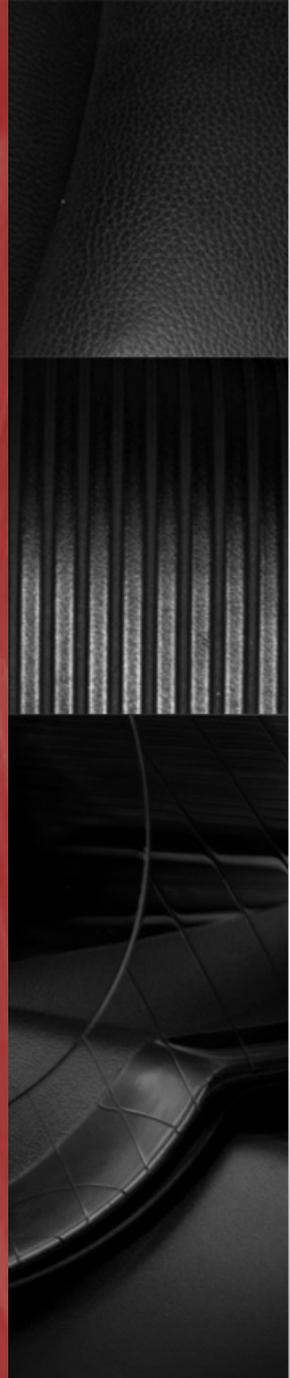


Returned Cart-Why was my requisition returned?

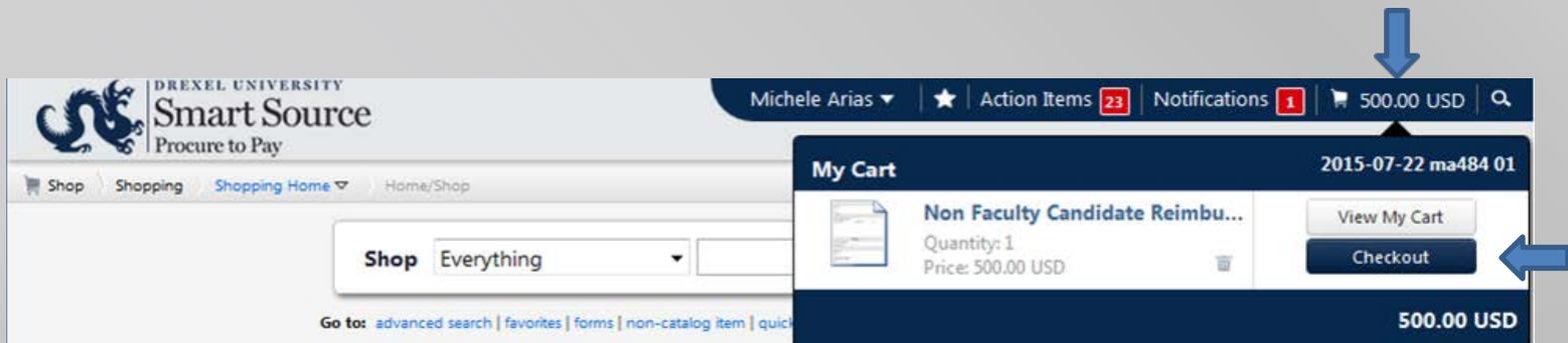
Procurement Services



There are a number of reasons why your cart may have been returned to you. Whenever your cart is returned to you; it will appear back in your shopping cart in Smart Source:



Click on your cart and proceed to checkout:



Once in your cart, you can select the history tab:

The screenshot displays a requisition cart interface. At the top, a progress bar shows seven steps: General, Shipping, Billing, Accounting Codes, Internal Notes and Attachments, External Notes and Attachments, and Final Review, all marked with green checkmarks. Below this, there are three navigation links: "Go to Express Checkout", "Return to shopping cart", and "Continue". A yellow message box contains the text: "All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page." Below the message box is a horizontal menu with tabs: "Requisition", "PR Approvals", "PO Preview", "Comments", "Attachments (1)", and "History". The "History" tab is highlighted in yellow and has a blue arrow pointing to it. Below the menu is another set of tabs: "Summary", "Shipping", "Billing", "Accounting Codes", and "Supplier Info". The main content area is divided into three columns: "General", "Shipping", and "Billing". Each column has a header with a question mark and an "edit" button. The "General" column shows "Cart Name: 2015-07-22 ma484 01" and "Description: no value". The "Shipping" column shows "Ship To: Attn: John Smith, Rm-MS Stratton 225". The "Billing" column shows "Bill To: Accounts Payable, 3141 Chestnut St".

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

Go to Express Checkout Return to shopping cart Continue

All done! The required information has been completed and this request is ready to be submitted.
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition PR Approvals PO Preview Comments Attachments (1) History

Summary Shipping Billing Accounting Codes Supplier Info

	General ?	Shipping ?	Billing
Cart Name	2015-07-22 ma484 01 <input type="button" value="edit"/>	Ship To <input type="button" value="edit"/>	Bill To
Description	no value	Attn: John Smith Rm-MS Stratton 225	Accounts Payable 3141 Chestnut St

The history tab will show you every step the requisition has taken:

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	7/28/2015 3:00 PM	Michele Arias		Requisition modified	Account	empty	3012	
Line 1	7/28/2015 2:31 PM	Michele Arias		New Line added		Form	empty	
	7/28/2015 2:22 PM	Michele Arias		Line removed	617206			
	7/27/2015 3:09 PM	Michele Arias		Requisition modified	Account	3442	empty	
	7/27/2015 3:09 PM	Michele Arias		Requisition modified	Organization	1200	3231	

There are a few errors that may occur when you submit your cart. Below are just a few of the most common examples:

Scenario 1:

Your cart may be returned to you by your financial approver or someone in another approver role such as Procurement, Office of Research, etc.

This cart was returned by Procurement because the wrong form was used.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/7/2015 1:50 PM	Lisa Coughlin	No Supplier Catch	Requisition returned		Lisa Coughlin		Hello, thank you for choosing SmartSource. We are returning this back to you since the request is... more
	5/7/2015 1:50 PM	Lisa Coughlin	No Supplier Catch	Requisition assigned				
	4/27/2015 12:48 PM		Financial Approval - Level 1	Requisition approved				

Remedy: Follow instructions provided in comments or reach out to the approver who returned your requisition for more information.

Scenario 2:

Your cart may be returned by the Banner system because you do not have authority to use the cost center listed in your requisition.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	4/14/2015 2:23 PM	System	Banner Budget Authorization	Requisition returned				
	4/14/2015 2:23 PM	System		Requisition returned		empty		Returned by banner
Line 1	4/14/2015 2:23 PM	System		Requisition Line item returned				Item 1, Sequence 1: *ERROR* User has no authority to post to fund 110960 and organization ... more
	4/14/2015 2:23 PM			Requisition submitted				

Remedy: Your department's financial/budget manager or the cost center's financial manager will need to send an email to smartsource@drexel.edu indicating your authority to utilize a specific cost center.

Scenario 3:

Your cart may be returned by the Banner system because the cost center used had insufficient budget for the amount of the requisition.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/11/2015 1:08 PM	System	Banner Budget Authorization	Requisition returned				
	5/11/2015 1:08 PM	System		Requisition returned		empty		Returned by banner
Line 1	5/11/2015 1:08 PM	System		Requisition Line item returned				Item 1, Sequence 1: Insufficient budget for item 1, sequence 1, suspending transaction.
	5/11/2015 1:08 PM			Requisition submitted				

Remedy: Review your budget in WebFinance or contact your department's financial/budget manager for more information. You may need to use a different cost center with funds or complete a funds transfer.

Scenario 4:

Your cart may be returned by the Banner system if the transaction date (when the cart was initially created) occurred in a previous accounting period that has since closed. In the example below, the cart was created on April 8th but was not approved by the financial approver until May 15th.

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	5/15/2015 3:19 PM	System	Final Banner Budget Auth	Requisition returned				
	5/15/2015 3:19 PM	System		Requisition returned		empty		Returned by banner
Line 1	5/15/2015 3:19 PM	System		Requisition Line item returned				Item 1, Sequence 1: *ERROR* Transaction date 08-APR-2015 is not in an open accounting period for... more...
	5/15/2015 3:18 PM		Financial Approval - Level 1	Requisition approved				
	4/8/2015 1:50 PM	System	Banner Budget Authorization	Requisition approved				
	4/8/2015 1:50 PM			Requisition modified	Accounting Date	empty	4/8/2015	
	4/8/2015 1:50 PM			Requisition submitted				

Remedy: Follow the job aid for Changing the Accounting Date for instructions on how to update the date of the order to the current, open accounting period.



If you received an error not listed or require any further assistance, please contact the Smart Source Hotline at: 215-895-2876 or email smartsource@drexel.edu.