

eShop How-To Sheets

Checking Out a Cart

This how-to sheet outlines the steps required to:

- Check out a cart that contains either goods or services
- What happens when check out a cart?
 - Once you click 'Submit Requisition' (step 6), the cart becomes a requisition with a requisition number.
 - It is the requisition that travels through the workflow on its way to becoming a purchase order.
 - The purchase order is sent to the vendor/ service provider (e.g. Staples) OR to Accounts Payable (e.g. cheque requisition form).

Tips:

- Do not add a form to a cart with goods (e.g. office supplies from staples) or other forms.
- Ensure you've chosen the correct address if you are shipping to your home (step 4a & 4b).

Last updated October 29, 2021

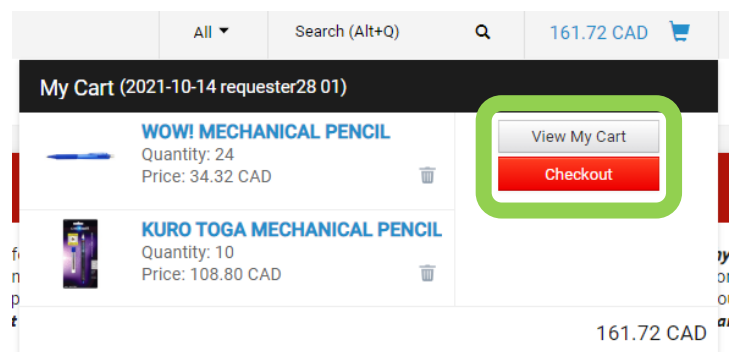
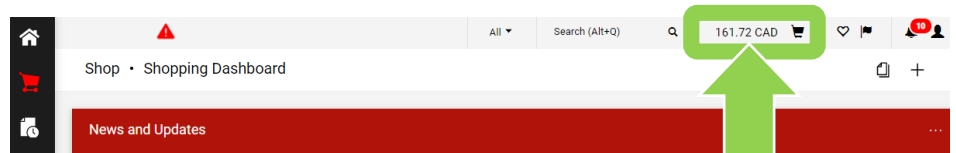
THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. You have already logged into eShop and have added items to a cart (e.g. goods, a form)
2. If you have a cart open and ready to checkout, skip to step 3.

To open the current cart, click on the amount beside the shopping cart icon.

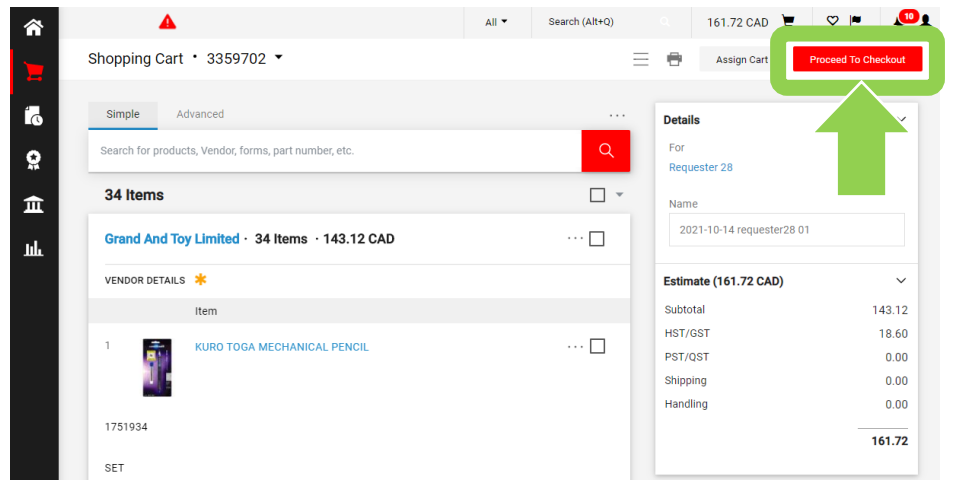
Tip: For certain types of forms, the amount beside the cart may be 0.

In the window that opens, click on the grey 'View My Cart' button to review your cart (Step 3) OR click on the red 'Checkout' button to proceed directly to the checkout page (Step 4).



3. If your cart is complete, click on the red 'Proceed to Checkout' button.

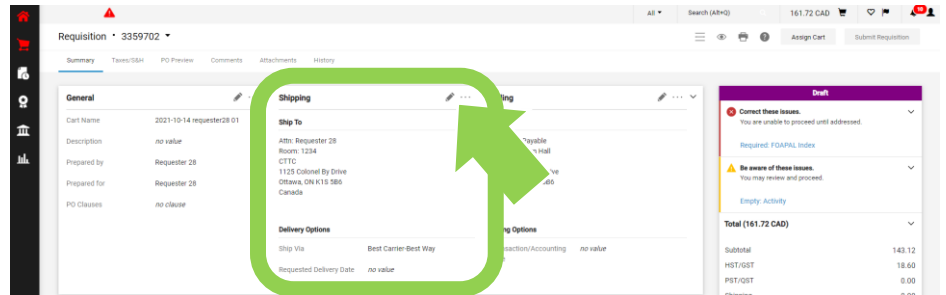
Tip: If your department would like your orders reviewed by 1 particular person within the department, they may request you assign the cart to them, instead of submitting it. Click on the grey 'Assign Cart' button in the upper right-hand corner of your screen to do this.



4a. Shipping address ...

On the checkout page, check that the shipping address is correct.

Click on the pencil icon to change the shipping address.

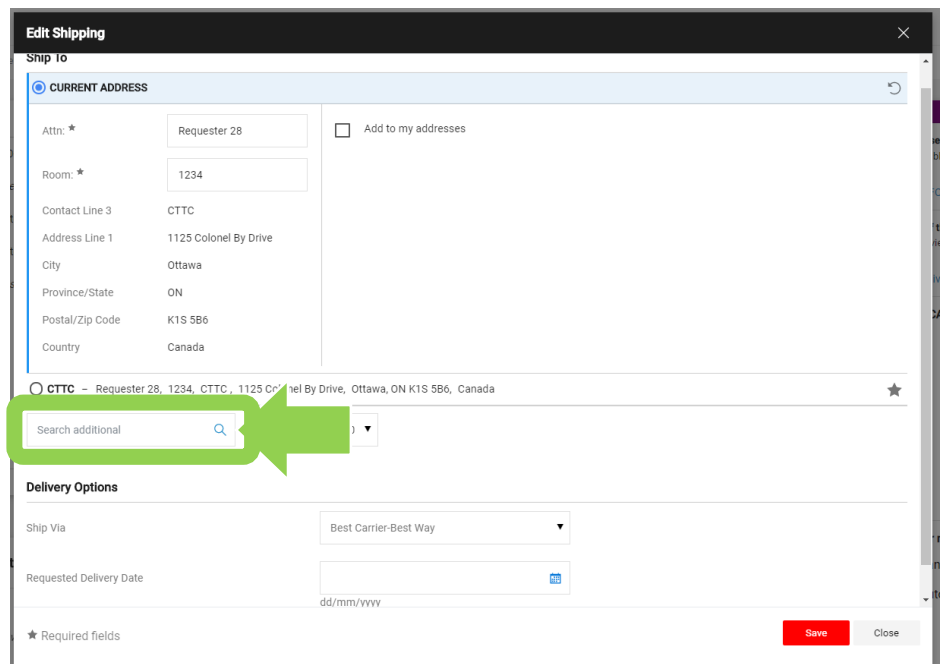


4b. Shipping address ...

In the 'Edit Shipping' window, type a building on campus into the 'Search additional' field to deliver to another location on campus OR type 'off campus' to deliver off campus.

Tip: Click on the magnifying glass to see a full list of the building on campus.

Follow the prompts to complete the new address.



5a. Expense funding ...

To confirm the expense funding (e.g. index), scroll down to the 'Expense Funding' section.

Click on the pencil icon to change elements of the expense funding line by line.

The screenshot shows a requisition for 'Grand And Toy Limited' with 40 items and a total value of 51.60 CAD. The 'Expense Funding' section is highlighted with a green box. It contains a table with columns: FOAPAL Index, Account, and Activity. The first row shows 'D498' (Finance Office - Name Change) under the 'FOAPAL Index' column, '710000' (Office Supplies) under the 'Account' column, and 'no value' under the 'Activity' column. A green arrow points to a pencil icon next to the 'Expense Funding' section header, indicating that it can be edited.

5b. Expense funding ...

In the window that opens, you can edit the 'Index', 'Account', and 'Activity' fields.

Click on the red 'Save' button to save your changes.

The screenshot shows the 'Expense Funding' edit window. It has three input fields: 'FOAPAL Index' (containing 'D498'), 'Account' (containing '710000'), and 'Activity' (containing 'no value'). A green box highlights these input fields. A red 'Save' button is located at the bottom right of the window, with a green arrow pointing to it.

6. Click on the red 'Submit Requisition' button in the upper right-hand corner to check the cart out.

The screenshot shows the requisition summary page for 'Requisition 3376959'. It has tabs for 'Summary', 'Tasks/SQL', 'PO Preview', 'Comments', 'Attachments', and 'History'. The 'Summary' tab is selected. At the bottom right, there is a red 'Submit Requisition' button, which is highlighted with a green box and a red arrow.

What next?

- Visit carleton.ca/facts/eshop to find more how-to sheets.
- Questions about the system? Email eshop@carleton.ca or call 613-520-2600 ext.3311.