



Checking Out

Depending on your approval limit you will have one of the following checkout options:

Within limit: The requisition will approve, the system will create it into a purchase order and either the system or a colleague will approve the order.

Outside Limit: You will have to forward it to a colleague for approval. Once approved by a buyer the system will create it into an approved order.

- If the order was to a Marketplace supplier it will be automatically sent to the supplier
- If it is a Non-Catalog order it should be printed to PDF and sent to the supplier

Regardless of which check out method, you must ensure that the correct account code and tax codes are used. In addition to this you can also specify different Need-By dates, location codes, split cost of an item over a variety of codes, add notes to Non-Cat suppliers and add attachments.

Pre-Requisite

Items in your shopping cart

Please note:

Marketplace suppliers systems are unable to cope with the direct transmitting of Marketplace orders where there is more than one type of VAT e.g. paper at SR20% and a book at NO-UK VAT to the same supplier. Please ensure Marketplace orders to the same supplier do not have mixed VAT items. A separate requisition must be raised.

1. Select the **View Cart and Checkout** button with items in your cart to open the shopping cart window.

Shopping Cart			
Your cart contains 1 line.			
Recently Added Lines			
Table	1	EA	
View Cart and Checkout			



Shopping Cart: Requisition Information

Shopping Cart

* Description

* Deliver-To location

* When do you need these items?

TIP Home Delivery - Do not provide personal data such as home address to suppliers via email. Personal data should only be entered at checkout when attaching the text note to supplier.

Tax Classification Code

TIP If manually entering a tax code, you MUST press Tab to ensure it is selected

Hide Delivery and Billing

Delivery

* Requester

Billing

Project

Task

Award

Expenditure Type

Expenditure Organization

Expenditure Item Date

Charge Account

GL Date

Line	Item Description	Supplier Item Number	Unit	Quantity	Price	Amount (GBP)	Delete
1	<input type="text" value="Table"/>		EA	<input type="text" value="1"/>	<input type="text" value="50 GBP"/>	50.00	
Total						50.00	

1. Amend the **Requisition Description** if need-be. It's purely for your information only.
2. **Need-By date** will default in from Preferences set up.
3. **Deliver-To Location** will default in from Preferences set up. If any data needs to change then manually amend it here by entering dept code and then tabbing. **Quick select** the relevant code.
4. **Tax Classification Code** More often than not it will say SR20%, which relates to all items in your cart. If tax code varies for the items in your cart, refer to **Edit Lines** on page 4. Refer to separate guidance on tax codes.
5. **Requester** will default in with the name of the person raising the requisition. If you are raising on behalf of a colleague you may be able to search and enter their name (but only if they are a CUFS user).



Billing

6. Information will vary here depending on whether you set codes in Preferences or Personal Profiles and whether you are coding to Projects or departmental account.

a. **Coding to projects**

i. If you set up **Project Information** in **Preferences** then the information will default in the Project, Task, Award, Expenditure Type, Expenditure Organization fields.

ii. If you didn't do the preferences set up, complete the fields either manually entering the information or using the torch to search to enter the project you are coding all the expenditure of this cart to.

iii. Complete **Expenditure Item Date**

b. **Coding to a Department account (charge account field)**

Changing the GL coding (or to code each line separately) is done at the checkout stage.

7. From the shopping cart screen click on **Approve and Checkout** to display the Checkout: Requisition Information screen.

Shop | Requisitions | Receiving

Home | Favourites | Non-Catalog Request

Edit and Submit Requisition 2598524 Check Funds | Refresh | Save | Printable Page | Submit

* Indicates required field

Total 50.00 GBP

* Description Table

Additional Information

* Bill to location

Select Lines: Update Copy Delete +...

Details Line	Item Number	Description	Quantity	Unit	Price	Amount (GBP)	Need By Date	Deliver-To Location	Medical Exempt Equipment	Medical Exempt Use	Delete
<input type="checkbox"/>	1	Table	1	EA	50	50.00	21-Oct-2024 00:00:00	PD			<input type="checkbox"/>
						Total	50.00				

ⓘ TTP Computer software and licences may be medically exempt if they are solely for use in medical research, diagnosis or treatment. This category is more restrictive than for qualifying equipment as it does not include any veterinary use or medical training use.
ⓘ TTP Select a line and click on the Update button to Track as Asset or to allocate costs to multiple projects.

Based on your approval authority, this requisition does not require approval by others.

Approvals Manage Approvals

No Approvals Required

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found										

8. **Bill to location**

This will typically be either XX or XXSSF (with the Xs replaced with your two letter department code..

9. **Attachments**

To upload an attachment for a particular item, use the Add Attachment button at the bottom of the screen. A window will open enabling you to upload a file.

10. To update the coding information, tax information or to track an item as an asset, tick the box beside the item and select Update.



11. **Tax Classification Code** This can be adjusted to update the tax for the item being updated. Remember you must not mix vat rates for Marketplace orders.
12. **Accounting Flexfield** The accounting flexfield can be updated to code the item to a GL code.
13. **Grant information** The Project, Task, Award, Expenditure type, Expenditure Organisation, and Expenditure Item Date and be filled in to code the item to a grant.
14. **Track as Asset** If the item qualifies as an asset (item £5,000 or more remaining within the University for at least one year), enter a **Y** into the Track As Asset field.
15. Select **Apply** to commit any changes to the item. If you have multiple items in your cart you will need to repeat steps 10-14 as necessary.

Warning – If you select the tick box at the bottom of the window, the system will override the transaction codes for all items.

Submitting Requisition: Within your Approval limit

Once you have clicked on **Submit**, the requisition will approve and either a colleague will autocreate it into an order or the system will create a purchase order per supplier in your cart. If it is to a Marketplace supplier the system will transmit it directly. If it is a Non-Catalog supplier the system will print it, as long as the Personal Profile set up was completed, then fax it to supplier. You will receive emails advising you of the relevant purchase order numbers.

Please note: If you receive an email advising you that the '*Requisition no longer exists*', no action is required. This is due to the timing difference between the system generated notification emails advising you that the requisition is approved and the subsequent purchase order/s have been approved. The email can be ignored as it has no impact on the requisition or order.



Forwarding your Requisition: Outside Approval Limit

- 16.1 Click **Manage Approvals** and type in the surname of the colleague you wish to send it to in the Approver field (your colleagues approval limit must be higher than yours!), tab and name will default in unless there is more than 1 individual with that name, in which case **Quick Select** the relevant name.

Approvals

[Manage Approvals](#)

→ No Approvals Required

Notes And Attachments

Notes

Note To Buyer

Requisition Attachments

[Add Attachment](#)

Seq	Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.										

[Return to Shopping](#)

16.2 **Submit**

- 16.3 If you want to add more than 1 approver, click on **Manage Approvals** again and repeat step 8.2. You can **Add to Location** if you wish to change the order of approvers.

- 16.4 You can add a **Note To Buyer** and **Add Attachment** for the entire cart.



Attachments to suppliers (i.e. Category: To Supplier) can only be used for non-catalog orders. Supplier attachments for Marketplace orders will not be transmitted with the order

- 16.5 Click **Submit**. The requisition will now be sent to the relevant people in the order you stipulated for approval, they will receive an e-mail notification and it will display in their My Notification screen.