



Shopper & Requisitioner

User Guide

Contents

Chapter 1: Accessing eShop	2
Chapter 2: My Profile	6
Chapter 3: Shopping eShop.....	13
Chapter 4: Filling Out eShop Forms	31
Chapter 5: Tracking and Searching Documents	43
Chapter 6: Receipting Your Purchase Order.....	48



Chapter 1: Accessing eShop

This section will cover:

- ✓ Accessing eShop
- ✓ Your Username and Password
- ✓ Access Management
- ✓ Roles
- ✓ Logging Out

Accessing eShop

The gateway to the eShop system can be found at carleton.ca/procurement/eshop. It can be accessed at any time, from anywhere, without the use of the Virtual Private Network (VPN).

Your Username and Password

To log in, you must supply your MyCarletonOne credentials.

- Enter your **USER NAME** and **PASSWORD**.
- Click the red **SIGN IN** button.



Carleton University

SIGN IN

Please enter your MyCarletonOne credentials in the fields below to sign in to the application.
Remember your password is case-sensitive. If you have forgotten your password, visit <https://myone.carleton.ca>.

User Name

Password

SIGN IN

If you cannot log in:

- The credentials you provided may be invalid, either because you entered the wrong user name/ password combination, or you have not signed up for MyCarletonOne. Visit <https://myone.carleton.ca> if you experience this issue.
- Anyone who has posting or signing authority on a funding source should have access. Email financial.systems@carleton.ca if you have questions.

NOTE: This system is DUO enabled (carleton.ca/its/duo).

carleton.ca/facts/eshop: 'Signing into eShop for the First Time: Profile & Default Address' how-to sheet

Access Management

You can request or update your funding source access through the Financial Access and Authority Management tool (FAAM) in Carleton Central. Visit carleton.ca/facts/faam for more information.

Roles

SHOPPER

- An individual who has access to shop the site, fill out forms, and assign their cart to a Requestor
- Currently granted manually by emailing eshop@carleton.ca

REQUESTOR (a.k.a. Requisitioner)

- An individual who has access to shop the site, fill out forms, and check out using funding sources for which they have posting or signing authority
- Automatically granted with financial access

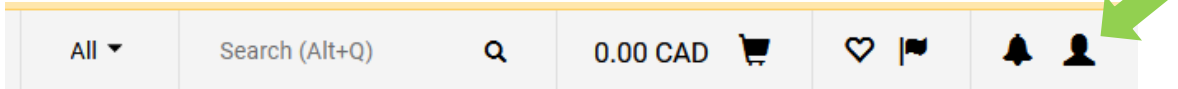
FINANCIAL APPROVAL / SIGNING AUTHORITY

- An individual who has access to shop the site, fill out forms, and check out using funding sources for which they are a signing authority
- Notified of approval items on funding sources for which they are a signing authority
- Automatically granted with financial access

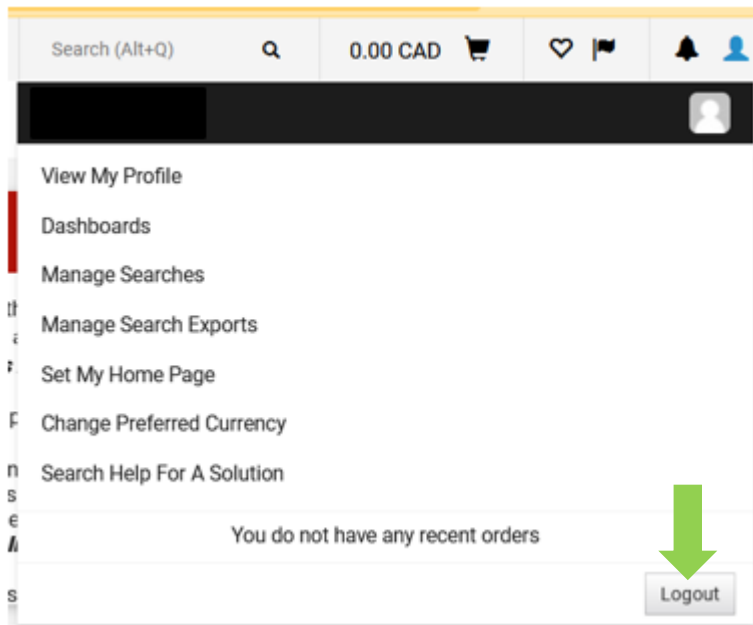
Logging Out

To exit eShop:

- Click on **THE PERSON ICON** in the upper right hand corner of your screen.



- From the drop down menu, click on the grey **LOGOUT** button.



Chapter 2: My Profile

This section will cover:

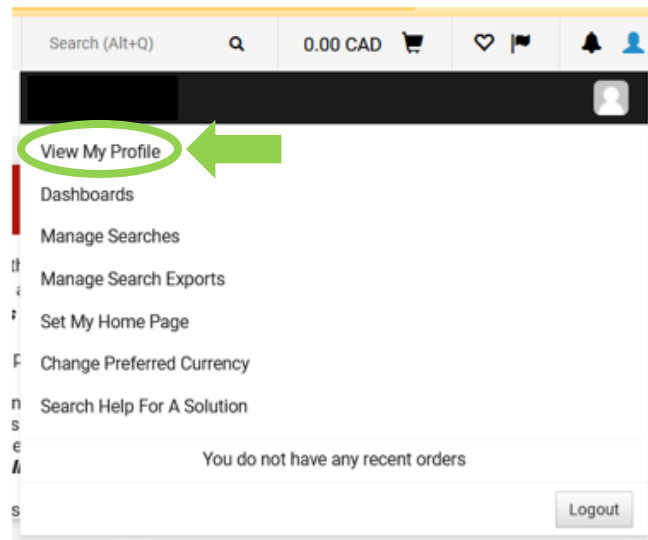
- ✓ Your Profile Components
- ✓ How to Update Key Profile Components

Your Profile Components

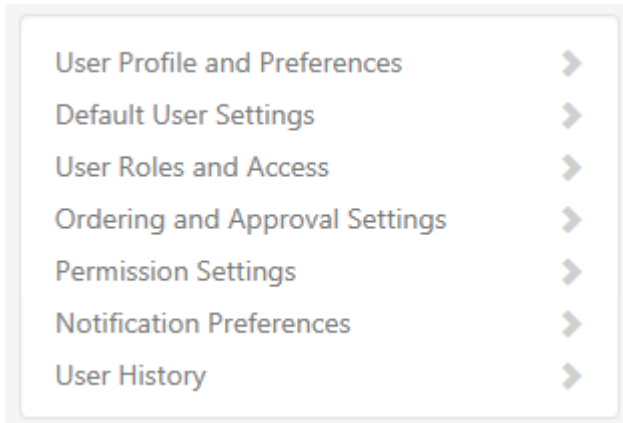
Each user has a unique profile. Your profile directs the eShop system on how to handle the documents you submit. You should check your profile the first time you log into eShop and anytime there are changes to your funding or reporting relationships.

To access your profile:

- Click on **THE PERSON ICON** in the upper right hand corner of the screen.
- In the new window that opens up, choose the **VIEW MY PROFILE** option.



- From the 'My Profile' page, the following profile component options are displayed.



How to Update Key Profile Components

These are the key components of your profile that you should review and customize.

User Profile and Preferences

User's Name, Phone Number, Email, etc.

Your name, phone number, email, etcetera have been pre-populated with information from your records at Carleton. Review the information to ensure that it is correct.

If there are any issues, please email us at eshop@carleton.ca.

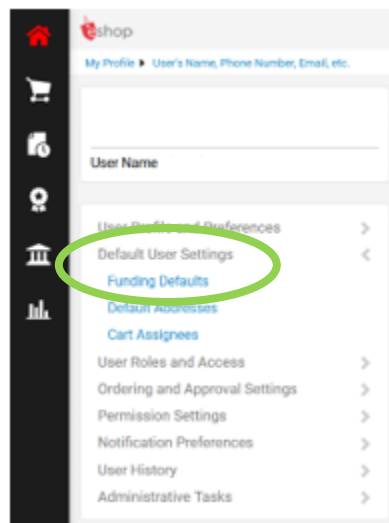
Default User Settings

Funding Defaults

Set a funding default if you have one funding source that you use most of the time. If you have many funding sources, it is best not to set a default.

To set the funding default that you use most often:

- Choose **DEFAULT USER SETTINGS** from the menu on the left.
- Choose **FUNDING DEFAULTS**.



- In the window that opens up, choose the **FUNDING CODES** tab.

Funding Defaults

Custom Field Name	Default Value	Description	Edit Values
-------------------	---------------	-------------	-------------

If you choose to set a funding default, **ONLY** set the 'FOAPAL index' funding default.

- To enter a default **FOAPAL INDEX**, choose the red **EDIT** button at the end of the 'FOAPAL index' line.

Custom Field Name	Default Value	Description	Edit Value
FOAPAL Index	D498	Finance Office	Edit
Account	No Default Value		Edit
Activity	No Default Value		Edit

- For index, choose from the list of indexes that you have access to.
- Once you choose the index, you have the option to save it as your default by clicking the box beside **DEFAULT**.
- Click on the red **SAVE** button.

Funding Defaults

Admin Use Only **Funding Codes** Funding Favorites Admin Use Only

Custom Field Name	Default Value	Description	Edit Values
Index	D498	Finance Office	Edit

Edit Values Close

Create New Value

Value	Description
188603	RENT: Rental of the Gallery Space
315774	Research
D498	Finance Office

* Custom Field Values marked with an asterisk are role-based values. Users can only modify the Default status of these Custom Field Values.

Edit Existing Value ?

Value

Description

Default ☒

Status active

Save Remove



While there are other options under 'Funding Defaults', this is the only one that we recommend that you set a default for.

carleton.ca/facts/eshop: 'Default Index and Activity Code Pick Lists' how-to sheet

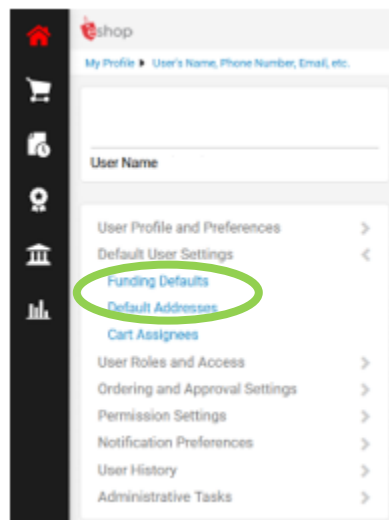
Default Addresses



Setting the default address will save you time with every transaction.

The address identifies where vendors should ship your order. To create default addresses:

- Choose **DEFAULT USER SETTINGS** from the menu on the left.
- Choose **DEFAULT ADDRESSES**.



- To make an existing shipping address your default, choose from the options under **SHIPPING ADDRESSES**.
- You have the option to save it as your default by clicking the box beside **DEFAULT**.
- Click on the red **SAVE** button.

Default Addresses

Ship To Bill To

Select an address to edit

Select Addresses for Profile Delete Address

Shipping Addresses

Off Campus

Robertson Hall

Tory Building

Edit Selected Address

Nickname Robertson Hall

Default ☒

Current Default Address Campus

ADDRESS

Attn:

Room: 603

Contact Line 3 Robertson Hall

Address Line 1 1125 Colonel By Drive

City Ottawa

Province/State ON

Postal/Zip Code K1S 5B6

Country Canada

Save

To create a new address:

- Click on the red **SELECT ADDRESSES FOR PROFILE** button.
- Choose a building on campus OR off campus from the drop down menu.

Default Addresses

Ship To Bill To

Select an address to edit

Shipping Addresses

Off Campus

Robertson Hall

Tory Building

Select Address Template

Select Address Template

Select Addresses for Profile

- If you choose 'Off Campus' you will have to enter the address.
- Don't forget to click on the red save button to save your changes.

Ship To Bill To

Select an address to edit

Select Addresses for Profile **Delete Address**

Edit Selected Address

Nickname Off Campus

Default ☐

Current Default Address Off Campus

ADDRESS

attn:

Phone: +1 (613) 520-2600

Address Line 1

City

Province/State

Postal/Zip Code

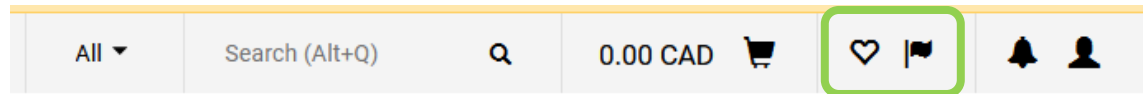
Country Canada

Save

carleton.ca/facts/eshop: 'Signing into eShop for the First Time: Profile & Default Address' how-to sheet

Notification Preferences

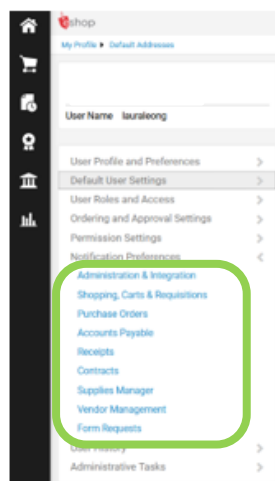
You will receive emails from eShop or notifications within eShop related to your purchases and actions that need to be taken. Notifications within eShop will be flagged in the upper right hand corner of the screen.



Notifications will be automatically set by the system; however, notification preferences allow you to adjust when and why you receive emails and notifications from eShop.

Editing your notification preferences

- Click on **THE PERSON ICON** in the upper right hand side of the screen.
- In the new window that opens up, choose the **VIEW MY PROFILE** option.
- Click on **NOTIFICATION PREFERENCES** in the menu on the left.
- From the blue notification preferences options that appear, determine which category and then the line item you would like to change, and click on the blue text (e.g. Shopping, Carts, & Requisitions)



- In the new window that opens, click on the blue **EDIT SELECTION** text.
- To change a notification, click on the radio button beside **OVERRIDE** and choose one of the following from the drop down menu: None, Email, Notification, Email & Notification.
- Click the red **SAVE CHANGES** button.

NOTE: Notifications associated with overdue goods receipts will be sent daily starting three days after receipt of an invoice.

Chapter 3: Shopping eShop

This section will cover:

- ✓ What to Expect from your eShop Shopping Experience
- ✓ Searching for Goods in eShop
- ✓ Shopping Hosted Catalogues
- ✓ Shopping Punchout Catalogues
- ✓ Shopping Level II Punchout Catalogues
- ✓ Shopping Live Pricing Catalogues
- ✓ Shopping Internal Vendors
- ✓ You Did Not Find the Catalogue You Were Looking For
- ✓ Checking Out

What to Expect from your eShop Shopping Experience

Typically, when we make an online purchase it is from one online company. eShop is a little different in that it brings together goods from many companies into one website.

Ideally, the shopping experience would be the same for each and every item in eShop. However, each company chooses how to display their goods. In eShop, a catalogue is simply the list of goods that a vendor has to offer.

The following types of catalogues tell you what to expect from your shopping experience:

HOSTED: The term 'hosted' tells me that a vendor has placed their catalogue into eShop, so my shopping experience will be like any other online shopping experience.

PUNCHOUT: Some vendors prefer to keep their catalogues on their own websites. When you select a punchout catalogue, you temporarily leave the eShop system to shop on a Carleton-specific section of the vendor's site.

The functionality of each punchout catalogue will vary. However, none of their goods will appear in an eShop search for goods.

LEVEL II PUNCHOUT: These catalogues offer a cross between a hosted and a punchout catalogue. Goods from these vendors will appear in searches, however, you will have to temporarily leave the eShop system to find pricing.

LIVE PRICING: Similar to the level II punchout catalogues, these catalogues bring in live pricing for items displayed in the search.

INTERNAL: Internal catalogues are also like any other online shopping experience. The term 'internal' tells me that this is an internal Carleton University vendor like The Print Shop. The functionality of each internal catalogue will vary.

Searching for Goods in eShop

Once logged into eShop, there are multiple ways to conduct a search for products.

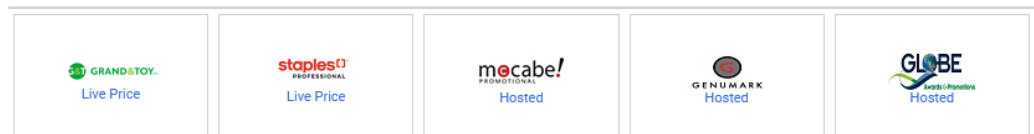
Vendor Stickers

When you arrive on the eShop landing page, your eye will likely be drawn to the vendor stickers that are being promoted. These stickers are organized into categories and are very useful if you know exactly which vendor that you want to buy from.

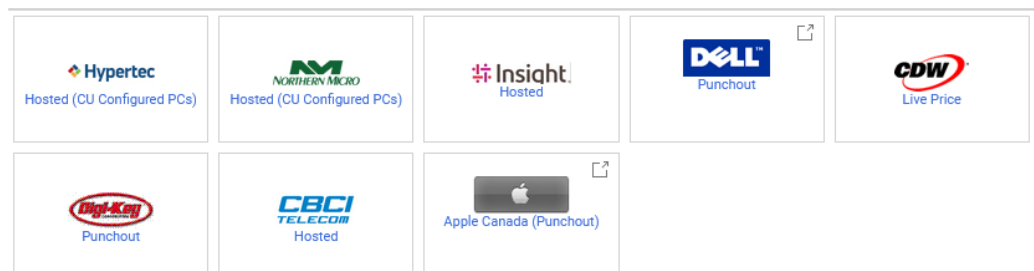
New and Noteworthy



Office Supplies & Promotional Merchandise



Electronics & Audio Visual

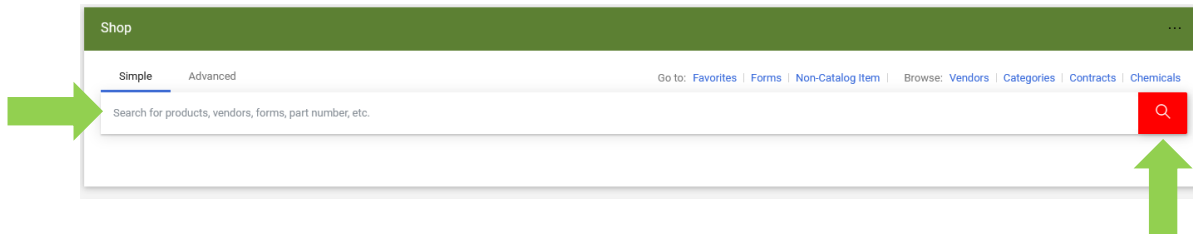


carleton.ca/facts/eshop: See step 3 of the 'Searching for Products & Saving your Favourites' how-to sheet for more information

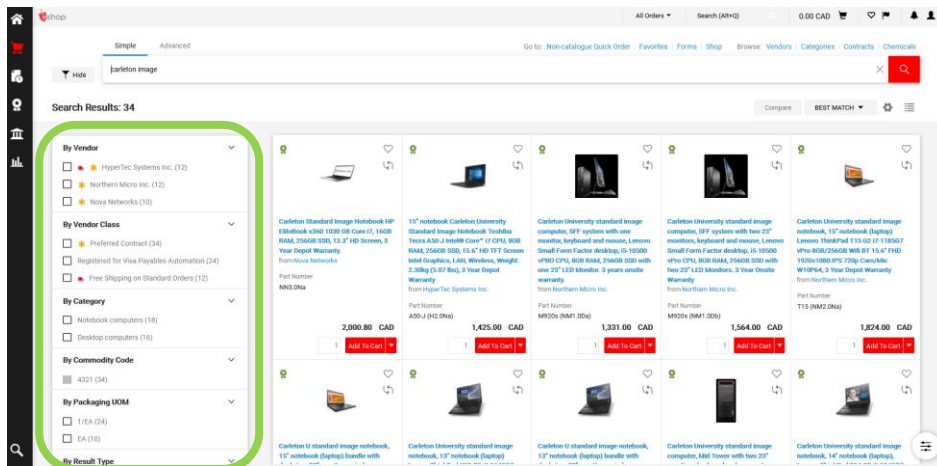
Simple Search

Use this simple search toolbar to search for goods directly from the eShop homepage:

- Type a good (e.g. pencil) into the search field and click the red **MAGNIFYING GLASS ICON** button.



There are a number of ways to refine search results. In this example, 'carleton image' was entered in the search field to search for a standard image laptop (i.e. standard configurations have ITS software images adapted to them and receive full support from ITS).



carleton.ca/facts/eshop: See step 2 of the 'Searching for Products & Saving your Favourites' how-to sheet for more information

Advanced Search

The advanced search window provides functionality to filter for specific criteria.

Shop

Simple

Advanced

Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | Browse: [Vendors](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Advanced Search

Find Results That Have:

All of These Words

Part Number (SKU)

Commodity Code

Vendor

Manufacturer Name

Other Options

Exact Phrase

Any of These Words

Custom Attributes

COVID-19

☐

WFH Approved

☐

Search

Reset

Quick Search Links

The quick links also filter for specific criteria.

Go to: [Favorites](#) | [Forms](#) | [Non-Catalog Item](#) | Browse: [Vendors](#) | [Categories](#) | [Contracts](#) | [Chemicals](#)

Page 16

Shopper and Requisitioner User Guide

Shopping Hosted Catalogues

The results from a search will yield a list of goods. Each option has the type of item, followed by the vendor's name. The price of the item, followed by the currency, will also be listed. The currency should always be C-A-D or Canadian funds.

Refining your Search

If your search does not yield the results that you are looking for, you may need to refine your search.

As an example, a broad search for mechanical pencils will return any good where the vendor has used the word 'mechanical pencil' in the description.

The screenshot shows the eShop interface with a search for 'mechanical pencils'. The search results are displayed in a grid format, showing various mechanical pencils from different vendors. The left sidebar contains filters for 'By Product Flag' and 'By Vendor'. The main content area shows a grid of product listings, each with an image, title, vendor, part number, price, and an 'Add To Cart' button.

Search Results: 145

By Product Flag

- ☐ Energy Star (1)
- ☐ Green (1)
- ☐ Recycled (1)

By Vendor

- ☐ CU Science Store (1)
- ☐ Grand And Toy Limited (60)
- ☐ Staples Professional Inc. (36)
- ☐ Fastenal (44)
- ☐ Acklands Grainger (4)

By Vendor Class

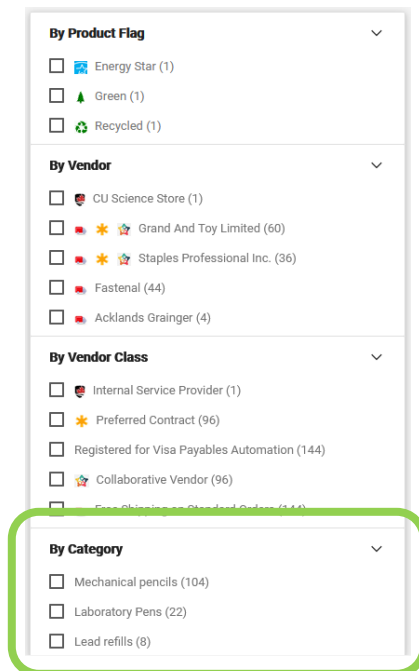
- ☐ Internal Service Provider (1)
- ☐ Preferred Contract (96)
- ☐ Registered for Visa Payables

Product Image	Product Title	Vendor	Part Number	Price (CAD)	Availability	Add To Cart
	Pencil, 0.7mm mechanical EACH*	from CU Science Store	Part Number 210016514	0.60 CAD	In stock: 10 (1. Science Store)	1 Add To Cart
	SHARP PINK MECHANICAL PENCIL	from Grand And Toy Limited	Part Number P205-P	102.48 CAD	Check Availability	1 Add To Cart
	ORENZ MECHANICAL PENCIL, 0.2MM	from Grand And Toy Limited	Part Number PP502BP-W	54.66 CAD	Check Availability	1 Add To Cart
	ORENZ MECHANICAL PENCIL, 0.5MM	from Grand And Toy Limited	Part Number PP505-A	107.88 CAD	Check Availability	1 Add To Cart
	ORENZ MECHANICAL PENCIL, 0.7MM	from Grand And Toy Limited	Part Number PP507-C	107.88 CAD	Check Availability	1 Add To Cart
	0.5 MM MECHANICAL PENCIL	from Grand And Toy Limited	Part Number BG-HRG-10R-BE	37.90 CAD	Check Availability	1 Add To Cart

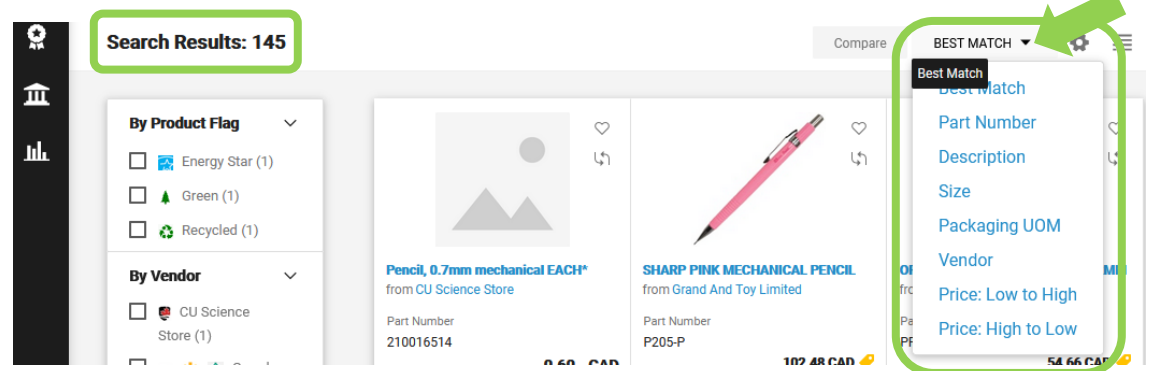
There are a number of ways to refine your search:

- Use more descriptive search words (e.g. 'mechanical pencil' vs 'pencil')
- Use **FILTER RESULTS**
- Use the **BEST MATCH** options

To use **FILTER RESULTS**, choose one or more of the filter results options from the menu on the left. When getting started, 'By Category' is often the most useful. For example, applying the 'By Category', 'Lead refills' filter limits the search to leads for mechanical pencils.

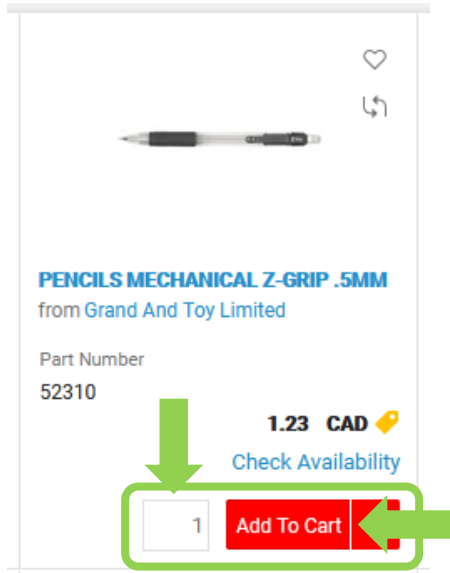


If your search has fewer than 200 results, you can use the **BEST MATCH** option. For example, 'Price: Low to High' may help you choose an inexpensive mechanical pencil.

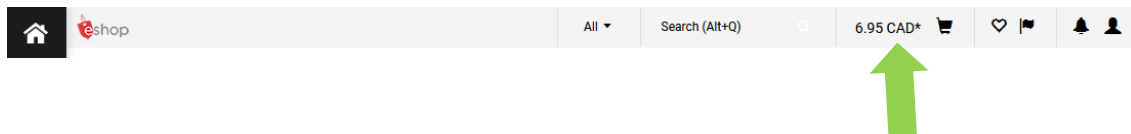


Adding a Good or Service to your Cart

- Add an item/s to your eShop cart by typing a number in the field and clicking on the red **ADD TO CART** button.



The dollar value of this item/s will be added to the total beside the cart icon in the upper right hand corner of your screen.

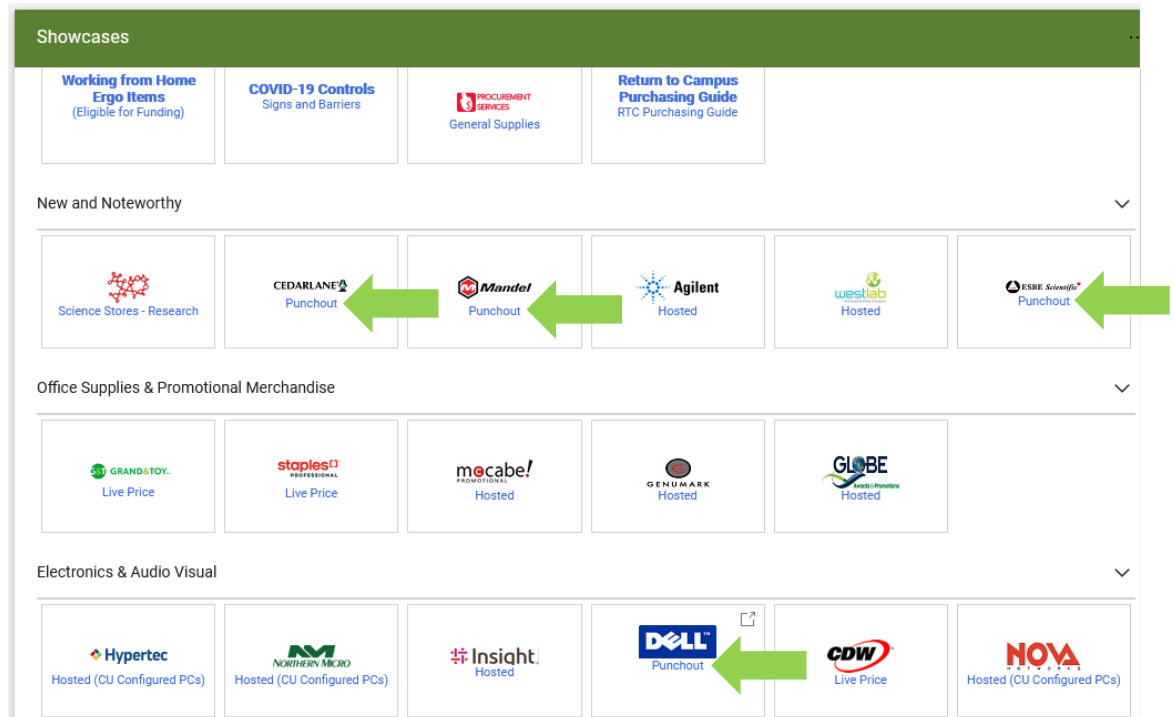


Shopping Punchout Catalogues

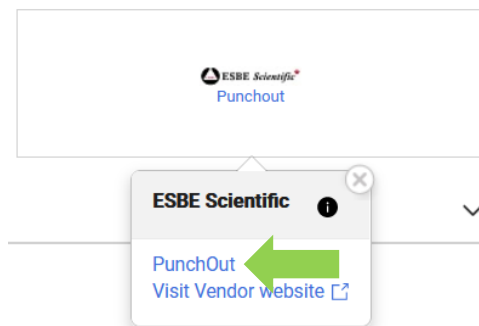
Goods from punchout catalogues will not appear in eShop search results.

The easiest way to shop a punchout catalogue is to:

- From the homepage, click directly on the **VENDOR STICKER**.



- In the window that opens, click on the blue 'Punchout' text.



Read the next section, 'Punchout Level II Catalogues' to find out how to navigate a punchout catalogue.

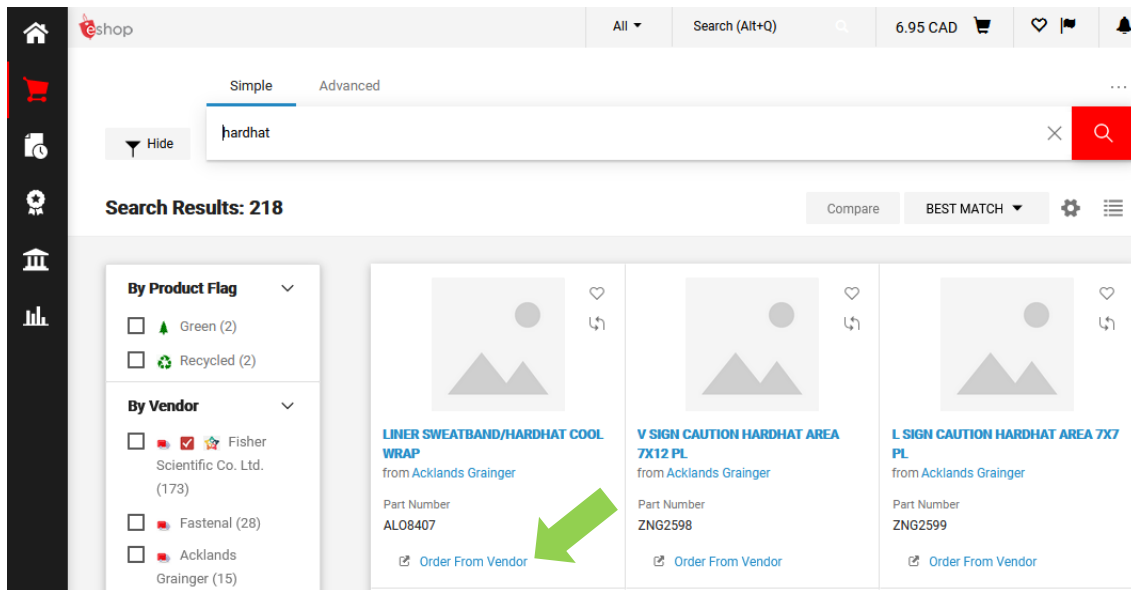
carleton.ca/facts/eshop: See step 3 of the 'Searching for Products & Saving your Favourites' how-to sheet for more information.

Shopping Punchout Level II Catalogues

Like a hosted catalogue, goods from a punchout level II catalogue will appear in search results. Each option has the type of item, followed by the vendor's name.

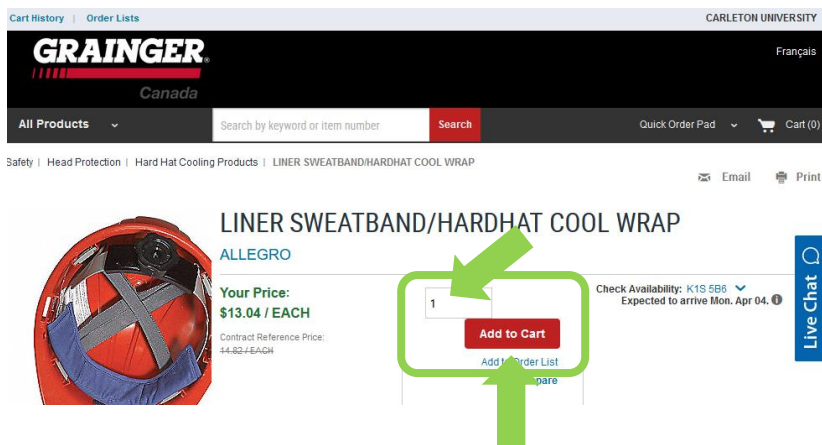
The difference is, the words **ORDER FROM VENDOR** appear. To find out the price, you have to temporarily leave eShop and go to the vendor's website by:

- Clicking on the blue **ORDER FROM VENDOR** text.

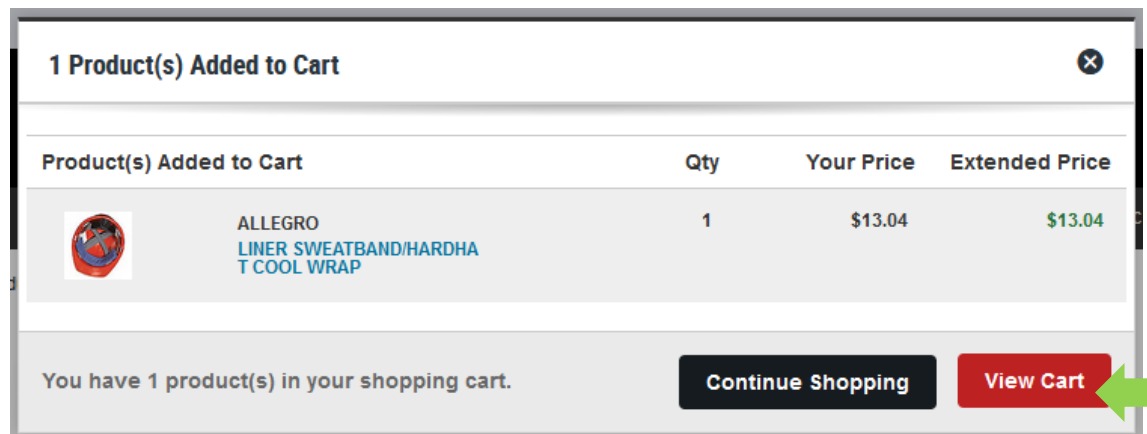


This will take you to a secure Carleton-specific page on that vendor's website.

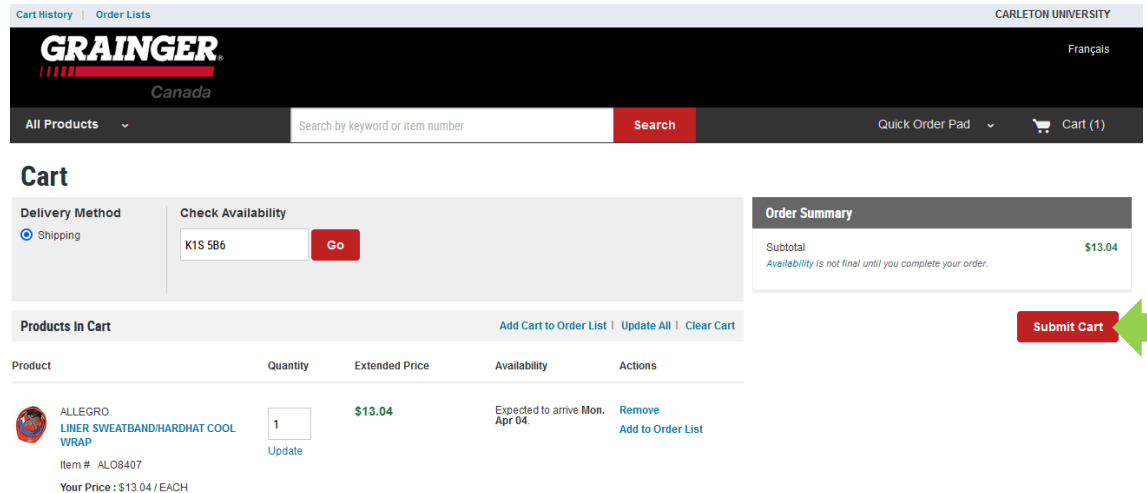
NOTE: You can exit the punchout at any time by closing the punchout window (i.e. click the X in the upper right hand corner of the window).



- To add this item to your eShop cart, enter a number in the field and click on the red **ADD TO CART** button.



- Click on the red **VIEW CART** button.



- Click on the red **SUBMIT CART** button to add the item to your eShop cart.
- Once back in eShop, you can continue shopping or click on the amount beside the cart icon to proceed to checkout.

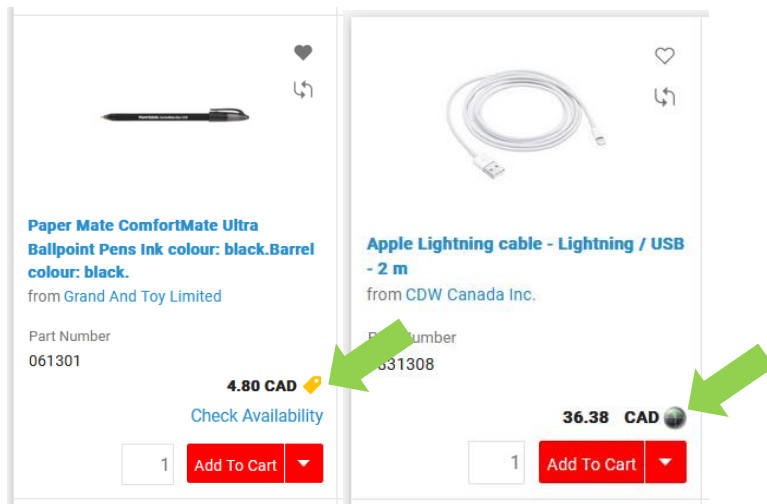


NOTE: Just as they do on any other website, the look/ feel and steps required to add an item to a cart and checkout will vary by vendor.

Shopping Live Price Catalogues

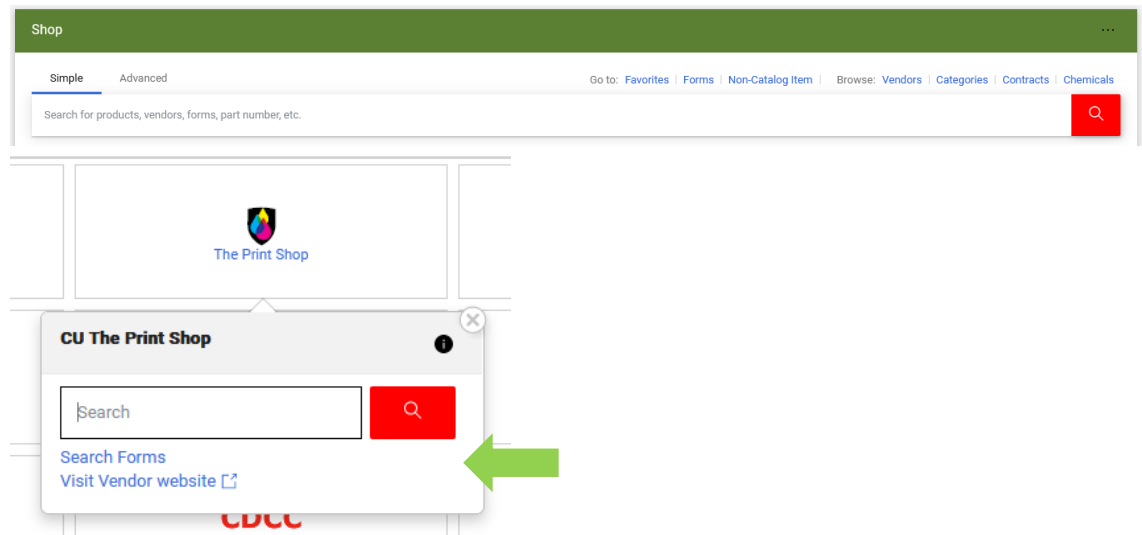
Live price catalogues behave like hosted catalogues (page 17). The only differences are:

- 'Getting Live Price' text will appear for a few seconds before the price appears, and
- either a yellow price tag icon or a circle icon will appear beside the price. If you hover your cursor over either icon, 'Live Price retrieved directly from vendor' will appear.



Shopping Internal Vendors

Like hosted catalogues, internal catalogues display all of the information and prices that an internal vendor has to offer. You will search for goods and shop the same way. The only difference is that when you click on the Internal catalogue stickers on the homepage you will have the additional option to search forms (see Chapter 4: Filling Out eShop Forms to find out more).



You Did Not Find the Catalogue you were Looking For

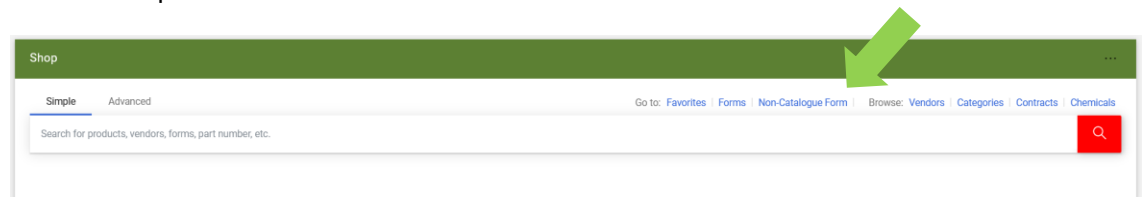
If you have searched eShop and you have not found the catalogue or good or service that you were looking for, you can try one of the following

'Non-Catalogue Form'

If you know the item and part number, you can use a 'Non-Catalogue Form' to order the item if the following are true:

- Your information is accurate (e.g. part number)
- The catalogue is corporate. For example, you could use this form for a good from Staples Professional (the corporate version of Staples) but not Staples.ca.
- The vendor exists in eShop (i.e. you do not have the option to enter a vendor manually on this form)

From the homepage, you'll find the link to the 'Non-Catalogue Form' above the 'shop' from the top.



- To fill out the form, simply fill in the **REQUIRED FIELDS** and the **COMMODITY CODE** field.

Pcard

You still have the option to use your Pcard if you cannot find a good or service in eShop. For example, you must use a Pcard to place orders for Staples.ca.

Keep in mind that using a Pcard for those items that are available in eShop hinders the University's ability to track spending and negotiate better contacts with our vendors.

Checking Out

Once your cart is full:

- Click on the **CART ICON** in the grey dashboard.



- Click on the red **CHECKOUT** button check out.

Checkout

You Do Not Have Any Warnings




If you have set your default address and funding default (see Chapter 2), you'll likely be in a position to submit your requisition. The 'submit requisition' button will be enabled.



It is a good idea to give the cart a meaningful name. To do this, click on the **PENCIL ICON** beside the word **general**. This will make it easier to find the cart later. The name of the cart will also become the name of the requisition.

Requisition • 156126702

Taxes/S&H PO Review Comments Attachments History

General  **Shipping**  **Billing** 

Cart Name
April 2022

Description
no value

Prepared by

Department
Finance Office (Finance Office)

Prepared for

PO Clauses
3 [View details](#)

Ship To

Attn:
Room: 301
Robertson Hall
1125 Colonel By Drive
Ottawa, ON K1S 5B6
Canada

Delivery Options

Ship Via
Best Carrier-Best Way

Requested Delivery Date
no value

Bill To

Accounts Payable
301 Robertson Hall
Business Office
1125 Colonel By Drive
Ottawa, ON K1S 5B6
Canada

Billing Options

Transaction/Accounting
Date
no value

Expense Funding

Values vary by line.

Draft

Be aware of these issues.
You may review and proceed.

[Empty: Activity](#)

Total (140.41 CAD)

Subtotal 124.39
HST/GST 16.02
PST/QST 0.00
Shipping 0.00
Handling 0.00
140.41

What's next for my order? >

[Assign Cart](#) [Submit Requisition](#)

- Review the details of the requisition and then click on the red **SUBMIT REQUISITION** button.



The following confirmation will appear on the screen.

Requisition Submitted

Next Steps

You can view or print this at: [Requisition 1491762](#), or via the [Document Search](#) page

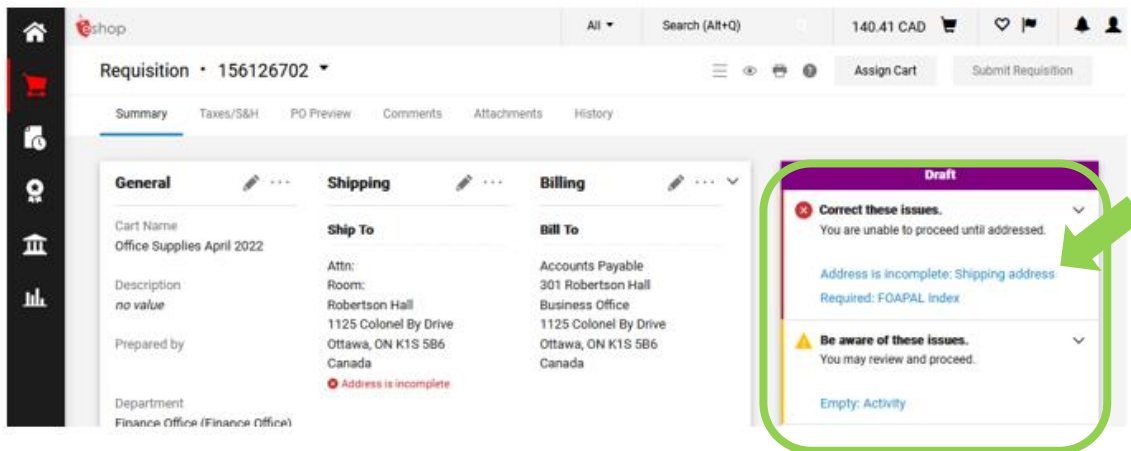
- [View Approval Status](#)
- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

You Have Received a Warning/s – What Next?

Warnings that your requisition cannot be submitted will be listed under the purple **DRAFT** header. The most common warnings that will prevent you from submitting your requisition are missing funding or address information. Setting your address default will help. Read Chapter 2 to find out how.

To add the address from this screen you will:

- Click on the blue **ADDRESS IS INCOMPLETE: SHIPPING ADDRESS** text.



The screenshot shows the eShop interface for Requisition 156126702. The 'Draft' section on the right contains a warning: "Correct these issues. You are unable to proceed until addressed. Address is incomplete: Shipping address. Required: FOAPAL index". A green box highlights this section, and a green arrow points to the "Address is incomplete: Shipping address" text.

- In the window that opens up, ensure all required fields are filled in AND/ OR click on the radio button beside your address OR enter your building in the **SEARCH ADDITIONAL** field and click the **MAGNIFYING GLASS ICON**.

The screenshot shows the 'Edit Shipping' window. The 'Ship To' section has a 'CURRENT ADDRESS' tab selected. A green box highlights the 'Attn: *' and 'Room: *' fields. Below them, the address details are listed: Contact Line 1: Robertson Hall, Address Line 1: 1125 Colonel By Drive, City: Ottawa, Province/State: ON, Postal/Zip Code: K1S 5B6, Country: Canada. A green arrow points to the 'SEARCH ADDITIONAL' field, which is also highlighted with a green box. The 'Results Per Page' is set to 10. The 'Delivery Options' section shows 'Ship Via' as 'Best Carrier-Best Way' and 'Requested Delivery Date' as a date picker. At the bottom right, there are 'Save' and 'Close' buttons.

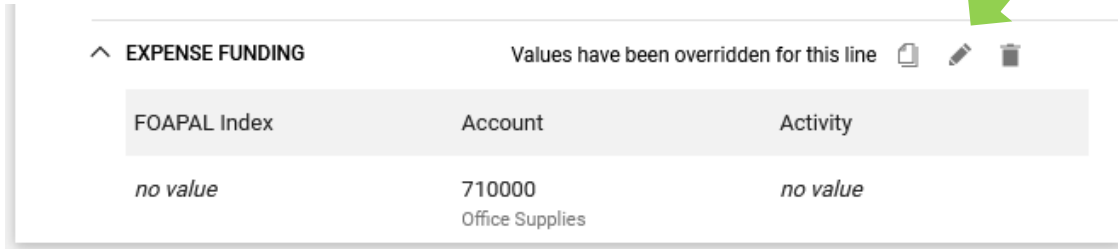
carleton.ca/facts/eshop: Read the 'Signing into eShop for the first time: profile & default address' how-to sheet for more information.

To add the funding from this screen:

- If **REQUIRED: FOAPAL INDEX** appears in the purple draft window you must add the funding to an expense line.

The screenshot shows a purple 'Draft' window. It contains an error message: 'Correct these issues. You are unable to proceed until addressed.' Below the message, it says 'Required: FOAPAL Index'. A green arrow points to this text.

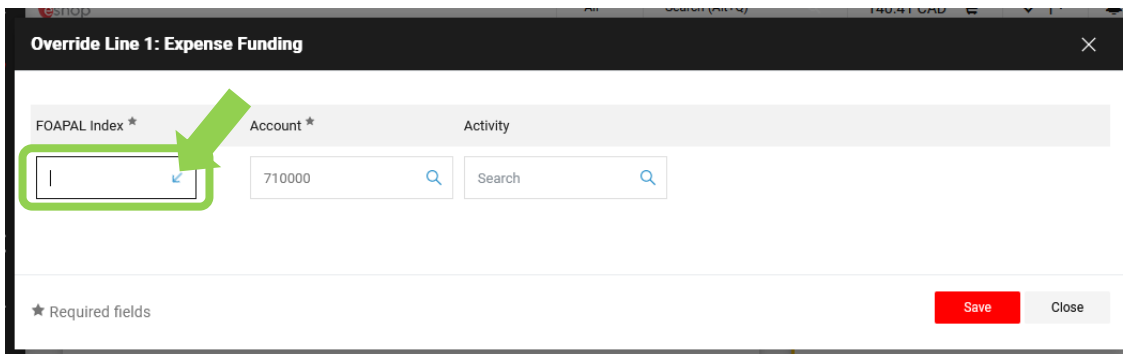
- Scroll down until you find a **FOAPAL INDEX** with **NO VALUE**. Click on **PENCIL** icon to add a founding source.



Values have been overridden for this line

FOAPAL Index	Account	Activity
no value	710000 Office Supplies	no value

- In the 'Override Line 1: Expense Funding' window that opens, click on the blue arrow in the **FOAPAL INDEX** field.



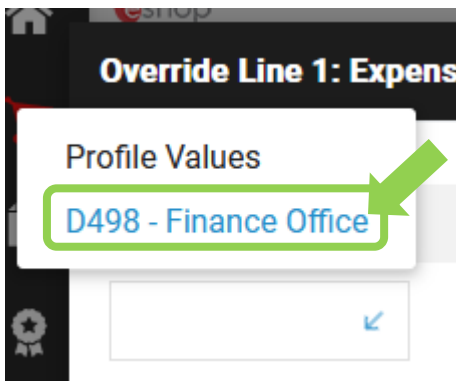
Override Line 1: Expense Funding

FOAPAL Index *	Account *	Activity
<input type="text"/>	710000	Search

★ Required fields

Save Close

- Click on the index that you would like this purchase charted to.



Override Line 1: Expense Funding

Profile Values

D498 - Finance Office

- The 'Account' code field will be automatically populated based on the commodity code provided by the vendor (i.e. when ordering from a catalogue) or the commodity code that you have chosen (e.g. when filling out a Purchase Requisition)
- You can choose an alternate account code by clicking on the **MAGNIFYING GLASS ICON** in the **ACCOUNT** field.

- Click the red **SAVE** button to save your changes.

Override Line 1: Expense Funding

FOAPAL Index *	Account *	Activity
D498	710000	Search

★ Required fields

Save Close

- Repeat these steps for all missing FOAPAL indexes.

TIP: If you do not have access to the index or account code that you require, email eshop@carleton.ca.

carleton.ca/facts/eshop: Read the ‘Default Index and Activity Code Pick Lists’ how-to sheet for more information.

The ‘Activity’ field is optional. In this example you would now be able to submit your cart.

Draft

⚠ Be aware of these issues.
You may review and proceed.

Empty: Activity

Total (140.41 CAD)	
Subtotal	124.39
HST/GST	16.02
PST/QST	0.00
Shipping	0.00
Handling	0.00
	140.41

What's next for my order?

- Review the details of the requisition and then click on the red **SUBMIT REQUISITION** button.

Submit Requisition

Chapter 4: Filling Out eShop Forms

This section will cover:

- ✓ Before you Begin ...
- ✓ Filling out Purchase Requisition Forms
- ✓ Filling out a Cheque Requisition for Payment to a Vendor
- ✓ Filling out a Cheque Requisition for Payment to an Independent Contractor
- ✓ Filling out Internal Service Provider Forms
- ✓ Non-Catalogue Forms

Before you begin ...

When you begin filling out forms and adding them to carts you need to be aware of the following ...

PURCHASE REQUISITIONS

You can combine catalogue items and purchase requisitions in one cart. However, all of the items in the cart will go through approvals together. Keep in mind that goods and services with larger dollar values and/or purchasing requirements will likely have more approval steps.

CHEQUE REQUISITIONS

When using eShop cheque requisitions:

- When filling out the cheque requisition form: You CANNOT bundle multiple invoices into one cheque requisition form.
- When you add a cheque requisition to a cart: There can ONLY be cheque requisitions in a cart.
- We recommend that you ONLY put one cheque requisition in a cart at a time. However, more than one cheque requisition can be put into a cart as long as there is only one per vendor. Adding two or more cheque requisitions from a single vendor in the same cart will cause delays in processing your requisition.

INTERNAL SERVICE PROVIDER FORMS

You can combine catalogue items and internal service provider forms in one cart. However, all of the items in the cart will go through approvals together. Keep this in mind if you have multiple requests related to the same event. For example, you may not want to have a moving request with a room booking travelling through approvals together.

NON-CATALOGUE FORMS

A 'non-catalogue form' form cannot be used for the following:

- Vendors that are not already in eShop

Filling out Purchase Requisition Forms

When to Use the Purchase Requisition Form

Completion of this form is **mandatory** if:

- You cannot find goods/ service in the catalogue AND
- Your purchase is over \$10,000

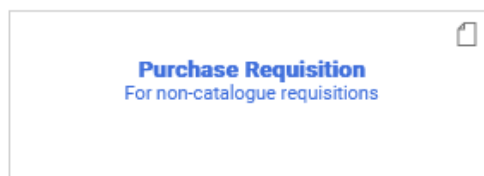
Before you Fill Out the Purchase Requisition Form

Prior to filling out your requisition, make sure you received the requisite number of quotes as required by the Procurement Policy (carleton.ca/secretariat/policies/). You are going to need the exact information from the vendor in order to proceed.

How to Find the Purchase Requisition Form

The easiest way to find the purchase requisition form is to:

- Click on the **PURCHASE REQUISITION STICKER** on the homepage, at the bottom of the vendor showcase in the Forms category.



Filling out the Purchase Requisition Form

The box at the very top labelled 'Form Instructions' tells you what the form is for and any important information about filling it out. For example, all required fields are bolded.

Purchase Requisition

Available Actions: [Add and go to Cart](#) [Close](#)

Form Instructions

Completion of this form is **mandatory** for orders over \$10k, but may be used for any order not found in eShop catalogues. Required fields are in **bold**. As per the [Purchasing Policy](#), the **Competitive Bid Requirements** section must be completed so that Purchasing Services can confirm and document that the appropriate number of quotes were obtained **or** if a sole source justification is valid **or** if an RFP has previously been awarded. Please verify the currency is correct when selecting the vendor (the vendor may have multiple currencies available). For further assistance, please contact [Purchasing Services](#).

Vendor Information

Requested Delivery Date:

Please enter or search for the vendor of choice. If the vendor cannot be found, select **Manual Entry** and enter the details.

Enter Vendor:

or [Vendor Search](#) | [Enter Manually](#)

Currency:

Additional/Secondary Contact Information (Optional)

Contact Name:

Address 1:

Address 2:

Address 3:

City:

Province/State:

Postal/Zip Code:

Country:

Commodity Code:

Does this order contain lasers, controlled goods, biohazardous materials? ☐ Yes ☐ No

Does this order require a radiolotope permit? ☐ Yes ☐ No

Competitive Bid Requirements

Quotes or Exception Type:

1. For Quotes Have Been Attached -> Attach the quote(s) for the vendor(s) in the "Quotes and Supporting Documentation" section below.

- Less than \$10k: Attach one quote which outlines the order specifics.
- Greater than \$10k and less than \$50k: Attach 2 quotes from different vendors for comparable products
- Greater than \$50k and less than \$100k: Attach 3 quotes from different vendors for comparable products
- Equal to or greater than \$100k: contact [Purchasing Services](#)

2. For Single/Sole Source with Quote Attached -> Attach the Single/Sole Source form, [available to download from Purchasing Services](#), and the quote in the Quotes and Supporting Documentation section below. If the Single/Sole Source form has been submitted in the past, enter the previous purchase order number in the field below.

3. Contract Reference Number -> Enter the contract number in the field below. For use when a completed contract exists on record with Purchasing Services.

Contract Reference Number and/or Additional Comments:

2000 characters remaining [expand](#) | [clear](#)

Quotes and Supporting Documentation

Please attach all required quotes and supporting documentation, including any sole/single source documents.

Internal Attachments:

[Add Attachments](#)

Note: Internal comments can be added on the Requisition's Summary screen during the check-out process.

Requisition Details

Item Description	Unit Price	Quantity	Ext. Price
<input type="text"/>	<input type="text"/>	<input type="text"/>	0.00

Beginning on the left side of the form:

- Enter the **REQUESTED DELIVERY DATE** that you'd like to receive the good/s on
- **ENTER VENDOR** by typing the vendor name in the field. If the vendor is in the system, the name will auto complete as you type.
- If the vendor does not autocomplete, you can also click on the blue **VENDOR SEARCH** text beneath the enter vendor field.
- If the vendor does not exist in eShop, you can enter it manually by clicking on the blue **ENTER MANUALLY** text beneath the enter vendor field and typing the required information.
- If you enter the vendor manually, you must choose the vendor's **PREFERRED METHOD OF COMMUNICATION** by clicking the box beside either **FAX** or **EMAIL** and entering either the fax and/or email address that the vendor has provided in the quote.

Commodity codes are part of the 'nuts and bolts' of eShop. It allows us to route documents and compare like items. On a purchase requisition, you need to tell eShop what you are requesting.



Use the drop down box to find the **COMMODITY CODE** which is the best fit for your product.

NOTE: Professional and technical services are bundled as commodity code 8000.

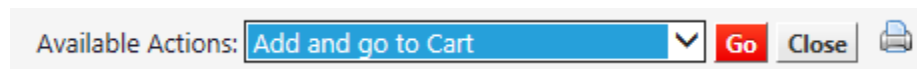
- Answer **DOES THIS ORDER CONTAIN LASERS, CONTROLLED GOODS, BIOHAZARDOU MATERIALS?** by clicking on the radio button beside either yes or no.
- Answer **DOES THIS ORDER REQUIRE A RADIOISOTOPE PERMIT?** by clicking on the radio button beside either yes or no.
- Enter the **ITEM DESCRIPTION, UNIT PRICE, and QUANTITY** in the available fields. Repeat as necessary.

Going to the top right of the form:

- Choose the **QUOTES OR EXCEPTION TYPE** from the drop down menu.
- Attach **QUOTES AND SUPPORTING DOCUMENTATION** by clicking the grey **ADD ATTACHMENTS** button.

Submitting the Purchase Requisition Form

- In the upper right hand corner of the screen, choose from the **AVAILABLE ACTIONS** by clicking on the drop down arrow.
- Choose **ADD AND GO TO CART**.
- Click on the red **GO** button.



- See page 25 of this guide for instructions on checking out.

NOTE: When the purchase order is encumbered in the general ledger, everything in one purchase requisition form will appear as one line item.

carleton.ca/facts/eshop: Read the 'Purchase Requisition Forms' how-to sheet for more information.

Filling out a Cheque Requisition for Payment to a Vendor

When to Use the Cheque Requisition Form



The eShop cheque requisition form should be used to request payment to an individual or vendor when the following criteria have been met:

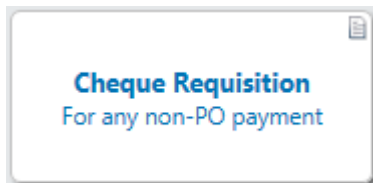
- A purchase order HAS NOT been processed for the invoice received, and
- the payment is not for personal reimbursement of business expenses (travel, non-travel, as well as professional expense reimbursement must be done submitted through the SAP Concur Travel and Expense Reimbursement system).

Social Insurance Numbers should NEVER be included on this form. If required, Accounts Payable will contact the Requestor for this information.

How to find the Cheque Requisition Form

The easiest way to find the cheque requisition Form is to:

- Click on the **CHEQUE REQUISITION STICKER** on the homepage, at the bottom of the vendor showcase in the Forms category.



Filling out the Cheque Requisition Form

The box at the very top right of the form tells you what the form is for and any important information about filling it out. For example, all required fields are bolded.

Cheque Requisition

Available Actions: Add and go to Cart

Carleton University
Canada's Capital University

This form can be used to request payment to an individual or vendor when the following criteria have been met:

- A Purchase Order has not been processed in eShop for the invoice received, and
- The payment is not for personal reimbursement of business expenses (Travel and non-travel claims as well as professional expense reimbursement must be done using the [Travel and Expense Reimbursement System](#))

Social Insurance Numbers should not be included on this form. If required, Accounts Payable will contact the Requestor for this information.

Required fields have their titles shown in **bold**.

Payments to Individuals and Sole Proprietorships for Services

The determination of an individual or sole proprietor's status as an independent contractor must be documented. To check if this vendor has been documented as an independent contractor for this type of work, search for contracts in the Catalogs and Contracts menu.

If this vendor has not been documented as an independent contractor for this type of work, the [Independent Contractor Questionnaire](#) and an [Indemnification Form](#) must be submitted and approved prior to submitting this requisition. The Independent Contractor Questionnaire (which contains a link to the Indemnification Form) can be found in the General Purchasing and Payment Forms section of "All Departmental Forms" from the home Shopping page.

Once the active contract number has been determined enter it in the field below.

Independent Contractor Contract #

Services Performed Outside Canada

Was this work performed outside Canada?

☐ No
☐ Yes

Non-residents who enter Canada to perform work for Carleton University will be subject to withholding taxes, to be held and remitted by Carleton on behalf of the non-resident. Withholding tax will be deducted in the amount of 15% of the earnings (US residents earning less than \$5000 will be levied at 10% only) and the payment total will be reduced by this amount. Should a department choose to ensure that the individual receive the full amount after withholding tax, the department must assume the additional cost.

Does the department wish to incur the additional cost of the withholding tax so that the individual will receive the full amount?

☐ No
☐ Yes

Vendor Information

Please enter or search for the vendor. If the vendor name cannot be found, select **Manual Entry** and enter the vendor details.

Enter Vendor

or

[Vendor Search](#) | [Enter Manually](#)

Currency: CAD

Additional/Secondary Contact Information (Optional)

Contact Name

Address 1

Address 2

Address 3

City

Province/State

Postal/Zip Code

Country

Additional information for Accounts Payable can be entered in the box below.

Required Payment Information

Commodity Code

Payment Amount Before Taxes

Is there tax on this invoice? (check box for yes)

Invoice Date

Optional Payment Information

Vendor Account Number

Vendor Inv #

Due Date

Requested Payment Method

Payment Instructions

If the vendor requires a payment in a currency other than Canadian or US, please download the [Electronic Payment Form](#). This form contains personal banking information. To ensure the security of this data, completed forms should be hand delivered to Accounts Payable, 301 Robertson Hall, rather than mailing or emailing them.

The following boxes are NOT required for payments to a vendor:

- 'Payments to individuals and sole proprietorships for services'
- 'Services performed outside Canada'

Complete the **VENDOR INFORMATION** section:

- ENTER VENDOR** by typing the vendor name in the field. If the vendor is in the system, the name will autocomplete as you type.
- If the vendor does not autocomplete, you can also click on the blue **VENDOR SEARCH** text beneath the enter vendor field.
- If the vendor does not exist in eShop, you can enter it manually by clicking on the blue **ENTER MANUALLY** text beneath the enter vendor field and typing the required information.
- If you enter the vendor manually, you must choose the vendor's **PREFERRED METHOD OF COMMUNICATION** by clicking the box beside either **FAX** or **EMAIL** and entering either the fax and/or email address that the vendor has provided in the quote.

Complete the **PAYMENT INFORMATION** section:

- Use the drop down arrow to find the **COMMODITY CODE** which is the best fit for your good or service.



Commodity codes are part of the 'nuts and bolts' of eShop. It's what allows us to route documents and compare like items. On a cheque requisition, you need to tell eShop what you are requesting.

To find a complete list of commodity codes and associated account codes:

<http://carleton.ca/facts/eshop/eshop-frequently-asked-questions/>

Funding

- **Where can I find the complete list of commodity codes and associated account codes?**

- Type the **PAYMENT AMOUNT BEFORE TAXES** in the field.
- Answer the question **IS THERE TAX ON THIS INVOICE?** by clicking the radio box beside yes. Leaving the same radio box blank for no.
- Choose the **INVOICE DATE** by clicking on the calendar icon beside the field.

If the invoice is in a foreign currency:

- Choose the **REQUESTED PAYMENT METHOD** from the drop down menu AND
- Follow the instructions in the **PAYMENT INSTRUCTIONS** section of the form
- Attach **ALL RELEVANT SUPPORTING DOCUMENTATION, INCLUDING A COPY OF THE INVOICE** by clicking the grey **ADD ATTACHMENTS** button.

Submitting the Cheque Requisition Form

- In the upper right hand corner of the screen, choose from the **AVAILABLE ACTIONS** by clicking on the drop down arrow.
- Choose **ADD AND GO TO CART**.
- Click on the red **GO** button.

Available Actions: Add and go to Cart Go Close

- See page 25 of this guide for instructions on checking out.

carleton.ca/facts/eshop: Read the 'Cheque Requisition forms for payment to vendors' how-to sheet for more information.

Filling out a Cheque Requisition for Payment to an Independent Contractor

An independent contractor is a status identifying the nature of the relationship between an individual providing a service and Carleton, as outlined and applied by the Canada Revenue Agency (CRA). CRA has prepared a guide to help entities determine the nature of their working arrangement as either employer/ employee or one of an independent contractor providing a service to a third party.

Why is this important?

This determination dictates whether the individual will be paid through payroll and have taxes deducted at source or will be responsible for reporting and remitting to CRA directly.

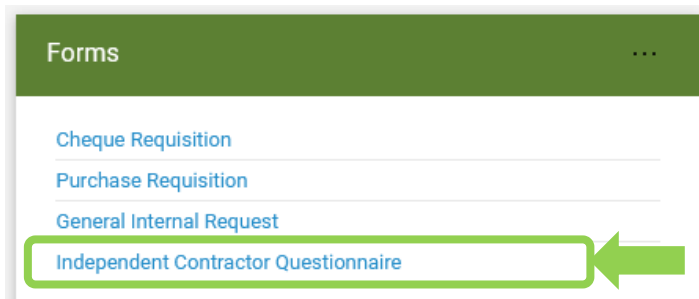
It is important for the University to properly classify independent contractors. Unlike employees, independent contractors do not have employment taxes withheld and are not eligible for University benefits. If an individual is incorrectly classified as an independent contractor and should have been hired as an employee, the University/ department could be assessed fines by the CRA and/or be required to pay damages to individuals.

How does this apply to the Cheque Requisition Form?

At Carleton, we capture this assessment in the 'Independent Contractor Questionnaire' form. This form must be completed prior to any payment made to an individual not already an employee of Carleton University.

The section of the cheque requisition form which addresses this is called **PAYMENTS TO INDIVIDUALS AND SOLE PROPRIETORSHIPS FOR SERVICES**. Read the instructions in this section.

- If you have already completed the independent contractor questionnaire, enter the number in the **INDEPENDENT CONTRACTOR #** field, and then complete the cheque requisition as outlined in the previous section.
- If you have NOT completed the 'Independent Contractor Questionnaire' form, you must do so before completing the cheque requisition form. The quickest way to find this form is by clicking on the blue **INDEPENDENT CONTRACTOR QUESTIONNAIRE** text in the Forms box.



- Once the individual has been assessed as an independent contractor, then you may complete the cheque requisition form as outlined in the previous section.

Please contact accounts.payable@carleton.ca should you require assistance in completing this form.

carleton.ca/facts/eshop: Read the 'Cheque requisition forms for payment to independent contractors' how-to sheet for step by step instructions

Filling Out Internal Service Provider Forms

An eShop internal request form may be used in one of two ways.

Option 1: After contacting the service department, their representative will complete the form with the order/ charge details and estimated amounts. The representative will then assign a shopping cart to you with the completed form as a line item. Review the form in the line item of the cart and then submit the requisition to indicate that you agree/ approve of the details and estimate.

Option 2: If you have not contacted the service department, fill out as much of the information to identify the nature of your request. You do not need to specify any amounts. Add the form to your cart, and then submit the requisition. A representative from the service department will receive and review your request, update it with the estimated costs, and return it back to you for your review and approval/ resubmission.

Where to find the Internal Service Provider Form

- The easiest way to find these forms is to click on the **ALL DEPARTMENTAL FORMS** sticker at the bottom of the vendor showcase on the homepage.



- In the new screen, choose the appropriate **SHARED** folder menu on the left to see a list of their form options. If a form is not listed for the department, please contact them to discuss your requirements.

How to fill out the Internal Service Provider Form

- Each form is a little different. Follow the instructions found at the top of each form.

Submitting the Internal Service Provider Form

NOTE: Each internal service provider may have a preferred method for receiving your request. The form you select will indicate the preferred method; however, if you have any questions, please contact the service provider using the contact information provided in the form.

- In the upper right hand corner of the screen, choose from the **AVAILABLE ACTIONS** by clicking on the drop down arrow.
- Choose **ADD AND GO TO CART**.
- Click on the red **GO** button.



- See page 25 of this guide for instructions on checking out.

What happens next?

The approval path that your shopping cart takes once it becomes a requisition document will depend on your roles (i.e. Shopper, Requisitioner, Approver), the items in the cart (form or catalogue), and the type of funding being used to pay for the request.

If your service provider form requires an estimate, a representative from the service department will review the form and update it with the estimate, and return it to you for review, approval and resubmission.

Alternatively, a service department may complete a form, add it to a shopping cart, and assign the cart to the person who requested the service so that they can submit it as a requisition. Forms that are marked for estimate will still need to route to the service

provider in this scenario; however, the service provider will not need to return it to the shopper for review.

At the end of the requisition workflow, eShop will email the finalized purchase order to the service department.

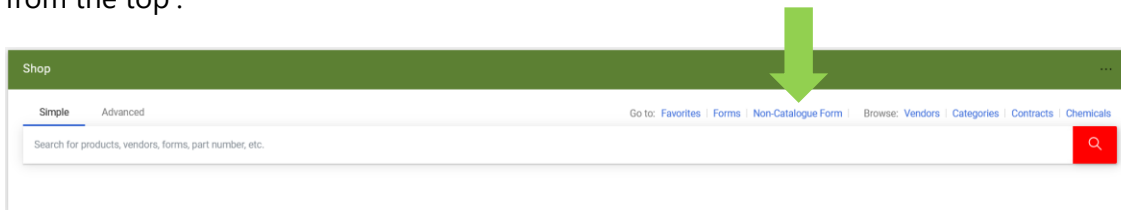
Once the order has been fulfilled, the service department will complete the financial recovery process. At the end of recovery, the shopper will be sent an email indicating that the billing is complete.

Non-Catalogue Forms

If you know the item and part number, you can use a 'Non-Catalogue Form' to order the item if the following are true:

- Your information is accurate (e.g. part number)
- The catalogue is corporate. For example, you could use this form for a good from Staples Advantage (the corporate version of staples) but not Staples.ca.
- The vendor exists in eShop (i.e. you do not have the option to enter the vendor manually on this form)
- Your order is \$10,000 or less
- Your order is not for an internal service/ to an internal service provider

From the homepage, you'll find the link to the 'Non-Catalogue Form' under the 'shop from the top'.



To fill out the form, simply fill in the bolded fields and the **COMMODITY CODE** field.

Add Non-Catalog Item ✕

Existing Vendor

Select Vendor 🔍

Item

Description ★	Catalog No.	Quantity ★	Price ★	Packaging
<input type="text"/> <small>254 characters remaining</small>	<input type="text"/>	<input type="text"/>	<input type="text"/>	CAD ▼ EA - Each

Additional Details

Commodity Code ▼

Add Internal Attachments

Add Internal Attachments

★ Required fields

Save

Save And Add Another

Close

Chapter 5: Tracking and Searching Documents

This section will cover:

- ✓ From Cart to Requisition
- ✓ Tracking Requisitions as They Move Through Approvals
- ✓ Quick Searches
- ✓ About Documents: Types


From Cart to Requisition

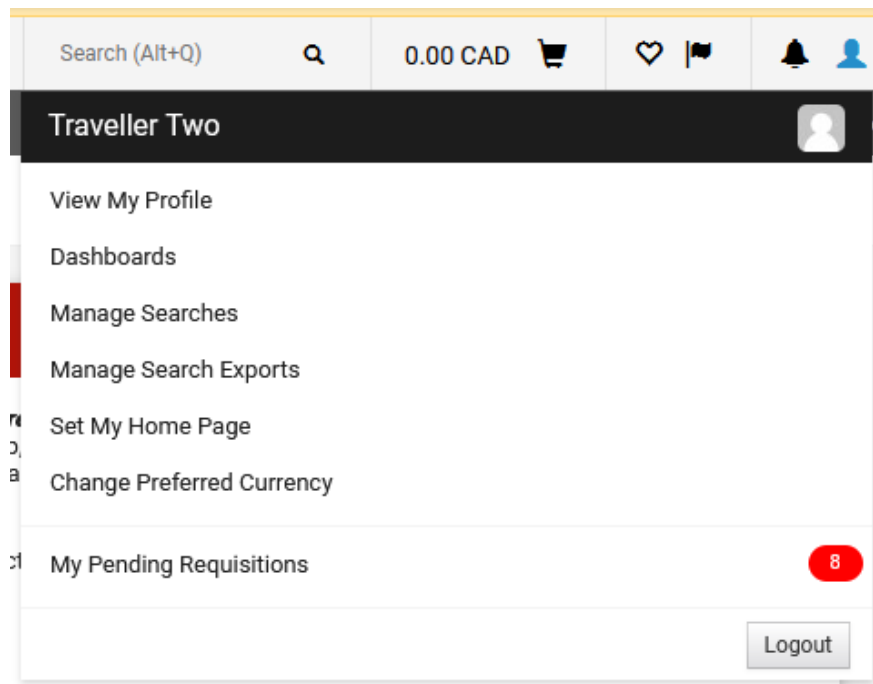
Once you submit a cart in eShop it is called a requisition. Once the requisition moves through approvals, it becomes a purchase order which is sent to the vendor.

Tracking Requisitions as They Move Through Approvals

The easiest way to track your requisitions is to view 'My Pending Requisitions' or 'My Recently Completed Requisitions' from the home page.

To find these tools:

- Click on **THE PERSON ICON** found in the upper right hand side of your screen ().
- At the bottom of the list, you will find 'My Pending Requisitions', 'My Pending Purchase Orders' or you may have another option.
- Click on the option that you are interested in.



My Pending Requisitions and **My Pending Purchase Orders** will show you all of the requisitions or purchase orders that you have submitted and are currently working their way through approvals.

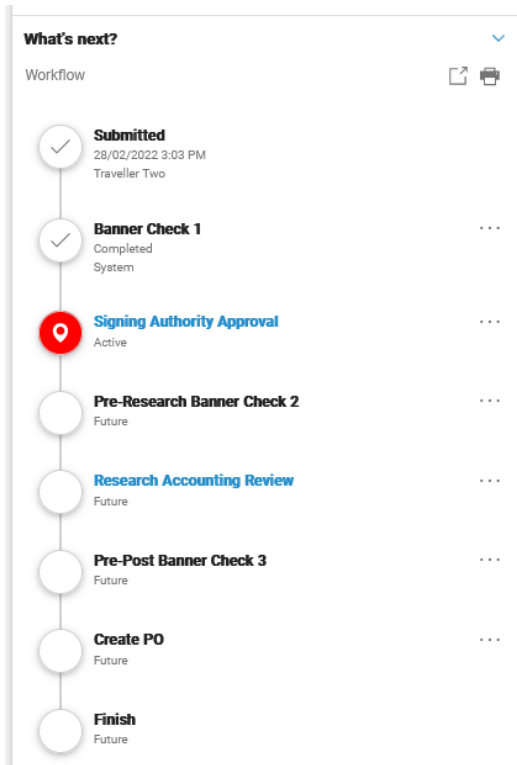
My Recently Completed Requisitions (not shown) will show you all of the requisitions that have made it through approvals in the last 90 days.

My Recently Completed Purchase Orders (not shown) will show you all of the purchase orders that have been created for requisitions in the last 90 days.

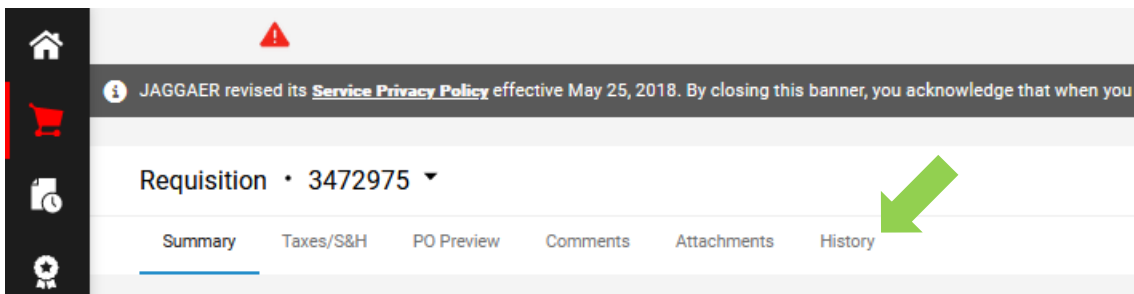
- Click on the **REQUISITION NO.** (or purchase order) that you would like to track.

<input type="checkbox"/>	Requisition Number	Vendor	Requisition Name	Requisition Status
<input type="checkbox"/>	3472975	HyperTec Systems Inc.	2022-02-28 travellertwo 01	Pending

- You can see where your requisition is in the workflow in the **WHAT'S NEXT** section on the right hand side of the screen



- To find out how long it has been at a particular step in the workflow, click on the grey **HISTORY** text beneath the requisition number.



Requisition • 3472975

Summary Taxes/S&H PO Preview Comments Attachments **History**

Start date: dd/mm/yyyy End date: dd/mm/yyyy Action: User: Requisition: Document type: Export CSV

1-8 of 8 Results 20 Per Page

Line No	Date/Time ↓	User	Step(s)	Action	Field Name	From	To	Note
	28/02/2022 3:03:50 PM	System	Banner Check 1	Requisition approved				
Line 1	28/02/2022 3:03:50 PM	System	Banner Check 1	Requisition note added				Item 1, Sequence 1: WARNING - Budget is exceeded for item

Quick Searches

There are several ways to find documents, such as requisitions, purchase orders, goods receipts and invoices.

Quick Search


If you know the document number, type it in the **SEARCH (Alt+Q)** field at the top of the screen and click enter.



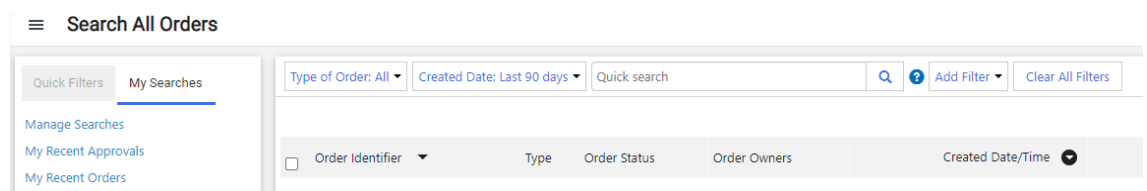
Documents Search

If you don't know the document number, the 'Orders Search' allows you to search through all of your documents in the eShop system.

To find the 'Orders Search':

- From the homepage, click on the orders icon on the far left hand side of the screen. 
- Choose **SEARCH** and **ALL ORDERS**.

This search window will appear.



There are many search options. The first section is a drop down list that filters by document type (explained in the next section); the second section lets you specify the dates for a search; while the third section is a text field that allows you to search by document number, requisition name or supplier name.

About Documents: Type

REQUISITION

All forms and carts create a requisition document and are assigned an 8-digit requisition number.

PURCHASE ORDER

Once a requisition is approved and becomes a purchase order it will be temporarily assigned an 8-digit PO number which will be updated to a Carleton PO number (Pxxx xxxx) once it has posted to Banner/ FAST.

INVOICE

Once an invoice is received, it will be assigned an 8-digit number starting with an E.

Special Note about Cheque Requisitions

A cheque requisition also creates a requisition, an eShop purchase order and an invoice. You will see these as ONLY an invoice in FAST, starting with E.



If you search on a cart name, you may see up to 4 documents related to your cart. This depends on what is in the cart and where it is in the workflow.

Chapter 6: Receipting Your Purchase Order

This section will cover:

- ✓ When is Receipting Required?
- ✓ Knowing When to Receipt
- ✓ How to Receipt
- ✓ Other Receipting Options

When is Receipting Required?

This step is required for purchase orders of goods and services valued at \$10,000 or more. Essentially, for large purchases the University needs to know if you have actually received the good/s or service/s before we pay the invoice.

Knowing When to Receipt

Once you receive the good/s or service/s, it is time to receipt.

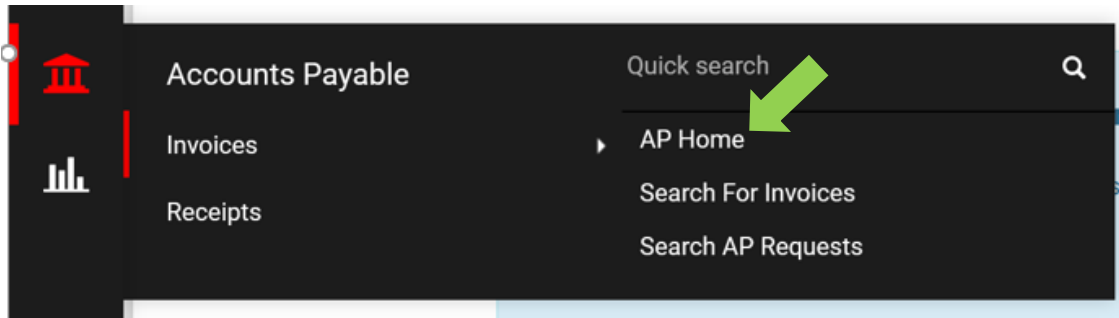
If Accounts Payable receives an invoice for a good or service, and you have not yet receipted it, eShop will send you emails and internal notifications daily starting three days after receipt of an invoice to remind you to create your receipt when you receive the goods.

How to Receipt

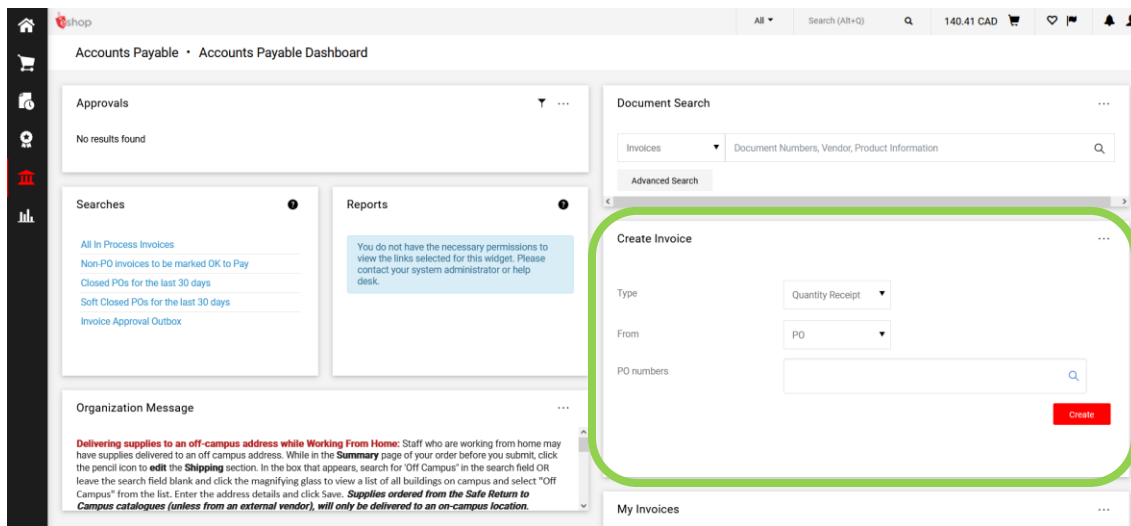
From the eShop homepage:

- click on the **ACCOUNTS PAYABLE ICON** on the far left hand side of your screen. 

- From the window that opens up, click on the white **AP HOME** text.



- On the 'Accounts Payable Dashboard' screen, you will use the **CREATE INVOICE** section.



To create a receipt for that good or service you:

- (1) Choose the **TYPE**. For goods you'd generally choose 'quantity receipt' which is the default. For services you'd generally choose 'cost receipt' from drop down menu.
- (2) Skip the **FROM**. The default, PO, is the only option.
- (3) Type the **PO NUMBER** in the field.



If you need to remind yourself what the PO number is, you can search for it in eShop. You will also receive email reminders from eShop to receipt. The PO number will also be in this email.

eShop has pulled all of the information from the Purchase Order into the new window that has opened up.

Quantity Receipt • 500149

Summary Comments Attachments History

Receipt Name: 2022-04-08 traveller two 01

Receipt No: To Be Assigned

Date Received: 08/04/2022

Packing Slip No.

Vendor Name: HyperTec Systems Inc.

Received by: Traveller Two

Receipt Address: Attn: Traveller Two, Room: B456, Southam Hall, 1125 Colonel By Drive, Ottawa, ON K1S 5B6, Canada

Draft

Details

Creation Date: 08/04/2022 10:08:27 AM

Source: Manual

Vendor: HyperTec Systems Inc.

Received by: Traveller Two

Total (690.00 CAD)

Subtotal: 690.00

690.00

Related Documents

Purchase Order: P0088257



It is a good idea to create meaningful names for your documents in the **RECEIPT NAME** field.

The most important part of receipting is to ensure that the quantity is correct.

PO • P0088257				
Line	Item	Catalog No.	Quantity	Status
1	Philips 24" IPS LED Display Monitor LED, VGA, DVI-D, DP 1.2, HDMI 1.4, Speakers, Tilt, Swivel, Height, Pivot, USB	241B8QJEB	1 1/EA	Received
ITEM DETAILS				
2	TEST		1 EA	Received
ITEM DETAILS				

The default will always be 'received' and the full amount that you ordered. If you received the full order, just leave it as it is.

If your order was incomplete, then you would enter the amount that you received. When you receive the remaining items you would complete another receipt by

following these same steps. When you enter the PO number, eShop will know that you are creating a follow-up receipt.

- To finish, click on the red **COMPLETE** button.

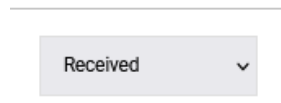
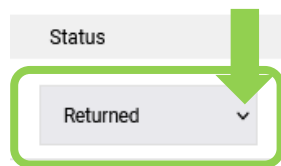


carleton.ca/facts/eshop: Read the 'Receipting Your Purchase Order' how-to sheet for step by step instructions.

Other Receipting Options

Returning Goods

In the event that item(s) are damaged, defective, incorrect, etcetera upon delivery, you must contact the vendor. If you are able to return the goods, you can choose **RETURNED** from the **LINE STATUS** drop down menu.



You would use this option if you had to return the item. You will be asked to provide a reason why the item was returned. For example, the item may have been damaged.



Keep in mind that return policies vary by vendors. So check with vendors directly or Procurement Services if we have a contract with a vendor. If you received an RMA number when you contacted the vendor, enter it in the RMA number field.

Cancelled Orders

You can also choose 'cancelled' from the **LINE STATUS** if the order was cancelled.

Need Help?



Visit our FAQ section on carleton.ca/eshop/faq



Step by step instructions can be found on www.carleton.ca/facts/eshop.



Attend a hands-on training session through the Financial Administration Community Training and Solutions (FACTS) program. Email us at facts@carleton.ca or visit www.carleton.ca/facts for current course offerings.



Email eshop@carleton.ca