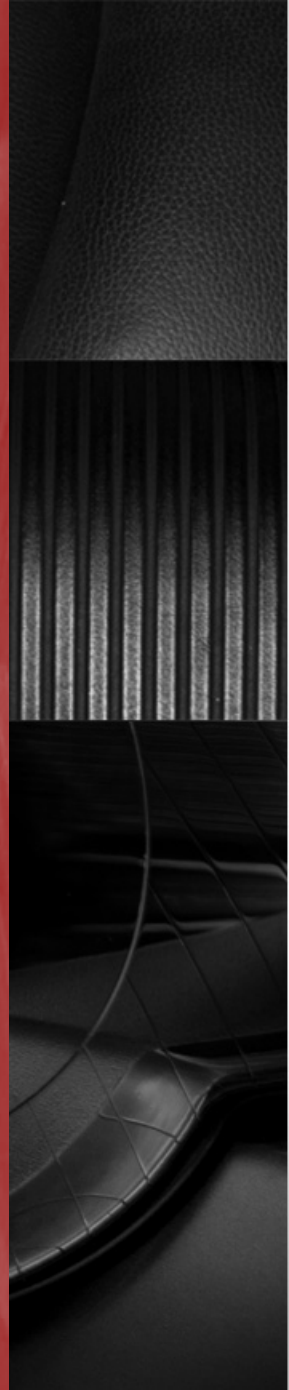


Checkout Process and Procedure

Procurement Services



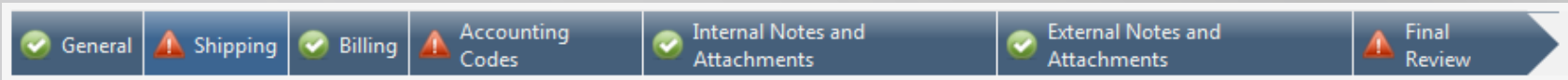
Once you have added your order to your cart, you will proceed to checkout:

- Click on your cart and select **Checkout**

The screenshot displays the Drexel University Smart Source Procure to Pay interface. At the top left is the Drexel University logo and the text "DREXEL UNIVERSITY Smart Source Procure to Pay". The top right navigation bar includes the user name "Michele Arias", a star icon, "Action Items 21", "Notifications 1", and a shopping cart icon with "381.90 USD" next to it, which is circled in red. Below the navigation bar is a breadcrumb trail: "Shop > Shopping > Shopping Home > Home/Shop". A search bar contains the text "Shop Everything". Below the search bar are links for "advanced search", "favorites", "forms", "non-catalog item", and "quick". On the right side, a "My Cart" sidebar is open, showing the date "2015-07-22 ma484 01". The cart contains one item: "Office Depot(R) Brand ImagePr..." with a quantity of 10 and a price of 381.90 USD. To the right of the item are two buttons: "View My Cart" and "Checkout", with the "Checkout" button circled in red. At the bottom right of the cart sidebar, the total price "381.90 USD" is displayed.

The checkout process is broken into seven segments:

- o General
- o Shipping
- o Billing
- o Accounting Codes
- o Internal Notes and Attachments
- o External Notes and Attachments
- o 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

General ?

These values apply to all lines unless specified by line item

Cart Name	2015-07-22 ma484 01	<input type="button" value="edit"/>
Description	<i>no value</i>	
Prepared by	Michele Arias	
Prepared for	Michele Arias	
3-Way Match	✘	
Validate FOMPROF Access	✘	
Pcard Transaction - Do Not Pay	✘	

For selected line items

Telrose Corporation [more info...](#)

PO Purchasing 2
3801 Ridge Ave, Philadelphia, PA 19132-1839 US

Product Description	Catalog No	Unit of Measure	Unit Price	Quantity	Ext. Price	
1 Office Depot(R) Brand ImagePrint(R) FSC Certified Multiuse Paper by Domtar, 8 1/2 x 11, 20 Lb, White, 500 Sheets Per Ream, Case Of 10 Reams more info...	617206	CS	38.19	10 CS	381.90 USD	<input type="checkbox"/>
General (same as header)						
Supplier subtotal					381.90USD	

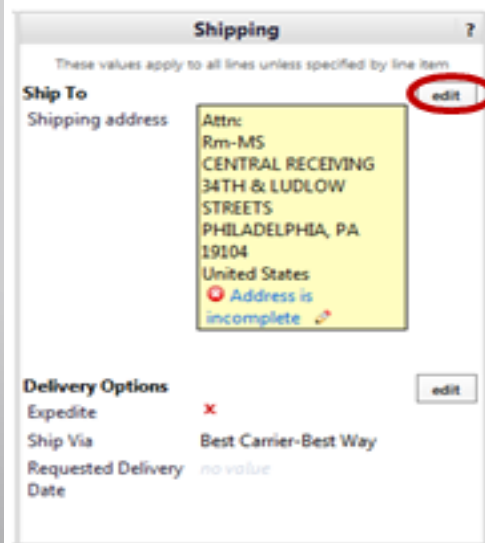
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal	381.90
Total	381.90 USD

Section 2- Shipping

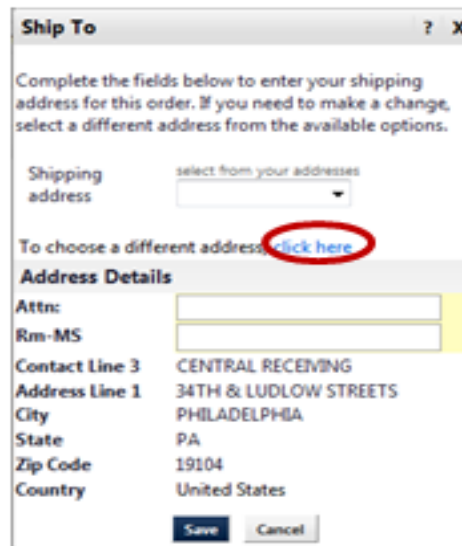
- This section allows you to indicate where the order should be delivered

To edit your shipping address:
Select the edit button



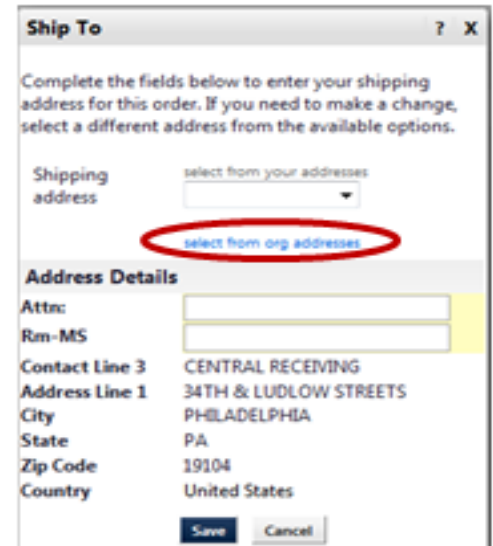
The screenshot shows a 'Shipping' dialog box with a title bar containing a question mark and an 'X' icon. Below the title bar, it says 'These values apply to all lines unless specified by line item'. Under the 'Ship To' section, there is a 'Shipping address' field containing the address: 'Attn: Rm-MS CENTRAL RECEIVING 34TH & LUDLOW STREETS PHILADELPHIA, PA 19104 United States'. A red circle highlights the 'edit' button to the right of the address field. Below the address field, there is a 'Delivery Options' section with 'Expedite' set to 'x', 'Ship Via' set to 'Best Carrier-Best Way', and 'Requested Delivery Date' set to 'no value'. A second 'edit' button is located at the bottom right of the dialog box.

From this screen you can select from addresses saved in your profile or search for any Drexel address by selecting *click here*



The screenshot shows a 'Ship To' dialog box with a title bar containing a question mark and an 'X' icon. Below the title bar, it says 'Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.' Under the 'Shipping address' field, there is a dropdown menu with the text 'select from your addresses'. A red circle highlights a 'click here' link below the dropdown menu. Below this, there is an 'Address Details' section with fields for 'Attn:', 'Rm-MS', 'Contact Line 3', 'Address Line 1', 'City', 'State', 'Zip Code', and 'Country'. The 'Save' and 'Cancel' buttons are at the bottom.

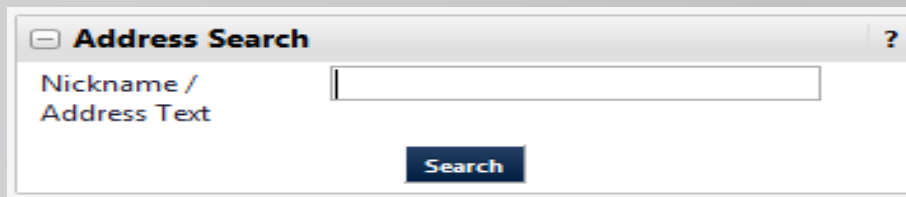
Then, click *select from org addresses*



The screenshot shows a 'Ship To' dialog box with a title bar containing a question mark and an 'X' icon. Below the title bar, it says 'Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.' Under the 'Shipping address' field, there is a dropdown menu with the text 'select from your addresses'. A red circle highlights a 'select from org addresses' link below the dropdown menu. Below this, there is an 'Address Details' section with fields for 'Attn:', 'Rm-MS', 'Contact Line 3', 'Address Line 1', 'City', 'State', 'Zip Code', and 'Country'. The 'Save' and 'Cancel' buttons are at the bottom.

Section 2- Shipping

- A new window will appear for an address search:



Address Search

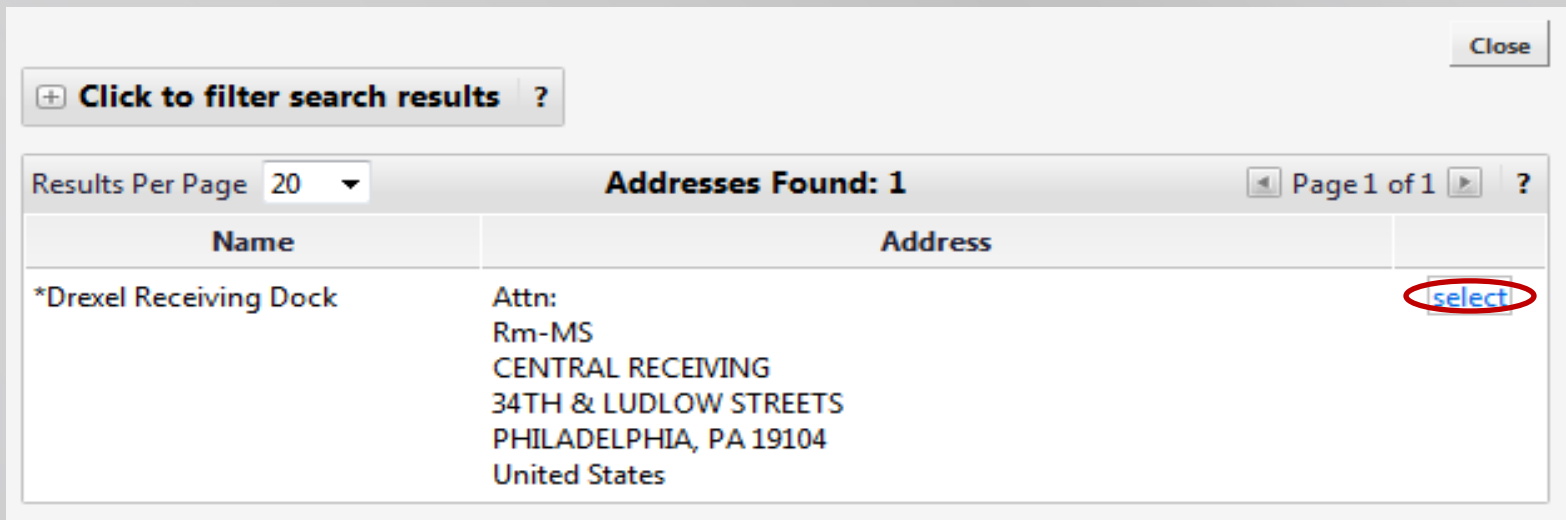
Nickname /
Address Text

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 to filter search results ?

Results Per Page 20 ▼ Addresses Found: 1 Page 1 of 1 ?

Name	Address	
*Drexel Receiving Dock	Attn: Rm-MS CENTRAL RECEIVING 34TH & LUDLOW STREETS PHILADELPHIA, PA 19104 United States	select

- 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

Ship To ? X

Complete the fields below to enter your shipping address for this order. If you need to make a change, select a different address from the available options.

Shipping address select from your addresses

select from org addresses

Address Details

Attn: John Smith

Rm-MS Stratton 225

Contact Line 3 CENTRAL RECEIVING

Address Line 1 34TH & LUDLOW STREETS

City PHILADELPHIA

State PA

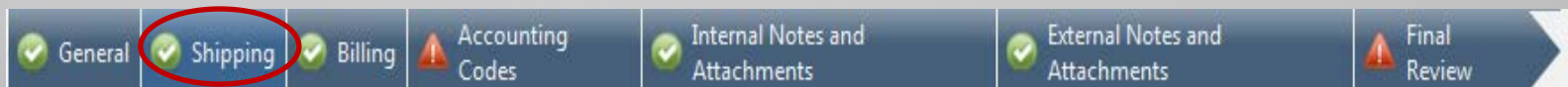
Zip Code 19104

Country United States

Save this address for future use

Save Cancel

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

Billing ?

These values apply to all lines unless specified by line item

Bill To		<input type="button" value="edit"/>
Billing address	Accounts Payable 3141 Chestnut St PHILADELPHIA, PA 19104 United States	
No credit card has been assigned.		<input type="button" value="edit"/>
Billing Options		<input type="button" value="edit"/>
Accounting Date	<i>no value</i>	

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**

Accounting Codes ?

These values apply to all lines unless specified by line item

Chart	Fund	Organization	Account	Activity	
D Drexel University	110001 Education & General	3231 Procurement Services	no value Required field	no value	edit

- You will then see the Accounting Codes box

Accounting Codes ? X

Select from your code favorites

Chart	Fund	Organization	Account	Activity	
<input type="text" value="D"/> Select from profile values... Select from all values...	<input type="text" value="110001"/> Select from profile values... Select from all values...	<input type="text" value="3231"/> Select from profile values... Select from all values...	<input type="text"/> Select from profile values... Select from all values... Required field	<input type="text"/> Select from all values...	add split

recalculate / validate values

Save **Cancel**



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

Accounting Codes

Select from your code favorites

Chart	Fund	Organization	Account	Activity	add split
<input type="text" value="D"/> <small>Select from profile values... Select from all values...</small>	<input type="text" value="110001"/> <small>Select from profile values... Select from all values...</small>	<input type="text" value="3231"/> <small>Select from profile values... Select from all values...</small>	<input type="text" value="3011"/> <small>Select from profile values... Select from all values... Required field</small>	<input type="text"/> <small>Select from all values...</small>	

[recalculate / validate values](#)

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

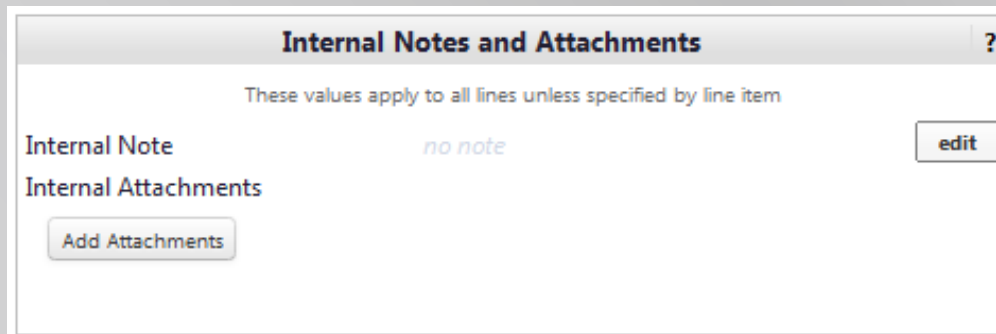
General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Final Review

[Go to Express Checkout](#) [Return to shopping cart](#) [Conti](#)

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](#).

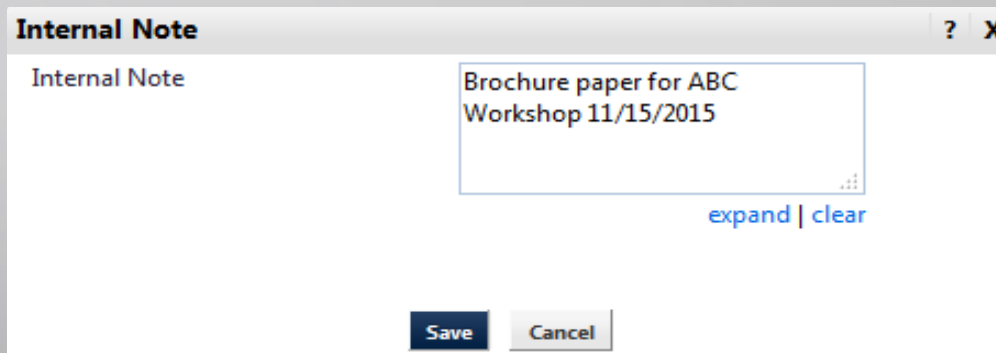
Section 5- Internal Notes and Attachments

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



The screenshot shows a dialog box titled "Internal Notes and Attachments" with a help icon (?) in the top right corner. Below the title, it states "These values apply to all lines unless specified by line item". The "Internal Note" field contains the text "no note" and has an "edit" button to its right. Below this, the "Internal Attachments" section has an "Add Attachments" button.

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



The screenshot shows a dialog box titled "Internal Note" with help (?) and close (X) icons in the top right corner. The "Internal Note" field contains the text "Brochure paper for ABC Workshop 11/15/2015". Below the text area are "expand" and "clear" links. At the bottom of the dialog are "Save" and "Cancel" buttons.

Section 5- Internal Notes and Attachments

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

Internal Notes and Attachments

These values apply to all lines unless specified by line item

Internal Note no note [edit](#)

Internal Attachments

[Add Attachments](#)

Add Attachments

Attachment Type File Link

File *

[Select files...](#)

Maximum upload file size: 9.77 MB

* Required

[Save Changes](#) [Close](#)



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

External Notes and Attachments ?

These values apply to all lines unless specified by line item

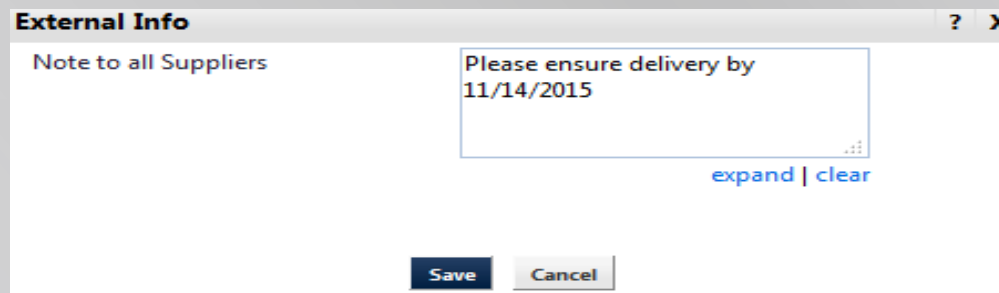
Note to all Suppliers *no note* edit

Attachments for all suppliers

Add Attachments

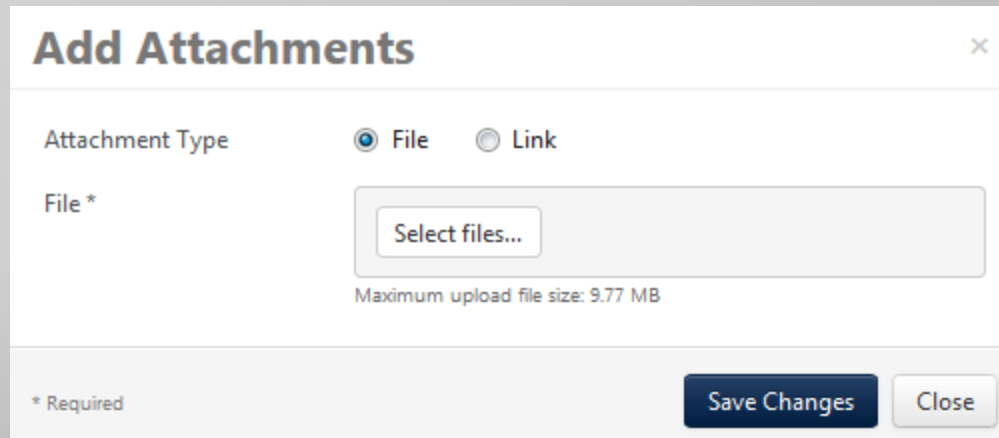
Section 6- External Notes and Attachments

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



The screenshot shows a dialog box titled "External Info" with a close button (X) and a help button (?). The main content area is titled "Note to all Suppliers" and contains a text input field with the text "Please ensure delivery by 11/14/2015". Below the input field are the links "expand" and "clear". At the bottom of the dialog are "Save" and "Cancel" buttons.

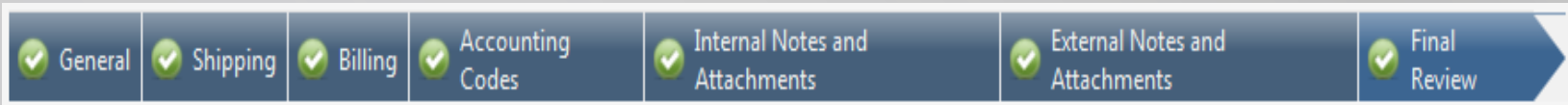
- Clicking **Add Attachments** will allow you to add documents



The screenshot shows a dialog box titled "Add Attachments" with a close button (X). The "Attachment Type" section has two radio buttons: "File" (selected) and "Link". Below this is a "File *" label and a "Select files..." button. Underneath the button, it says "Maximum upload file size: 9.77 MB". At the bottom left, there is a "* Required" note. At the bottom right, there are "Save Changes" and "Close" buttons.

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.***