Requisitioner Training Manual

Larry McWilliams
Procurement Department
lmcwill@kent.edu

Revised December 2018
Introduction

The purpose of this training guide is to familiarize the user with FlashCart, Kent State’s e-procurement system. This guide is broken down into five sections:

1. **Logging into FlashCart**
   a. Registering as a New User
   b. Site Navigation
   c. View and Update User Profile
   d. User Identification
   e. Update Personal Settings
   f. Review Roles and Permissions
   g. Setting up E-mail Preferences
   h. Setting up "Ship To" Addresses
   i. Review User Profile History
   j. Setting up Credit Card Information

2. **Searching for Items**
   a. Searching and Shopping Techniques
   b. Punch Out and Hosted Catalogs
   c. Search Results
   d. Search Results Details
   e. Additional Search Functionality

3. **Shopping Carts and Checkout**
   a. Adding Items to the Cart
   b. Removing Items from the Cart
   c. Updating Items in the Cart
   d. Reviewing Line Item History
   e. Deleting Shopping Carts
   f. Creating New/Draft Carts
   g. The Checkout Process
   h. Populating Header Details
   i. Populating Line Item Details
   j. Reviewing the Workflow Process
   k. Submitting the Shopping Cart
   l. Copying Previous Requisition to a New Cart
   m. Placing Orders for Other Users

4. **Reviewing and Exporting History**
   a. Reviewing My Requisitions
   b. PR Search by PO Number
   c. PR Search by Requisition
   d. PO Search by PO Number
   e. PO Search by Supplier/SKU
   f. Search Exports and Exporting Purchasing and Invoicing Data
FlashCart Overview

FlashCart is Kent State University's eProcurement product. FlashCart allows requisitioners to shop for office and other supplies electronically. FlashCart connects to hosted and punchout vendor catalogs, customized vendor’s websites and provides an electronic means of purchasing from any desired vendor through several forms. FlashCart will also track department purchases with a “one-button” reordering feature, along with many other valuable features that will make ordering supplies simple and effective.

Logging Into FlashCart

You will be accessing FlashCart through FlashLine.

Follow these steps to log into FlashCart:

1. Go to www.kent.edu and click the FlashLine portal link:

2. Then, log into FlashLine using your FlashLine ID and Password.
3. Once in FlashLine, select FlashCart from the Dashboard:
**Registering as a New User**

To register all new users (Shoppers, Requisitioners and Approvers) should call the Procurement Department at extension 22276 or email procurement@kent.edu with the following information:

- Full Name
- Username (FlashLine ID)
- Phone
- Department
- Role (Shopper, Requisitioner, Approver)

The FlashCart System Administrator will then create a basic profile for you which you can later customize.

**Site Navigation**

The navigation tabs that show up across the top of your screen are dependent on your role and your permissions. You may not have access to all of the tabs described below.

The following screen shots show you the various areas of FlashCart navigation on the Home Page.

*(Continue to following page.)*
1. **User Information**: The user's name, a link to the user's profile, cart summary, quick search bar, and the logout link are located here.

2. **Navigational Charms**: Quick links to various FlashCart operations. (Each function is covered later.)

3. **Product Search**: Use this feature to search for products within the hosted and punchout catalogs. To use this feature, product search criteria must be keyed in. Clicking the Go button executes the search and displays the results in the appropriate search results screen. Also quick links to Advanced Search, Favorites Forms, and Quick Ordering; and Supplier, Category and Contract browsing (if permitted).

4. **Bulletin Board**: Posts of important Procurement Department information and news may be found here. Updated periodically.

5. **Catalogs**: Of catalogs there are two types:
   a. **Hosted**: an online version of a supplier's printed catalog.
   b. **Punchout**: links to suppliers' web-based catalogs.

6. **Forms**: Forms are used in FlashCart to purchase items which are not listed in Hosted and Punchout catalogs.

7. **Logout**: Log out of the system by clicking this button, or simply by clicking the “X” at the top right corner of the browser.

**Shopping**

There are three (3) types of shopping in FlashCart:

1. **Punchout Catalogs**: Punch Out catalogs are links to suppliers' web-based catalogs. You will actually exit FlashCart to search and select your products within the supplier's customized website. When you checkout, you are then returned to your FlashCart cart automatically. The selected items are then submitted through the standard requisition/order process.

2. **Hosted Catalogs**: A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product details with contracted pricing information, if applicable. When you search within FlashCart, products in all of the hosted catalogs are searched. Search results contain product information from all hosted suppliers depending on the search criteria you entered.

3. **Forms**: Forms are used in FlashCart to purchase items which are not listed in Hosted and Punchout catalogs. Customized forms have been created to accommodate specific types of requests for Kent State University.
   - There are eight (8) types of forms available in FlashCart. They are:
     - Non-Catalog Form
     - Change Request Form
     - Computer, Software and IT-Related Items Form
     - Direct Pay/Invoice Attached Form
     - External or Consultative Services Form
     - Live Animals Form
     - Shipping and Handling Form
     - Temporary Signage
View and Update User Profile

Select the Profile link in the User Information section of the Home Page to access your user profile screen.

User profile screens are grouped into tabs and each tab has its own sub-set of tabs. Information relating to your settings and permissions are accessed from this screen.

When you access your profile, the User Identification screen will display. The User Settings sub-sets include:

User Profile and Preferences

Basic user information such as name and contact information are maintained through the User Profile. You can edit all information except for your username.

Follow these steps to update your User Identification:

1. Either select the Profile Tab in the Navigation Menu to access your user profile screen or click the profile link in the application header.
2. From the User Profile and Preferences tab → User’s Name, Phone Number, Email, etc. sub-tab, edit any of the information that you would like to change. Editable information includes Phone Number Department, and Position.
3. Click the Save button.

Language, Time Zone and Display Settings

Follow these steps to update your Language, Time Zone and Display Settings:

1. Either select the Profile Tab in the Navigation Menu to access your user profile screen or click the profile link in the application header.
2. From the User Profile and Preferences tab → Language, Time Zone and Display Settings sub-tab, edit any of the information that you would like to change. Editable information includes Language, Country, Currency, Time Zone, Color Theme, Preferred email format, etc..
3. Click the Save button.
Default User Settings

Default User Settings includes several fields, which are all optional for user setup. These include Custom Field and Accounting Defaults, Default Addresses, Cart Assignees (only applicable for Shoppers), and Payment Options.

For purposes of this manual, only Default Addresses and Payment Options will be covered, as they are the most commonly used options in this section.

- **Default Addresses**

  Address information is required to place orders in FlashCart. The shipping address identifies where the supplier should send the item(s) you order, and the billing address identifies where the invoice should be sent post-delivery. The information you enter here will become your default ship-to and bill-to address but they can be changed when you place your order.
Follow these steps to update your "Ship To" address:

1. Navigate to the profile screen.
2. Select the Default User Settings tab, then single-click on the Default Addresses sub-tab. Then the Ship To sub-tab displays.
3. Press the Select Addresses for Profile button on the upper-right hand of the screen. A drop-down box will display:
   a. Expand the Select Address Template drop-down box.
   b. Select the desired address.
   c. Review the address information and make any changes or additions. Required fields are indicated in bold. Please note: The format for the Contact Name Field is **Room Number, Department, Last Name, First Name**.
   d. Check the Default checkbox if this address is the desired default Ship To address.
   e. Click the Save button.

Follow the same steps for the “Bill To” address.

- **Payment Options**

You can set up your P-Card information by selecting this tab. It is recommended that you do not activate the “apply the default card” checkbox; if default is selected all of your purchases will automatically be processed as a P-Card purchase. However P-Card limits are still effective and orders over $2,500 will automatically be rejected.
Follow these steps to set up your credit card information:

1. From the profile screen select the Default User Settings tab, then select the Payment Options sub-tab. Any card numbers that have been set up will display on the right side of the screen.
2. Click the Add a New Card button.
3. Enter the credit card information. Note: The credit card number will be masked so it cannot be viewed online after it has been entered.
4. Give the P-Card you are entering a Nickname. Enter the Cardholder Name, Card Number, Card Security Code and Expiration Date. If you want this P-Card to be your default card, activate the Default checkbox. (See qualification stated above.)
5. Click the Save button.

User Roles and Access

Please note that you can only view your roles and permissions in FlashCart and cannot edit this information. Only a system administrator can update this information. Please contact the Procurement Department at 2-2276 or by E-mail at procurement@kent.edu for clarification of your identified role.

Follow these steps to review your role(s):

1. Navigate to the Profile screen.
2. Select the User Roles and Access tab, and then the Assigned Roles sub-tab.

Please note: Whereas the illustration above is an administrator screen, your view will be relegated to “Assigned Roles” only.

Common roles:

- **Shopper**: A user who “shops” or sources catalog or non-catalog items for purchase on behalf of his/her department, but who does not assign account codes to shopping carts, and whose shopping cart is subject to review and preliminary approval of a corresponding requestor.
- **Requestor**: A user who “shops” or sources catalog or non-catalog items for purchase on behalf of his/her department, assigns account codes to shopping carts, and places orders for purchase.
- **Approver**: A user who is responsible for financial approvals of purchase requisitions in FlashCart.
Notification Preferences

The Notification Preferences screen is used to determine when and why you will receive email and/or system notifications. Please note: You must set these settings yourself. At the very least be sure to select "PR Rejected" and "PO Rejected" by clicking in the checkbox for these options.

Follow these steps to set up your Notification Preferences:

1. Navigate to the profile screen.
2. Select the Notification Preferences tab, and then select the Shopping Carts & Requisitions sub-tab. The options available to you are based on your permissions.
3. Decide which notifications you would like to receive as an email and/or as a system notification by clicking the Edit Section link at the top right hand corner of the screen, clicking the Override radio button, and selecting the preferred choice.
4. Press the Save Changes button.

Ordering and Approval Settings and Permission Settings

These are hard-coded defaults based on your roles. These cannot be changed except by a system administrator.
User History

An audit trail of changes made to your profile is available. This is a view-only screen.

Follow these steps to view your personal Profile History:

1. Navigate to the Profile Screen.
2. Select the User History tab.
3. You can view the following information:
   a. **Date**: The date and time a change was saved.
   b. **User**: The user who made the change.
   c. **Action**: The action the user took; this is typically creating or modifying information.
   d. **Section**: Displays the section of the user profile that the change(s) took place.
   e. **Selection**: If applicable, the area or value added.
f. **Field:** If applicable, the specific field the user modified.
g. **Old Value:** If applicable, the value prior to the change.
h. **New Value:** If applicable, what the value was changed to.

4. The History tab allows you to filter the audit trail based on specific criteria. To filter data:

a. Click on the “Click to filter history” tab at the top of the screen.
b. Enter the filter criteria to determine what information displays, then click Apply. The historical data will refresh.

5. You may also use the “Page X of X” lateral scroll tabs to navigate through all pages of information.

**Search for Items**

**Searching and Shopping Techniques**

This section is to teach you the various ways to search for items in FlashCart. The following is a list of these techniques:

- **Search by Keyword:** When you search by a keyword you can enter the product description, category, supplier name, manufacturer name, catalog number, manufacturer's number and other key product descriptors to find the product you are searching for.
- **Browse by Supplier:** You are able to filter your results by browsing by supplier.
- **Browse by Category:** You can view all item from all suppliers for a specific category (commodity).
- **Punch Out Shopping:** Punch-Out Shopping allows you to search in an external supplier's customized website while shopping for items. Any selected items are placed into FlashCart's cart for further processing.
- **Antibody Resource:** Parametrically search for antibody products by selecting host, species reactivity and other product attributes.
- **Quick Order:** If you have the exact catalog number for the supplier or manufacturer, you can use Quick Order to add automatically the item into your cart.
- **Favorites:** You can store frequently ordered and preferred items in your Favorite.
- **Product Comparison:** Product Comparison allows you to view side-by-side comparisons of similar items. This option can be utilized once items have been selected while in your cart.

**Punch Out and Hosted Catalogs**

A catalog is a vendor's product offering. There are two types of catalog - hosted and Punch Out:

- **Hosted Catalog:** A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product details with contracted pricing information, if applicable. When you search within FlashCart, products in all of the hosted catalogs are searched. Search results contain product information from all hosted suppliers depending on the search criteria you entered.
- **Punch Out Catalog:** Punch Out catalogs are links to suppliers' web-based catalogs. You will actually exit FlashCart to search and select your products within the supplier's customized website.
When you checkout, you are then returned to your FlashCart cart automatically. The selected items are then submitted through the standard requisition/order process.

Search Results

The purpose of this section is to describe the search results presentation.

The Order of Search Results

There are numerous factors that determine the order in which products are returned in your Search results. The search engine determines the initial sort. Supplier and Category preferences, if used, determine the final listing.

The terms entered in your search are used to determine the most relevant products. Depending on the search entry field used, different rules are applied:

- **Must include the word(s):** Only products containing all of the words entered are considered as search results.
- **Include any of the word(s):** Products containing any of the words entered are considered as search results.
- **Include exact phrase:** Only products containing the phrase entered in the exact order expressed are considered as search results.
- **Exclude the word(s):** Any product containing the words entered are eliminated from consideration.
- **Other fields:** Search tokens entered in the other available fields such as Supplier Name are treated as if they are the only field(s) populated and they are treated like the "Must include the word(s)" search.

Products with the greatest number of matching words are ranked higher than those with fewer. For example, if four words are entered into the include any of the words field, the product containing all four are ranked higher than those containing three.

Search Results display at the lower portion of the screen. The following are some examples from the Search Results:

- **Product Sorting:** By default, products are presented as described above. In addition, products can be sorted by several means by clicking the icon and selecting the method you prefer by using the drop-down menu.
- **Icon Definition:** Both products descriptions and supplier names may have icons next to them. The Legend link at the top and bottom of the Search Results launches a pop-up that explains each of the icons. You can also mouse-over the icon to view the text description.
- **Adding Items to Your Cart:** To add items from your Search Results into your cart, enter the Quantity, then click the button.
- **Adding Items to Your Favorites:** You can also add items from your search results to your favorites.
• **Comparing Items in Search Results** - From the search results, product details can be compared. Simply choose the Compare Products options in the action drop-down and then click the button.

• **Access Additional Pages** - To page through search results, use the arrow buttons or page entry field to go to a specific page of search the results. This information will be displayed above and below the search results.

Follow these steps to shop for items using the Standard Search:

1. Go to the Product Search field.
2. The standard search displays the first time Product Search is opened. After that, FlashCart will remember your last search setting (standard or advanced).
3. Enter the keyword or keywords you are searching for in the box.
4. Click the Go button to view search results.
Using the drop-down menu to the left of the free form field and searching by these specific categories can help reduce the number of products from appearing in your Search Results.

To shop using these categories follow these steps:

1. Go to the Product Search field.
2. Once the Product Search drop down menu tab is selected, one or more vertical(s) display on the left side of the screen in the Categories section.
3. Select the vertical containing the product of interest (such as Furniture) by clicking it; the vertical will highlight when selected.
4. Enter your keywords to find the desired item
5. Click Search to display search results.

It is also possible to search by Supplier and Category in FlashCart.

Searching by Supplier

Follow these steps to shop by Supplier:

1. Go to the Product Search field.
2. Select the Browse by Supplier link. The Browse by Supplier search window will display.
3. Search and locate the supplier whose products you would like to review.
4. To view all suppliers, click the Search for Supplier Filter link, then choose All from the drop-down list.
5. From the list of suppliers, select the supplier you want to view by clicking on the appropriate link in the Supplier Name column. The Supplier details and category listings display. You can also drill down into the categories by expanding/collapsing the categories until you locate the desired sub-category.
6. Once you find the category you are looking for you can click on the view button to view the items for the supplier.

Searching by Category

Follow these steps to shop by Category:

1. Go to the Product Search field.
2. Select the Browse by Category link. The Browse by Category search window will display.
3. Search and locate the category whose products you would like to review.
4. To view all categories, click the Search button.
5. From the list of categories, select the category you want to view by clicking on the appropriate link in the Category column. The category listing will display. You can also drill down into the categories by expanding/collapsing the categories until you locate the desired sub-category. Follow steps 6 from above to continue.

Punch-Out and Hosted Catalogs

Punch-Out Shopping allows you to search in an external supplier’s customized website while shopping for items. When accessing a Punch Out supplier via FlashCart, you are automatically authenticated. Thus, the supplier’s website knows you are shopping on behalf of Kent State University and will display contracted pricing if applicable.

Follow these steps to use a Punch Out:

1. Go to the Product Search field.
2. Below the keyword search area, the Punch-Out section is available where all the available Punch-Out suppliers are shown.
3. Click the supplier icon. The browser is redirected to the supplier's customized website.
4. To cancel the Punch Out, select the button at the top of the screen.
5. If you need more time you can extend the session by resetting the session duration using the
button.

6. Once within the Punch Out site, you can use the search tools available via the supplier to search for your items. Once you are finished, check out of the Punch Out site and the products will be placed in your FlashCart shopping cart automatically.

**Additional Search Functionality**

**Quick Order**

Quick Order is used when the exact product catalog number (SKU) is known. Both the supplier and manufacturer part numbers are searched when using Quick Order.

If the catalog number entered is an exact match to a product in the hosted catalogs, and there is only one match, the product is automatically added to your shopping cart. If an exact match is not found or more than one product is found, Search Results display allowing for you to make your selection.

Follow these steps to use a Quick Order

1. Open the Quick Order tab from either the Home or Product Search tab.
2. Enter the catalog numbers in one or more of the Catalog #/SKU fields and click the Add to Current Cart button. Note: Do not forget to activate the Include Similar Terms checkbox.
3. If the catalog number entered is an exact match to a product in the hosted catalogs and there is only one match, the product will automatically be added to your shopping cart. If there is more than one match, results are presented. If no search results are found, you will receive an error.

**Refining Search Results**

If the Search Results presented are too broad or not what you desired, they can be modified without starting over. The initial keywords used for the search can be added to, removed, or modified as needed.
Follow these steps to refine your Search Results using the filter functionality:

1. Search for products using any of the search tools we have discussed in this training guide. As always, search results display at the bottom of the screen.
2. To refine the result set by supplier, select one of the suppliers from the By Supplier table in the upper left-hand of the screen (see above).
3. To refine the result set by supplier class, select one of the suppliers from the By Supplier Class table in the upper left-hand of the screen (see above).
4. To refine the result set by category, select one of the categories from the By Category table in the upper left-hand side of the screen.
5. To refine the result set by packaging, select one of the suppliers from the By Packaging table in the upper left-hand of the screen (see above).
6. To refine the result set by manufacturer, select one of the suppliers from the By Manufacturer table in the upper left-hand of the screen (see above).
7. To modify, add or delete keywords, select the Expand to refine search link to open Product Search.
8. From the Product Search screen, enter new keywords, modify/delete existing keywords, and/or change verticals. Click Search to display the new search results.
9. After refining the search, the updated search path will display.
Using the Comparison Function

Side-by-side comparisons are a good way to help you decide which product to purchase. The Compare function allows you to compare two or more products via a side-by-side attribute comparison of each product. This also allows you to determine the best pricing by auto-calculating prices based on Unit of Measure or Product Size. This feature cannot be used for the Punch Out suppliers.

Follow these steps to use the Compare function:

1. Search for products.
2. On the right hand side of the Search Results, select two or more items by clicking the “compare” link for the products to be compared.
3. Select Compare Selected from the drop-down list either above or below your search results. The Product Comparison screen displays and replaces the search results.
4. The Product Comparison page lists, vertically, all the products selected for comparison. Product attributes are shown on the left side of the page. From here to remove a product from the compare page, click on any of the links indicated in bold text, for more information, determine the pricing breakdown using the Price per Product Size Unit field, click the more info link to view a detailed product description, and if available, a graphic of the item (indicated by the camera). If you wish to add an item to your cart, enter the quantity in the Quantity field, click the Add to Cart button, click the Back to Search Results button to return to the original search results and cancel the product comparison.

5. To remove a chosen item from a comparison, click the “remove” link.

**Forms**

Forms are used in FlashCart to purchase items which are not listed in Hosted and Punchout catalogs. Customized forms have been created to accommodate specific types of requests for Kent State University.

There are eight (8) types of forms available in FlashCart. They are:

- Non-Catalog Form
- Change Request Form
- Computer, Software and IT-Related Items Form
- Direct Pay/Invoice Attached Form
- External or Consultative Services Form
- Live Animals Form
- Shipping and Handling Form
- Temporary Signage

Follow these steps to find a form:

1. From either the Home or Product Search tab, click on the Forms tab and you will see the forms that are available for your use.

**Using Forms**

Forms are used to order goods and services that do not fit into the hosted catalog model, such as business cards. Forms also allow you to input additional information that must be delivered to the supplier.

To use a Form, follow these steps:

1. Using either the Home tab or Favorites tab, click on the Forms tab.
2. Select the appropriate form from My Forms or Organization Forms.
3. Enter the optional and required information on the form. Required fields are in bold.
4. Once the form is filled out, select the Add to Current Cart action from the drop-down, and then click the Go button.
5. The form's item, goods, or services are added to the shopping cart. If necessary, you can edit the form from the cart by clicking on the form name in the cart.

Entering Non-Catalog Items

Non-Catalog forms are used to order items and supplies that are not offered by suppliers with Hosted or Punch Out catalogs.

Follow these steps to use a Non-Catalog Form:

1. Open the Non-Catalog Form. You can access the form from the Quick Order tab, Product Search tab or Forms tab.
2. From the Non-Catalog Item form, click the Search button in the Supplier Info section. The Supplier Search screen displays.
3. Enter the supplier's name in the appropriate field and click the Search button. The supplier or list of suppliers will display. (NOTE: Directions for a new vendor follow this section)
4. Select the radio button next to the desired supplier fulfillment center, and click the Choose Selected Supplier button. The Non-Catalog Item form is populated with the selected supplier. If there is more than one supplier, the default will be in bold.
5. Fill in required and optional fields. Required fields are in bold.
6. When you have completed the form, select the Add to Current Cart action in the drop-down and click the Go button.
7. The item is added to the shopping cart. You can edit the non-catalog item once added to the cart by clicking on its name in the cart.

Change Request Form

- A Change Request Form is used whenever a change must be made to an existing PO.

Computers, Software and IT-Related Items Form

- Similar to the Non-Catalog form, but strictly used for IT purchases.

Direct Pay/Invoice Attached Form

- The Direct Pay/Invoice Attached Form is used whenever an invoice precedes a PO. This should only be used on an exception basis.
- This form can and should be used instead of check requests for payment of invoices for which no PO was issued.

External or Consultative Services Form

- The External or Consultative Form is used whenever a service is requested through FlashCart.
Live Animal Form

- The Live Animal Form is used whenever live animals are to be purchased.

Shipping and Handling Form

- The Shipping and Handling Form is a special form to be used whenever shipping and handling is itemized on a quotation.

Temporary Signage

- This form has vendor-specific routing and is used for the purchase of temporary signage.

Using a New Vendor

![Image of form](https://solutions.sciquant.com/apps/Router/FavoritesFormEdit?&FavoriteProductId=3652373&WantReloadOnClose=1&FakePageContext=2&trac...)

**Non-Catalog Form**

- **Supplier Info**
  - Enter Supplier:
    - New Supplier
    - New Supplier

- **General Info**
  - Form Type: Non-Catalog Form
  - Product Description
  - Quantity
  - Packaging (UDM)
  - Estimated Price

- **Configurable Fields**
  - Health and Safety
    - Controlled substance
    - Recycled
    - Hazardous material
    - Radioactive
    - Rad Maker
    - Select Agent
    - Taint
    - Energy Star
    - Green

- **FAERS Reference No.**
- **Sole Source**
- **Sole Source Instructions**

- **Internal Info**
  - Please include below any notes or attachments that would help in processing your request.
Follow these steps to use a new vendor:

1. Search for and select the supplier named New Supplier.
2. Fill in all of the required information in the form.
3. In the Note to Buyer field enter the name of the vendor, the address of the vendor (including city, state and zip code) and the phone number of the vendor.

**Shopping Carts and Checkout**

Shopping carts contain the items you have selected to purchase. Shopping carts contain line items that represent items, goods, or services being acquired through FlashCart.

**Adding Items to the Cart**

Items can be added to your cart through many of the screens in FlashCart. Listed below are the different places where products can be found:

- Product Search Results
- Product Details Popup
- Product Comparison
- Home Page Favorites
- Quick Order
- Punch Outs
- Favorites Page
- Completed Requisitions

The following steps will help you learn how to add items to your cart from the various locations listed above. While shopping, the Cart button in the upper right corner will automatically update to reflect the total quantity and cost of items in the cart.

Follow these steps to add items from the Product Search Results Page:

1. Search for products using one of the various methods mentioned earlier.
2. To add a single item to the cart, indicate the desired quantity and click the Add to Cart button.
3. If you wish to add multiple items to the cart:
   a. Indicate the desired quantity for each item.
   b. Place a check in each item's Select checkbox.
   c. Select Add to Current Cart from the drop-down list, then click the Go button.
   d. If items appear across multiple pages of the search results, you can do one of two things: Add the items from the first page and then repeat the process for the following pages.
or perform the search over again except change the number of products that display per page.

Follow these steps to add items from the Product Description Popup:

1. Search for products using one of the various methods mentioned earlier
2. Click on an item's Product Description to open its Product Details popup.
3. Set the desired quantity and click the Add to Cart button

Follow these steps to add items from Product Comparison:

1. Open the Product Comparison screen. From here you can do one of two things:
   a. Click the Add to Cart button for a single item or
   b. Place a check in the desired items' Select checkboxes and choose Add to Current Cart in the Action drop-down list

Follow these steps to add items from Favorites on the Home Page

1. The Home page defaults to the last tab you have visited. Select the Favorites tab.
2. From the drop-down folder, select the folder from which to choose the desired products.
3. Select the products to add to your cart.
4. Press the Add to Current Cart button. In this instance, the system does not provide a message detailing the number of items added to the cart, it only updates the Cart button details.

Follow these steps to add items from Quick Order

1. Select the Quick Order tab and search for an item.
2. If Quick Order finds an exact match it will automatically add the product to the cart. The system also provides a comprehensive message about what was added, including Catalog Number, Description, and Supplier. The item's quantity will always populate as 1.
3. If FlashCart finds multiple items that meet the search criteria, the system will present the standard Product Search Results screen.

Follow these steps to add items from Forms

1. Select the Forms tab.
2. Choose either the Non-Catalog Form from the Form Options section or another. Form in the Forms section and complete the form's required information.
3. Select Add to Current Cart from the Action drop-down list.
4. The system adds the form to the cart and redirects your view to the cart.

Follow these steps to add items from Punch Outs

1. Select the Product Searches tab and select an active Punch Out.
2. FlashCart will redirect you to the supplier's Punch Out site.
3. Search for product(s) and add product(s) to your cart within the supplier's Punch Out (will vary from Punch Out to Punch Out).
4. Use the supplier's feature to return products to FlashCart (will vary from Punch Out to Punch Out). The Check Out feature will most likely be used.
5. When you return to FlashCart you will be on the cart page.

Follow these steps to add items from a Completed Requisition:

1. Select the Order History link.
2. Find a completed requisition. Click on the Requisition Number within the Order Search Results.
3. Select Copy to New Cart from the Action drop-down list and click Go.
4. FlashCart automatically creates a new cart and adds those items to your new cart.
5. In this instance FlashCart will not provide a message detailing the number of items added to the cart; instead it will take you directly to the new cart.

Removing Items from a Cart

Items can be removed from shopping carts either individually or all at once. FlashCart allows the removal of items from the cart regardless if the item is from a Form, a Punch Out, a Hosted Catalog.

Follow these steps to remove selected items from a Cart:

1. Navigate to the shopping cart with the item(s) you want to remove.
2. Select the item(s) you wish to remove by placing a check in the Select checkbox.
3. Choose Remove Selected Items from the Action drop-down list and click the Go button. FlashCart will remove the selected item(s) and will update the Cart button totals.

Follow these steps to remove all items from a Cart:

4. Navigate to the shopping cart with the item(s) you want to remove.
5. Choose Remove All Items from the Action drop-down list and press Go.
6. A confirmation popup will open. Choose OK to remove all of the items or Cancel to stop the process.
7. If you choose OK, FlashCart will remove all of the items.

Updating Items in the Cart

Once products have been added to your shopping cart, it may be necessary to change some of the information such as quantity or unit price.

Follow these steps to update the quantity of a Hosted Catalog Item:

1. Open your shopping cart with the Hosted Catalog item in question.
2. In the Qty/UOM field modify the desired quantity.
3. Click the Save Updates button at the bottom of the page. The Total at the bottom of the page and the Cart button will both update with the revised amounts.

Follow these steps to update the Unit Price on an Item from a Form (Access via the Cart):

1. Open your shopping cart with the Form in question.
2. Click on the Product Name in the row for the Form.
3. The completed Form will open.
4. Update the Price Estimate field with the correct value.
5. Select Save to Shopping Cart from the Action Drop-Down list.
6. The form refreshes on the screen and the Cart button totals update based on the new price.
7. Click on the Cart button to return to the current cart.

**Reviewing Line Item History**

The Line Item History feature allows you to view all purchases of the same item within a specified date range. Being able to view recent purchases can help prevent unnecessary or duplicate purchases. This feature only applies to Hosted Catalog and Punch Out items.

Follow these steps to review a line item's purchasing history:

1. Add Hosted Catalog or Punch Out items to a shopping cart.
2. Access the shopping cart.
3. For the items in question, select the Line Item History button.
4. The Line Item History popup will open up.
5. If no previous purchases are found, a message that no items were found will display.
6. Previous Purchases Found: An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including Quantity, Date, User ID and User email address.

**Deleting Shopping Carts**

FlashCart has no restrictions on the number of draft shopping carts that can be created. When a shopping cart is no longer needed, FlashCart allows you to delete the entire shopping cart with one click.

Simply follow these steps to delete a draft shopping cart:

1. Click the Shopping Cart button in the upper right-hand corner to access the active cart.
2. Select the draft carts sub-menu under the carts main menu access the list of existing draft shopping carts.
3. Find the cart to delete.
4. Press the Delete button on the right-hand side of the screen.

**Creating New/Draft Carts**

New carts can be created in FlashCart whenever necessary. Draft carts can be created for future use.

Follow these steps to create a new cart and to navigate through a draft cart:

1. Go to the Orders section and choose the option to create a new cart.
2. Name the cart.
3. Search for and add a product(s) to the cart.
4. Return to the Orders section and create a second cart. Give this cart a new name.
5. In the Orders section, select the option to view drafts. Each cart will be listed. To make a different cart active, do one of the following:
   a. To change the current cart to another listed cart but still remain in the drafts page, click on the Current Cart icon.
   b. To change the current cart to another listed cart and go to the newly selected cart, click on the Shopping Cart Name.

Checking Out

The checkout process is detailed through the Orders navigation tab. By going to the orders section of FlashCart, you will notice the following buttons on your screen. The buttons represent the activities required to complete and process your order.

- **Add Products**: Allows you to continue shopping within FlashCart.
- **Edit Cart**: Provides a high-level look at the items selected to purchase and header information such as priority, accounting date, user name, and header-level internal and external attachments. You can also remove or edit line items from here.
- **Review**: Be sure to review and update the required information, including Shipping information, Billing information, Accounting Code, and each line item's information.
- **PR Approvals**: This is a read-only diagram of the workflow detailing the process the requisition must follow prior to PO creation.
- **PO Preview**: This allows you to see a snapshot of what the PO will look like when processed.
- **Place Order**: This button is used to begin the checkout process. It will start the approval process, send the order to Banner, create and deliver a PO to each supplier.

Populating Header Details

When creating a requisition, you can add various details to the Header Information section, such as Priority, Internal Notes and Accounting Date. This gives you the ability to ensure that the requisition is handled properly.

Simply follow these steps to Populate Header Details:

1. Go to your active cart.
2. The initial screen presented is the Edit Cart screen. Some, or all, of the fields will be available on the screen:
   - **Priority**: Allows you to indicate if the requisition is Urgent. This flag will allow approvers to view the order's urgent status.
   - **Description**: Allows you to add a brief description for the requisition.
   - **Prepared for**: Allows you to prepare the requisition for a different user.
   - **Internal Note**: Allows you to add a detailed note to the requisition that is viewable by approvers as the requisition goes through the workflow. Internal notes are not sent to the supplier.
   - **Attachments**: Allows you to attach files in various formats or links to websites. These will be viewable by approvers, but will not be sent to the supplier.
   - **Note to All Suppliers**: Allows you to add a detailed note to the requisition which will viewable by approvers and will be sent to the supplier along with the PO.
   - **Accounting Date**: Allows you to associate an accounting date with the requisition.
3. Click the Save button to save the header information.

**Populating Line Item Details**

In a requisition various details such as Ship To address, accounting codes, etc. can be associated with each line item. FlashCart will utilize the default values set up in your profile section. You can modify the values—per line item—as needed, including adding splits to the accounting if desired. This allows you to ensure that each line item has the appropriate information.

Follow these steps to Populate Line Item Details:

1. Click the Review button across the top of the window.
2. Click the Hide Header button to show line item information only. Click on Show Header to display Header information. This option is located in the upper left-hand side of the window.
3. Scroll down to the Supplier/Line Item Details area of the screen. The current selections display for each line item and are grouped by supplier. To modify a line item selection:
4. Click the View/Edit by line item...link as shown below or click the button to make changes.
5. Depending upon the specific field in question, a drop-down list of all available values or a free form field will appear. In addition, you can add values from your profile.
6. To edit specific information for the requisition, use the tabs across the top of the cart screen. (shipping, billing, etc.)
7. Scroll down to make changes to specific line items.
8. The following is a list of common “sections” on a cart, along with a description of each:
   - **Bill To**: This section displays the address to which the invoice will be sent by the supplier.
   - **Ship To**: This section displays the address to which the item will be shipped by the supplier.
   - **Delivery**: This section displays the delivery preferences such as shipping carrier, shipping date, and expedite flag.
   - **Credit Card Number**: This section displays any credit card to which the line item has been allocated.
   - **Supplier Information**: This section displays any information that needs to be conveyed to the supplier, such as Pricing Code, Account Code and Note.
   - **Codes or Accounting Codes**: This section displays the values within Kent State University's chart of accounts in which the purchase is expensed.
9. When making edits to sections of the cart at the line level, you must scroll to the appropriate line and section, then click the edit link.
10. Line level notes: After creating line level notes, internal or external, you can copy this information to additional lines by selecting the copy to other lines link.
11. When modifications are made at the line level, the system will indicate this by displaying the unique information. Otherwise you will see the header text.

**Reviewing the Workflow Process**

FlashCart provides a visual representation of the workflow or approval process for a purchase requisition. Each step in the process is represented by a box, along with a description of the process or step. The steps displayed can either be a manual step requiring approval by a group of approvers or a specified approver (financial approver) or a system step that is automated, such as checking Banner for authentication of the creator.
Follow these steps to review the Workflow Process:

1. Open your shopping cart.
2. Complete all required information for your cart.
3. Click on PR Approvals after all the required information is entered. This will allow you to review the requisition approval process.
4. Review the workflow process.
5. Click on the label for the workflow step in question to display the help information.

**Submitting the Shopping Cart**

FlashCart validates your cart for proper completion of cart details and, if necessary, will prompt you to correct/edit appropriate fields.

Follow these steps to submit a shopping cart:

1. Open your shopping cart.
2. After you review and update your order, click on the Place Order button. If there are errors, the Review page will display with an error message in red font against a yellow background. A specific error message is also displayed next to specific field(s) for each affected line item. You can edit the values and click on Place Order again to submit your order.

**Copying Previous Requisitions to a New Cart**

You can easily copy requisitions to a new cart in order to re-order the line(s). Items can be removed or additions can be made as well when the in cart. This procedure is commonly done when orders are rejected or there is a problem with the order.

Follow these steps to copy a previous requisition to a new cart:

1. Access the Documents History tab.
2. Identify the specific requisition that needs to be copied.
3. Click on My Requisitions button and choose the appropriate requisition.
4. Click on PR History, perform a PR search, and click on the appropriate requisition number within search results.
5. Select the Copy to New Cart action from the Available Actions drop-down box.
6. Select the Go button. A new shopping cart is created and all line item(s) and requisition custom information are copied to the new cart. You will be directed to the Save Updates section of the new cart.
Reviewing and Exporting History

With FlashCart, you are able to review and export historical data from purchase requisitions and purchase orders.

Reviewing My Requisitions

You can find all of your submitted requisitions under My Requisitions in FlashCart.

Follow these steps to review My Requisitions:

1. Access My Requisitions from either the Home tab or the History tab. Your requisition history will display.
2. Each column can be sorted by clicking on the small white triangle under the column name. The default sort order is the Requisition Date/Time column.
3. You can choose to view requisitions by status by choosing a selection from the Status dropdown.
4. Click the Requisition Number to access the specific requisition.
PR Search by PO Number

You can locate Purchase Requisitions generated in FlashCart by using purchase order information. You can either search for a single purchase requisition or a group of purchase requisitions based on your search criteria.

Follow these steps to search for a PR by PO Number:

1. Go to the Document History charm in the site navigation bar.
2. Select the PR History sub-menu.
3. From the Purchase Requisition Search page, click the PO Number tab. If you know the PO number, you can search by this number, otherwise you can search several other ways from this point. Your first step will always be to click the Filter checkbox:
   a. My Orders and Company Orders
   b. Start Date and End Date
   c. User
   d. PR Departments
   e. PR Status
4. Click the Search button. Your results will display.
5. From the PR Search Results screen, you can do the following:
   a. Click the New Search button to perform a new search
   b. Click the Save Query button to name and save your search criteria.
   c. Click the Select Query button to run a saved query.

PR Search by Requisition

Purchase Requisitions created in FlashCart can be found by using either the requisition name or number in your search criteria. You can search for a single purchase requisition or a group of requisitions as well.

Follow these steps to Search for a PR by Requisition:

1. Go to the Document History charm in the site navigation bar.
2. Select the PR History sub-menu.
3. Click the By Requisition tab.
4. Enter the requisition number in the Requisition Number field OR
5. If you know part of the name of the requisition, enter it in the Requisition Name field. The search results will include all PRs that start with the text entered in the field.
   - Click on the Filter checkbox and enter any of the information in the fields that are available.
6. If you want to save your search, click the Save Query button. You will be prompted to name your query.

PO Search by PO Number

Purchase Orders created in FlashCart can be located by using various PO details. You can search for a single PO or a group of POs as well.
Follow these steps to Search for a PO by PO number:

1. Go to the Document History charm in the site navigation bar.
2. Select the PO History sub-menu.
3. Click the by PO No. tab.
4. Enter the PO number in the Purchase Order No. field OR
5. Click the Filter checkbox.
6. Enter your search criteria and click the Search button.
7. Your search results will display.
8. If you want to perform a new search, click the New Search button.
9. If you want to save your search criteria, click the Save Query button.
10. If you want to run an existing query, click the Select Query button.

**PO Search by Supplier/SKU**

Purchase orders created in FlashCart can be located by using the Supplier Name and/or SKU number. You can search for a single PO or a group of POs as well.

Follow these steps to Search for a PO by Supplier or SKU:

1. Go to the Document History charm in the site navigation bar.
2. Select the PO History sub-menu.
3. Click on the By Supplier/SKU tab.
4. If you know the supplier, enter the full name of the supplier in the Supplier Name field or click the Select Supplier button to locate a supplier.
5. If you know the SKU number, enter that information in the Catalog No. (SKU) field OR
6. To search by means other than supplier or SKU click the Filter checkbox.
7. Enter your search criteria.
8. Click the Search button. Your PO Search Results will display.
9. If you want to perform a new search, click the New Search button.
10. If you want to save your search criteria, click the Save Query button.
11. If you want to run an existing query, click the Select Query button.

**Search Exports**

FlashCart allows you to perform searches on purchase orders and purchase requisitions. Your search results can be easily exported.

There are three ways to export data:

- **Screen Export**: Exports the information available in the search results screen
- **Transaction Export**: Exports an expanded set of information
Exporting Purchasing Data

You can export data after you have performed any of the searches described in the preceding pages.

Follow these steps to Export Purchasing Data:

1. Perform one of the searches described in the preceding pages.
2. From your search results window, click the Request Export button. A pop-up window will display.
3. Fill in the fields. Note: The File Name field is required. It is best to name your export with a meaningful name.
4. Click the Submit Request button. Note that the size of your export will affect the time it takes to run your export.
5. Click the Search Exports sub-menu and locate your export.
6. When the Export Status is “Completed” you can view your export.
7. To access your export, click on the file name.
8. You will be asked if you want to Open or Save your data. Files are created in .csv format, but should be saved as.xls (Excel) format.

End of document.