



BuyUSI

Cart Forward Guide

What is Cart Forward?

The Cart Forward feature allows designated users (such as summer interns or graduate assistants) to shop the BuyUSI catalogs and fill a cart with the items needed. This feature may also be used for non-catalog requests. The cart is then forwarded to another user for purposes of completing the transaction (FOAP, workflows, etc.) and approving the purchase.

STEP ONE:

Requestor will create a transaction:

The screenshot displays the eSM interface for a transaction. At the top, the University of Southern Indiana logo is on the left, and the user name 'Hi Julie Weinzapfel' and the eSM logo are on the right. Below the header, there are navigation tabs for 'Shop' and 'Approve (0)'. A search bar is present with the text 'Search Keyword(s), Item Numbers, etc.'. To the right of the search bar, there is a cart icon showing 'Cart 0' and a total of 'Total: 0.00 USD'. Below the search bar, there are links for 'Go to: All Transactions | Non-Catalog Items'. The main content area is divided into two sections: 'Checkout' and 'Transaction Summary'. The 'Checkout' section includes a table with details for General, Delivery, Billing, GL, Line Item, and Workflow. The 'Transaction Summary' section provides key information about the transaction, including the number, date, supplier, requester, and total value.

Checkout		
General Details		Change
✓ Delivery Details	Attn : Julie Weinzapfel, SSB Room 142	Location : Default Location Change
✓ Billing Details	Attn : acctspay@usi.edu	Location : (Please include PO # on all invoices) Change
GL Details		Change
Line Item Details (Total: 1)		Change
View Workflow Details		Change

Transaction Summary	
Transaction #:	154506
Create Date:	11/04/2019
Supplier:	Ameristamp Sign-A-Rama
Requester:	Julie Weinzapfel, SSB Room 142
Selection:	Active
Status:	Unsubmitted Transaction
System Note:	None
Total Line Items:	1
Subtotal:	5,000.00
Total Value (USD):	5,000.00

Transaction Name

STEP TWO:

Requestor will fill out the General Details section of the transaction:

Checkout    


General Details

Payment Form: PO

Release Method:

Order Type:

Purchase Order #: 21489

Fiscal Date:  [reset](#)

* Description:

* Business Purpose:

Vendor Email/ Fax #:

Quote #:

Requestor will fill in each field under General Details.



STEP THREE:

Delivery Details:

The "Ship To-Attn" field defaults to the requestor. If the shipment should be sent to someone other than the requestor, make that change under Delivery Details:

Delivery Details

* Ship To - Attn: Julie Weinzapfel, SSB Room 142

Default Location:

Default Location

8600 University Blvd
Evansville, IN 47712

812-464-1799

Search: Type location name

Continue

Click "Continue" to save the change and move to the next section.

STEP FOUR:

Billing Details:

This is a default field, click "Continue" to proceed.

Billing Details

* Bill to Attention:

Default Location:

(Please include PO # on all invoices)

Attn: acctspay@usi.edu
Accounts Payable
PO Box 18158
Evansville, IN 47719

812-461-5422


Recently Used Locations:

Default Location

Attn: Dan Martens
8600 University Blvd
Evansville, IN 47712

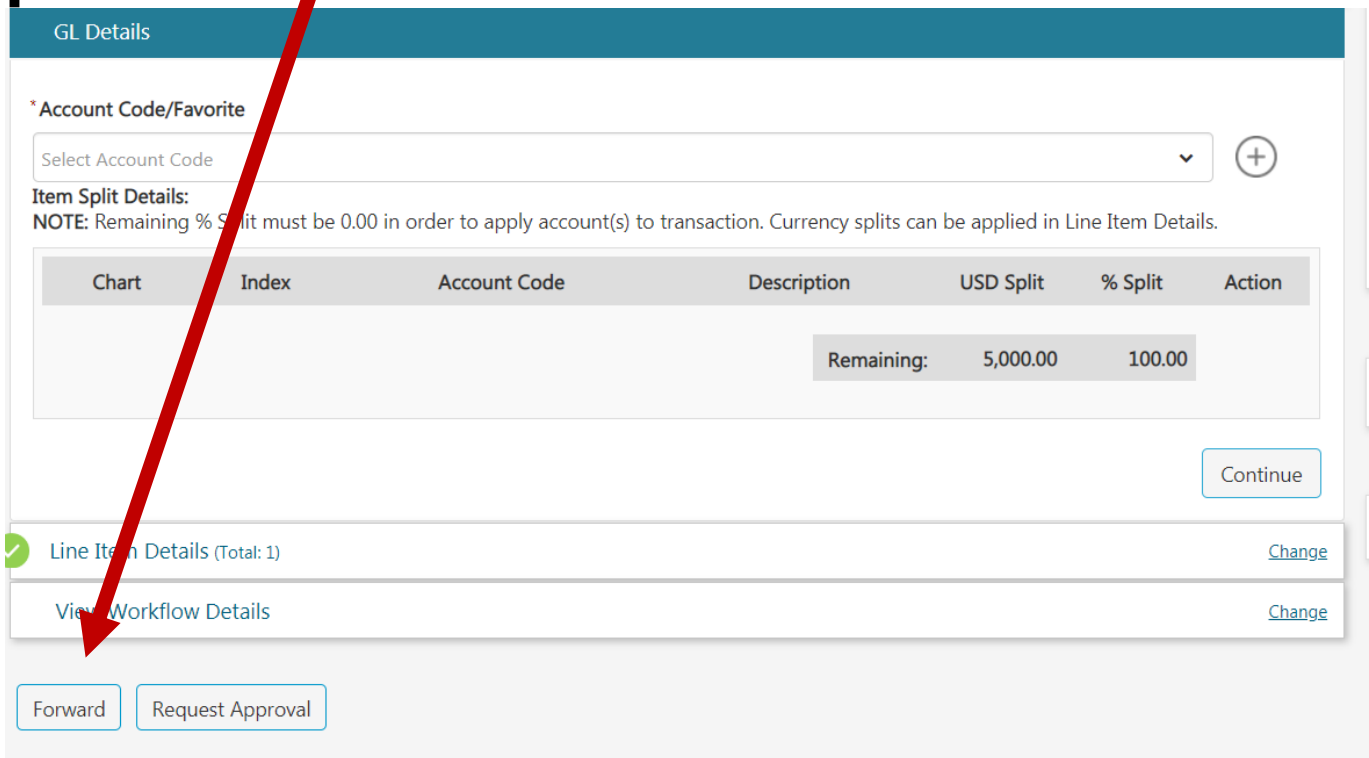
812-464-1799

Search:



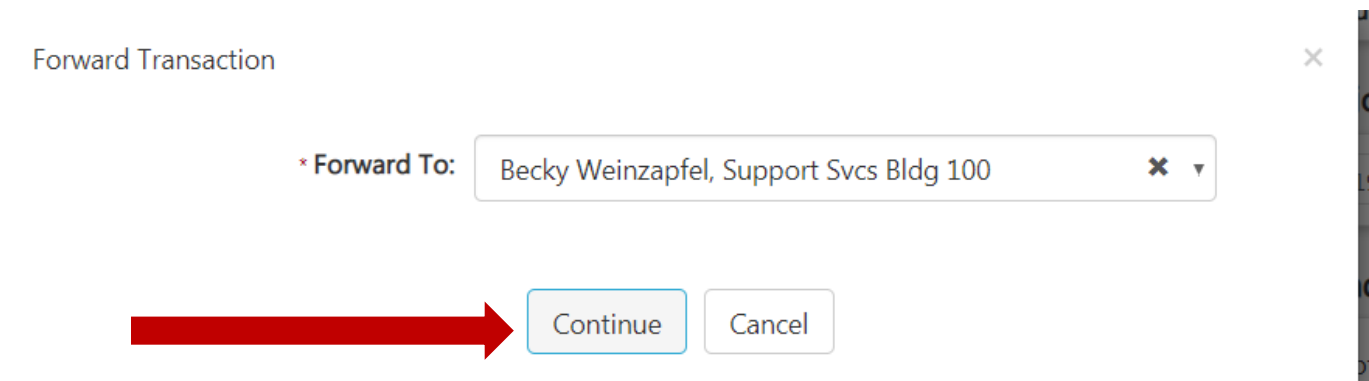
STEP FIVE:

Click on "Forward" to begin the cart forward process.



The screenshot shows a 'GL Details' form. At the top is a teal header with the text 'GL Details'. Below it is a dropdown menu labeled '* Account Code/Favorite' with the text 'Select Account Code' and a plus icon. Underneath is the 'Item Split Details' section, which includes a note: 'NOTE: Remaining % Split must be 0.00 in order to apply account(s) to transaction. Currency splits can be applied in Line Item Details.' Below the note is a table with the following columns: Chart, Index, Account Code, Description, USD Split, % Split, and Action. The table contains one row with the text 'Remaining: 5,000.00 100.00'. To the right of the table is a 'Continue' button. Below the table are two sections: 'Line Item Details (Total: 1)' with a 'Change' link, and 'View Workflow Details' with a 'Change' link. At the bottom of the form are two buttons: 'Forward' and 'Request Approval'. A red arrow points from the top left towards the 'Forward' button.

A new window will pop up allowing the requestor to enter the name of the person they will forward the cart to:



The screenshot shows a 'Forward Transaction' dialog box. It has a title bar with the text 'Forward Transaction' and a close icon. Below the title bar is a dropdown menu labeled '* Forward To:' with the text 'Becky Weinzapfel, Support Svcs Bldg 100' and a close icon. Below the dropdown menu are two buttons: 'Continue' and 'Cancel'. A red arrow points from the left towards the 'Continue' button.

Click continue to proceed.

Requestors will receive notification that the transaction has been forwarded:



Requestors can refresh their screen to remove the transaction from view.

Once the cart has been forwarded, the person who initiated the transaction can no longer see the transaction. The person who receives the cart through the cart forward function becomes the requestor for the transaction. They will complete the transaction and request approval. The transaction will become part of their checkout history.