each* parallel step.
  - *Show skipped steps* - Slide the toggle next to **Show skipped steps** to display or hide workflow steps that will be skipped because they do not apply to this particular order.
  - *View approvers* - If a workflow step name is displayed in **blue**, click on the **step name** to view approvers assigned to a step. Click again to hide approver names.
  - *View additional information* - Click the actions icon \* \* \* next to a step and select **View Workflow Inspector** to view additional information about the workflow step. The Workflow Inspector shows if rules configured for the workflow step are triggered and it also displays the rule evaluation. Users with the appropriate permission can select **Expedite** to skip to a future workflow step.
- c. If there is a workflow step that requires an approver to be assigned to it, such as a financial approval step, a message at the top of the right-sidebar will indicate that an approver is required and it will contain a link that when clicked, will allow you to add or update the approver information.