

## 1. Review the Shopping Cart

Review the items in your shopping cart, then click “Proceed To Checkout”

Shopping Cart ▾ 2021-05-19 asheline 01

Simple Advanced

Search for products, suppliers, forms, part number, etc.

1 Item

Airgas USA LLC. · 1 Item · 4,000.00 USD

SUPPLIER DETAILS PO Purchasing 2 : 2600 Northland Drive, Elkhart... ▾

Details ▾  
For Abigail Maines  
Estimate (4,000.00 USD) ▾  
Total: 4,000.00

Proceed To Checkout

Assign Cart

## 2. Correct Issues

On the right hand menu, the fields that need correcting will be listed. Each error is a hyperlink you can select to go directly to the issue that needs to be fixed.

Draft

✘ Correct these issues. ▾  
You are unable to proceed until addressed.

Required: Organization  
Invalid value: Program  
Invalid value: Req Type  
Required: Grant Review

Total (4,000.00 USD) ▾

## 3. Codes and FOAPAL Section

The Codes and Foapal section is the primary place that modifications will need to be made. You can modify these fields by clicking the pencil icon

Codes and FOAPAL ✎ ... ▾

Accounting Codes (FOAPAL)

Chart	Fund	Organization	Account	Program	Activity	Location
1 Notre Dame	100000 Educational and General	no value Required	72001 Supplies	70000 General Administration Invalid value	no value	no value

Custom Codes

Req Type Standard PO  
Invalid value

Grant Review no value  
Required

## 4. Update FOAPAL

Under the FOAPAL section, you will fill in every field of the FOAPAL you are using. To add a FOAPAL split, you will click the small plus icon that appears when hovering over the FOAPAL fields. To re-calculate once you have processed a split, click the checkmark icon that is located next to the plus icon.

Activity Location

Search Search

+ ✓ ♥

## 5. Update Custom Codes

Under the custom codes section, you will click the small arrow on each of the fields to open a drop down menu and select an appropriate value for the “Grant Review” and the “Commodity Code” sections.

The screenshot shows the 'Accounting Codes (FOAPAL)' section with three input fields: Chart \*, Fund \*, and Organization. Below these is the 'Custom Codes' section, which includes 'Req Type \*' and 'Grant Review \*'. A dropdown menu is open for the 'Grant Review \*' field, listing options: Profile Values, 10 - 10 - Richard Forrester, 15 - 15 - Vicky Flesher, 20 - 20 - Donna Sheer, 25 - 25 - John Engel, 35 - 35 - Joe Quinn, 40 - 40 - Greg Schaefer, No Grant Review, and Organization Values. The 'Grant Review \*' field has a red 'Required' indicator and a pencil icon to its right.

## 6. Verify Shipping Address

Verify the shipping address listed on the requisition. If you need to make a change, click the pencil icon to modify the address.

The screenshot shows the 'Shipping' section with a pencil icon and a dropdown arrow. Below is the 'Ship To' section with the following address: Contact Name Abigail Sheline, Dept. Name Procurement, CR1, Grace Hall, 700 Grace Hall, Building GRAC, Notre Dame, IN 46556, United States.

## 7. Add Attachments

If attaching documents to go to the supplier such as a quote or an invoice, you will click “add” next to the supplier attachments section.

The screenshot shows the 'Supplier Info' section with various fields: Shipping Instruction (no value), Contract/Quote No. (no value), PS Contact (no value), Note to all Suppliers (no value), Accounting Date Override (no value), Attachments for all suppliers (Add), and Additional Notes or Clauses? (Add). The 'Add' button for attachments is highlighted with a red box.

## 8. Submit Requisition

When you have confirmed all of your fields are input, you will see that the “Submit Requisition” button has turned blue. You can then click this which will initiate the process of the requisition going through the workflow

The screenshot shows a 'Draft' summary with a total of 4,000.00 USD. The subtotal is 4,000.00. The final total is 4,000.00. A blue 'Submit Requisition' button is highlighted with a red box, and an 'Assign Cart' button is visible below it.