Submitting Carts

In Buy@Duke, submitters are part of a team that will also include shoppers. When a shopper has created a cart that is ready for submitter review, the shopper notifies the submitter. Submitters receive a system generated email notifying them a cart is ready for their review. Once in the cart, submitters can review and make any necessary changes to the cart before submitting it into workflow for approval.

1. To begin the submission process, submitters either:

   a. Select link in the email notification received. This action opens the shopping cart in your default web browser. This is the recommended way to find the cart.

   b. Log in to Buy@Duke and go to the Shopping page. From that page, use the tabs to display shopping carts looking for the cart that needs to be reviewed using the tabs below. Select the Shopping Cart Number to open the cart. Carts that require review will display with an Item Status of Saved.

   - **Shopping Carts All Inclusive** tab to display the carts you created and the carts created by your Team Members;
   - **Team Carts** tab to display the carts that were created by your Team Members.
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2. Once you’ve opened the detailed view, notice the action buttons available. To gain access to the cart, select **Take Over**.

   ![Display Shopping Cart Image]

   **Note:** If you receive an email notifying you that a cart is ready to be submitted, but **Take Over** is not displayed when you open the cart, another submitter on your team has already submitted the cart.

3. Now that you have taken over the cart, the action buttons change. Notice that **Submit Cart** now appears. At this point, you have complete access to review the cart making any necessary changes.

   ![Edit Shopping Cart Image]
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4. Before submitting the cart, submitters should review the following:

   a. Review the address used on the cart to confirm the correct delivery location.

   

   b. Use the Details section for each item of the cart. Under Item Data, review information about the item. The product source will indicate if the item is from a Duke Marketplace Catalog or created via a Text order. If goods receipt is required, ensure the GR Non-Valuated box is checked.

   **Note:** If the GR Valuated box is checked, remove the check and select the GR non-valuated as that is likely an error. If you have questions, contact your business office before submitting the cart.
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c. Review the **Account Assignment** for each line. Verify accuracy of cost object(s) and GL account(s). If WBS elements are used, ensure the purchase is allowable, allocable, and reasonable for the project. Make changes as necessary as outlined in the Shopping and Functions to Refine Carts section of this guide.

Note: This is an important step, as one of the Submitter’s primary responsibilities is assigning or verifying the correct fund information. For carts supporting Sponsored Research, it is the Submitter’s responsibility to assess and validate allocability, allowability, and reasonableness.

d. Select **Notes and Attachments** and review any documents that may be attached. As a general rule, any cart created for non-catalog/text orders should have attachments. At minimum, a quote supporting the pricing should be attached.
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   e. Scroll to the left and notice if the **Special Handling** applies to the cart. If so, ensure the appropriate information is included with the cart.
    - **Confirming Order – Bill Only** – invoice should be attached.
    - **New Address** – a W-9 completed by the supplier should be attached.
    - **New Vendor** – vendor registration packet should be attached.
    - **Special Shipping and Handling** – notes should be provided to the supplier describing what is needed.

5. Once you complete your review of the cart and make any necessary changes, select **Check** to generate error and warning messages as part of the validation process.

6. Select **Submit Cart**. Based on the submitter’s purchasing threshold and the goods/services being purchased, the cart will either have a purchase order issued automatically or will move into workflow for approval.
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7. Review the confirmation message and select **Close**.