Checkout
Process and Procedure
Procurement Services
Once you have added your order to your cart, you will proceed to checkout:

- Click on your cart and select **Checkout**
The checkout process is broken into seven segments:

- General
- Shipping
- Billing
- Accounting Codes
- Internal Notes and Attachments
- External Notes and Attachments
- Final Review

- indicates a section requires information before submitting the requisition
- indicates a section that is complete
Section 1- General

- This section provides the cart name, the prepared by/for name, vendor name and order detail including order total.
Section 2- Shipping

- This section allows you to indicate where the order should be delivered.
Section 2- Shipping

- A new window will appear for an address search:

Every Drexel campus/location has a shell address such as:
- For Drexel Main - search for Drexel receiving dock
- For 245 N. 15th Street - search for New College Bldg
- For 1505 Race Street – search for Bellet Building
- For 1601 Cherry Street – search for 3 Parkway
- For 2900 Queen Lane – search for Queen Lane Campus
- For 10 Shurs Lane – search for Manayunk Family Medicine
- For 4641 Roosevelt Blvd – search for Friends Hosp
Section 2- Shipping

- Once you search for your address, a list will appear

- Click the **Select** button next to the address you want to use
Section 2- Shipping

- Fill in the required fields
  - Attn: This should state your full name
  - Rm- MS: This should list your room or mail stop number but can also include your department name, building name, etc. Be sure not to exceed 20 characters in these fields
  - You can also check the box to save the address for future use

Click **Save** and your address will be complete
Section 3- Billing

- This section will automatically default to the Accounts Payable billing address
  - 3141 Chestnut Street, Philadelphia, Pa 19104
Section 4- Accounting Codes

- This section allows you to indicate the cost center the order should be allocated to
  - To edit your cost center click on *Edit*

- You will then see the Accounting Codes box
Section 4- Accounting Codes

- You have a number of options on selecting a cost center
  - You can select from your code favorites list
    - Code Favorites can be created in your profile. These are saved cost centers (Chart, Fund, Orgn, and Account) that can be nicknamed and saved in your profile
  - You can select from your profile values
    - Profile values are specific account codes saved in your profile and appear in a dropdown during checkout under profile values
  - You can select from all values
    - Click on **Select from All Values** to open the custom field search
      - You can search by value (numerical value) or by description (key word in title such as services, lab fee, archives etc.)
  - You can hand key the required fields for the cost center and then select recalculate/validate values to be sure it is a valid cost center
Section 4- Accounting Codes

- Once you have selected the correct cost center, click **Save** and the Accounting Codes section will now be complete.

You have completed the required information in this step. At this point, you can do the following:

Proceed to the next step: **Internal Notes and Attachments**. Go straight to the end: **Final Review**.
Section 5- Internal Notes and Attachments

- This section allows you to add a note and any necessary attachments to your requisition for Drexel’s review

- Clicking **Edit** will allow you to enter a note for the requisition
Section 5- Internal Notes and Attachments

- Clicking **Add Attachments** will allow you to add documents to your requisition
Section 5- Internal Notes and Attachments

- Examples of documents to attach:
  - Quotes
  - Bids
  - Tax Determination
  - Contracts
    - If contract is under $5,000, you will need to forward your requisition to Carmen Spears
  - Any documentation required by University policy or procedure for the type of request being submitted
    - Never attach documents with sensitive information such as social security numbers or account numbers—be sure to redact all sensitive information from documentation
Section 6- External Notes and Attachments

- This section allows you to add a note and any necessary attachments to your requisition for the supplier’s review
  - This will not function for Punchout Catalog orders (Dell, Fisher, Telrose, etc.)
    - For Punchout Catalog orders, please reach out to the supplier directly
Section 6- External Notes and Attachments

- Clicking *Edit* will allow you to enter a note for the requisition

![External Info](image)

- Clicking *Add Attachments* will allow you to add documents

![Add Attachments](image)
Section 6- External Notes and Attachments

- Examples of documents to attach:
  - Quotes
    - Some suppliers require a quote to be submitted with the PO
  - Drawings/Schematics
  - Any documentation required by Supplier for the type of request being submitted
    - Never attach documents with sensitive information such as social security numbers or account numbers—be sure to redact all sensitive information from documentation

- Once all of these sections are completed, you can then click Submit Your Requisition.