



Spartan Marketplace Checkout Process

Overview: This job aid demonstrates how to perform the Checkout Process in Spartan Marketplace, including setting and or verifying Accounting, Deliver To, Ship To, and Organization information. Setting Deliver To, Accounting, and Org Favorites will save time and streamline the checkout process.

1. Before placing an order on the Spartan Marketplace **Checkout** page, review the editable fields for each order.

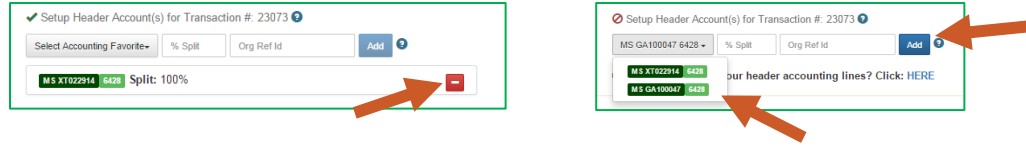
The screenshot displays the checkout interface for transaction # 23073. It includes a summary box with requester 'Joe Sparty', create date '06-04-2015 09:48:43 AM', supplier 'OFFICE MAX', and total '\$97.70'. Shipping information is set to 'BERKEY HALL' with address 'Rm/Ste 101, 509 E CIRCLE DR, EAST LANSING, MI 48824'. The 'Deliver To - Attn' field is populated with 'Joe Sparty', email 'joesparty@msu.edu', and phone '517-355-1855'. Accounting setup shows 'M 5 GA100047 6428' with a 100% split. A link 'Need to customize your header accounting lines? Click: HERE' is visible.

2. **Deliver To:** A user can add, review, and/or update the Deliver To information for an order. Spartan Marketplace will populate the default Deliver To Address and Deliver To Attention information if a user has this set up in their Profile.
 - a. Change a Deliver To address by clicking on the drop-down arrow, which displays all addresses saved in the Profile Favorites.
 - b. Adding a new—or updating an existing—Deliver To Address can be completed in the Profile Favorites section. See the Favorites Deliver To Job Aid for additional guidance.
 - c. **Note:** The Deliver To Address applies to all lines of an order.
3. **Accounting Setup:** A user can add, review, and/or update the Accounting information for an order. Accounting information can be captured at either the header level (applies to all lines of the order) or at the line item level (unique accounts for each line item of the order).
 - a. **Header Level:** The default Accounting Setup view is at the header level.
 - i. An Account Number (if set up in Profile Favorites) will default to 100% distribution.
 - ii. Add a new Account Number for use at the header level by selecting the **Need to customize your header accounting lines? Click HERE.**
 - iii. Users can enter accounting information to locate the desired Account number and click **Add** to assign the number to the order. Select **Add to Favorite** to save the information.

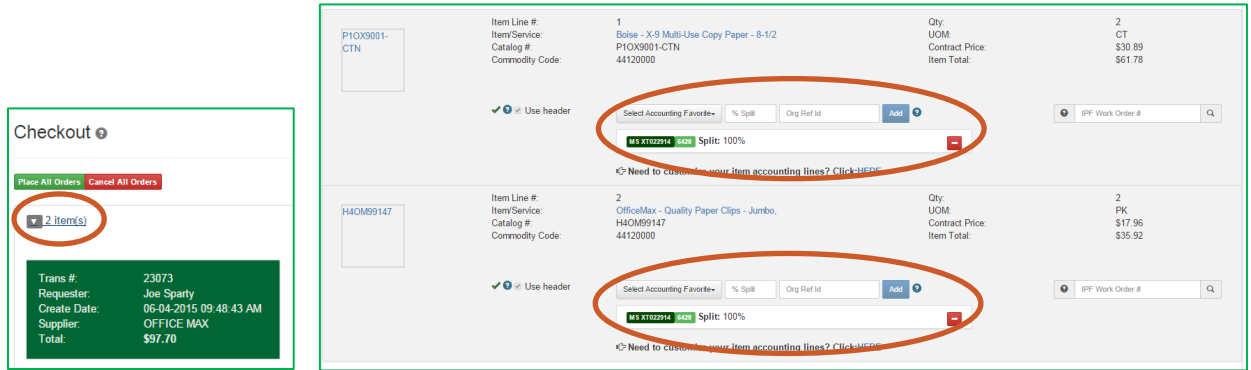
This close-up shows the 'Enter Header Accounting Line(s) for Transaction 23073' form. It features search fields for 'Account', 'Sub Account' (containing '6428'), 'Sub Object', and 'Project Code'. There is an 'Add' button on the right and an 'Add to Favorite' checkbox at the bottom. A link 'Need to customize your header accounting lines? Click: HERE' is at the top left. Red arrows point to these three key elements.



- b. **Split Account Distribution:** Change the accounting distribution at the header level.
 - i. Click the red subtract button to remove the default account number
 - ii. Select an **Account Number** from the **Accounting Favorite** dropdown and assign a percentage distribution
 - iii. Continue this process until the desired accounting information and appropriate split distribution is completed. Total distribution must equal 100%.



- c. **Line Item Level:** Users can also enter different Accounting information at the line item level.



- i. Click on the **Arrow and number of Items** link on the Checkout Page to expand the view.
 - ii. Accounting information can be changed in the same way as the header level.
- d. **Accounting Validation:** A check is displayed to indicate that the Account Number(s) is valid and account distribution percentages total 100% either at the header or line item level. Invalid information will display a red "X."

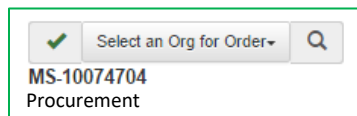
Item #	Accounting Status
1	✓
2	✓

- 4. **Ship To Selection:** Review and select the Ship To address. Spartan Marketplace will default to University Stores at 166 Service Road, East Lansing, MI address for all users. However, users can access the **Select Ship To** drop down menu and select any of the other available addresses.

- a. **Note:** The Ship To Address only applies at the header level of an order.

- 5. **Org for Order Selection:** Add, review, and update the Organization Code. Spartan Marketplace will populate the default Org Code if a user has this set up in their Profile. The Org for Order only applies at the header level.

- a. Users can change the Org Code by clicking on the **Select an Org for Order** dropdown arrow to display all Org Codes saved in Profile Favorites.



- a. Adding a new—or updating an existing Org Code—can be completed in the Profile Favorites section. Please see the Favorites Organizations Job Aid for additional guidance.



- c. Add Org Codes directly in the Checkout screen by clicking on the magnifying glass. In the Organizational Search window, users can find an Org Code via the Code or Organizational Name. Once the desired Org Code is located, click on **Apply** to populate the Org Section.

Organization Search

Organization Code Organization Code Organization Name Organization Name

Apply Search Close

- 6. **IPF Only: IPF Work Order # Selection:** IPF users can add a **Work Order #** for the order that will apply at the header level (all items) or at the line item level.
 - a. Click on the magnifying glass to bring up the IPF Work Order Search window and find a Work Order # via the Number or Work Order Description.

IPF Work Order #

- b. Click **Apply** to populate the number in the IPF Work Order # Section of the order. Please see the IPF Work Order Number Job Aid for additional guidance.

IPF Work Order Search

Work Order Number Work Order Number Work Order Description Work Order Descrj

Apply Search Close

- 7. Once the information has been verified, place the order(s) by selecting the **Place This Order** button or **Place All Orders** button.
 - a. **Note:** Multiple orders from multiple suppliers in the can be in the cart at once. A single order can be cancelled by selecting the **Cancel This Order** button or, to cancel all orders, select the **Cancel All Orders** button.