

# *Draft Carts*

## *Chapter 3*



## ***Draft Carts***

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### **Section Objectives**

At the end of this section, you should be able to:

- Navigate to Draft Carts
- Resubmit orders that have been returned as a draft cart
- Create multiple draft carts as a method to build carts

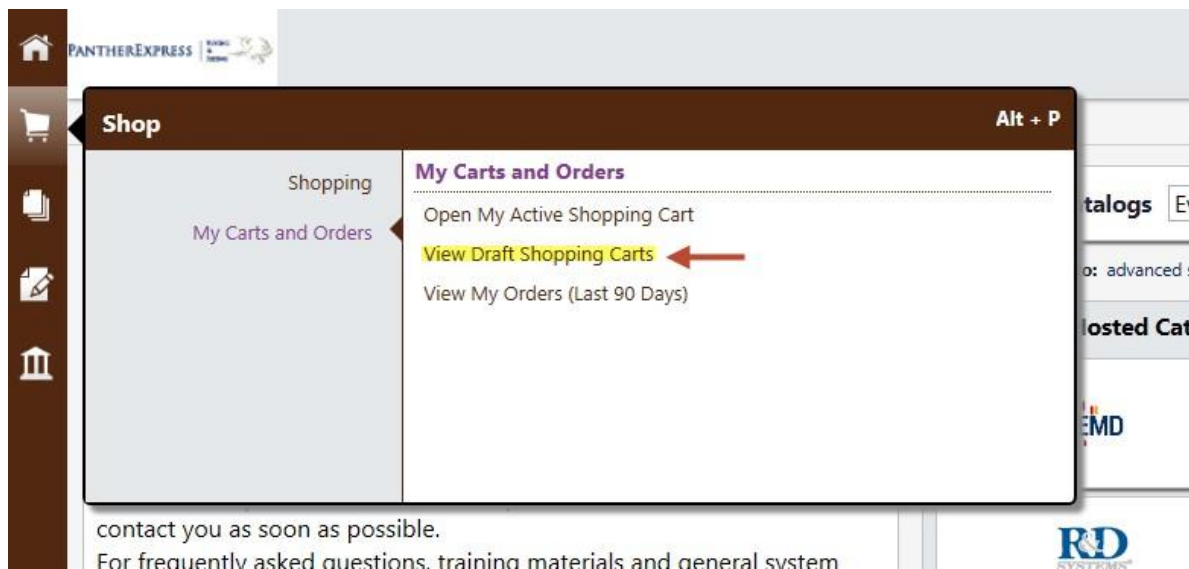
## *Navigating to Draft Carts*

PantherExpress will return requisitions with inactive or invalid account numbers.

- The requisition will be returned to the creator of the requisition as a Draft Cart.
- You will receive a system email notification of the return.
- A system generated comment will be placed in the requisition.
  - “System returned due to an invalid account number”
- If you are a shopper, resubmit the cart for your Buyer to assign the appropriate account number.
- If you are a Department Buyer you can edit the account number and resubmit the order.

To view your Draft Carts:

- Click on the *Shop* icon on the side navigation bar, followed by *My Carts and Orders* and *View Draft Shopping Carts*.



- Under My Returned Requisitions, click on the Shopping Cart Name to open the cart.

My Returned Requisitions			
Active Cart	Requisition Name	Date Created	
	2012-10-29 db18 02	10/29/2012	
	2012-10-29 db18 03	10/29/2012	
	Dry Erase Products	10/29/2012	

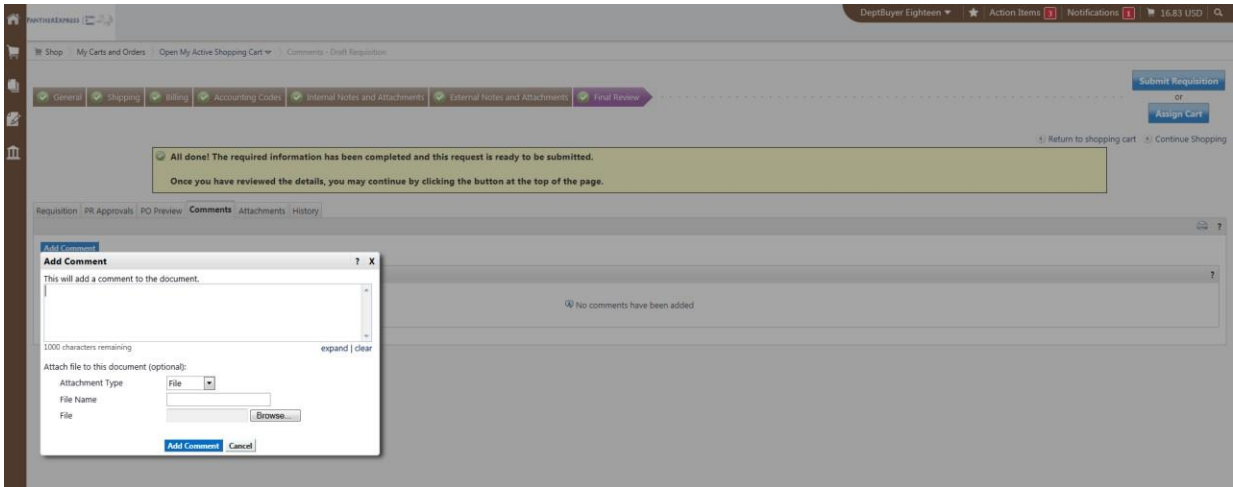
  

My Drafts			
Active Cart	Requisition Name	Date Created	
	2012-11-12 db18 01	11/12/2012	

## ***Navigating to Draft Carts***

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- If necessary, edit the account



- Comments can be added, by clicking on the *Comments* tab
- Submit the requisition

# ***Resubmit a Returned Draft Cart***

**Find the returned order to Garcia Marketing for the dry erase products. Correct the account number and resubmit the order.**

PantherExpress  
N→ Shop→ My Carts and Orders→ View Draft Shopping Carts→ My Returned Requisitions

My Returned Requisitions		
Active Cart	Requisition Name	Date Created
	2012-10-29 db18 02	10/29/2012
	2012-10-29 db18 03	10/29/2012
	Dry Erase Products	10/29/2012

My Drafts		
Active Cart	Requisition Name	Date Created
	2012-11-12 db18 01	11/12/2012

1. Locate the order under My Returned Requisitions. Click on the shopping cart name to open the order.

Shop | My Carts and Orders | Open My Active Shopping Cart | Summary - Draft Requisition

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Final Review

**All done! The required information has been completed and this request is ready to be submitted.**  
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Return to shopping cart Continue Shopping

Submit Requisition or Assign Cart

Requisition PR Approvals PO Preview **Comments** Attachment **History**

Summary General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Supplier Info Taxes/S&H

General		Shipping	Bill To
Requisition Name	Dry Erase Products	Ship To	University of Pittsburgh
Description	no value	Attr: DeptBuyer Eighteen	Payment Processing
Prepared by	DeptBuyer Eighteen	Phone: +1 (412) 555-2424	116 Atwood Street
Department	Med-Computational Biology (Med-Computational Biology)	Email: panther.buy@bc.pitt.edu	Pittsburgh, PA 15260
Prepared for	DeptBuyer Eighteen	Room: 3309	United States
Approval Priority	Normal	Cathedral of Learning	
		4200 Fifth Ave	
		Pittsburgh, PA 15260	
		United States	
Commodity	Commodity Type		
no value	no value		

2. Click on the *History* tab or *Comments* tab for details regarding why the requisition was returned.

# Resubmit a Returned Draft Cart

## History Tab

Shop | My Carts and Orders | Open My Active Shopping Cart | History - Draft Requisition

Submit Requisition or Assign Cart

Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition | PR Approvals | PO Preview | Comments | Attachments | **History**

Click to filter history

Results per page: 20 | Records found: 44 | Page: 1 of 3

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	11/19/2013 10:37 AM	System	Intermediate Validation	Message transmission to external system was successful.				
	11/19/2013 10:37 AM	System		Requisition returned		System	DeptBuyer Eighteen	
Line 1	11/19/2013 10:37 AM	System	Intermediate Validation	Requisition note added				Invalid Account
	11/19/2013 10:37 AM	DeptBuyer Eighteen		Requisition submitted				
	11/19/2013 10:37 AM	DeptBuyer Eighteen		Requisition modified	Department Change Order	35258:100%, 35258:25.4%	35258	
	11/19/2013 10:37 AM	DeptBuyer Eighteen		Requisition modified	Department Change Order:Split method	Amount of Price	% of Price	

OR

## Comments Tab

Requisition | PR Approvals | **Comments (1)** | Attachments | History

Add Comment

Records found: 1

Applies To: Requisition - 24928877  
System returned due to invalid account number 11/20/2013 7:28 PM

3. This order was returned due to an invalid account number.
4. Click on the *Requisition* tab to return to the order.

# Resubmit a Returned Draft Cart

Shop | My Carts and Orders | Open My Active Shopping Cart | Summary - Draft Requisition

Submit Requisition or Assign Cart

Return to shopping cart | Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary | PR Approvals | PO Preview | Comments | Attachments | History

General | Shipping | Billing | Accounting Codes | Internal Notes and Attachments | External Notes and Attachments | Supplier Info | Taxes/S&H

Hide header

General	Shipping	Billing
Requisition Name: Dry Erase Products	Ship To: Attn: DeptBuyer Eighteen, Phone: +1 (412) 555-2424, Email: pantherbuy@bc.pitt.edu, Room: 3309, Cathedral of Learning, 4200 Fifth Ave, Pittsburgh, PA 15260, United States	Bill To: University of Pittsburgh, Payment Processing, 116 Atwood Street, Pittsburgh, PA 15260, United States
Description: no value		
Prepared by: DeptBuyer Eighteen		
Department: Med-Computational Biology (Med-Computational Biology)		
Prepared for: DeptBuyer Eighteen		
Approval Priority: Normal		
Commodity: no value	View/edit by line item...	View/edit by line item...
Commodity Type: no value		

Accounting Codes

Entity	Department	Sub Code	Purpose	Project	Reference
02 Operating	35258 Med - Computational and Systems Biology	6000 Office Supplies	00000 Default-No Value	000000 Default-No Value	02534

WARNING! Do not assign a value here. ONLY use to confirm that a value is active in PantherBuy.

Account Code: no value

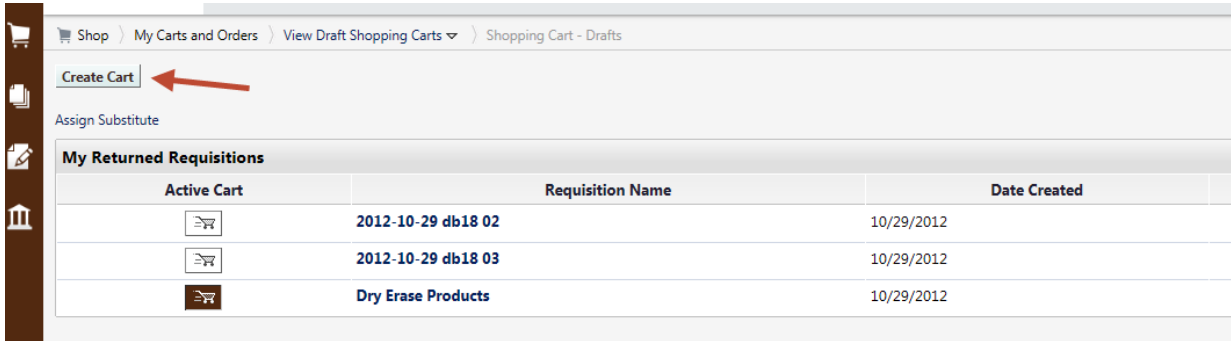
- Correct the account number
  - 04.49010.6020.22950.000000.00000
- Click on the *Comments* tab. Add the following comment:
  - Corrected account no. and resubmitted for approval
- Resubmit the requisition.

# Create Multiple Draft Carts

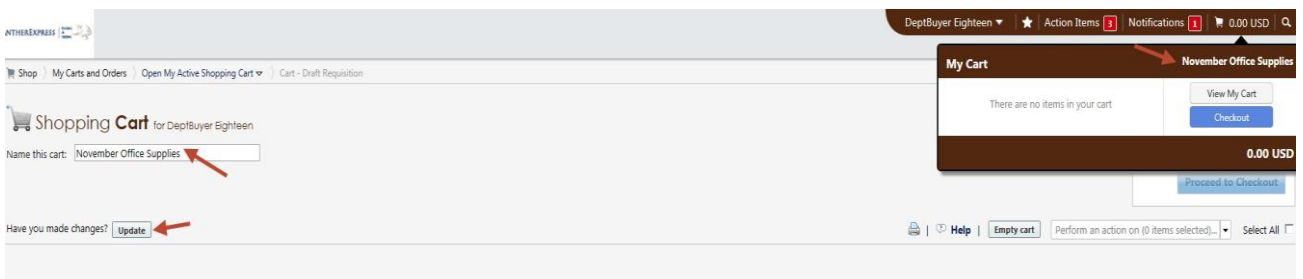
You want to start two carts, one for **Supra**, and one for **Fisher Scientific**. You want to build the carts over the next few days, so you will name and save them as draft carts.

PantherExpress

N → Shop → My Carts and Orders → View Draft Shopping Carts



1. From the Home Page click on *Shop* (cart icon), followed by *My Carts and Orders* and *View Draft Shopping Carts*.
2. Click *Create Cart*.



3. Give the cart a name and Click *Update*
  - *Current Month Office Supplies*
4. Notice that this cart becomes the active cart
5. Click on *Shop* (cart icon), *My Carts & Orders*, *View Draft Shopping Carts*, *Create Cart*
6. Create a second draft cart. Give the cart a name and click *Update*.
  - *Current Month Lab Supplies*
7. The second draft cart now becomes the active cart.



## ***Create Multiple Draft Carts***

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8. Click on *Draft Carts* and select the cart you would like to be the active cart.
  - Search for items and add them to your active cart; the cart is saved.
9. To switch carts, click on *Carts, Draft Carts* and select another cart to be the active cart.
10. The carts will remain as Draft Carts until they are submitted.

## **Create Draft Carts – Helpful Hints**

### **Helpful Hints**

- If a cart is active, and you exit the application, the cart will continue to be the active cart the next time you login to the application.
- Click on the cart icon in the upper right corner of your screen, if you are not sure what is your active cart.