

Draft Carts

Chapter 3



Draft Carts

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

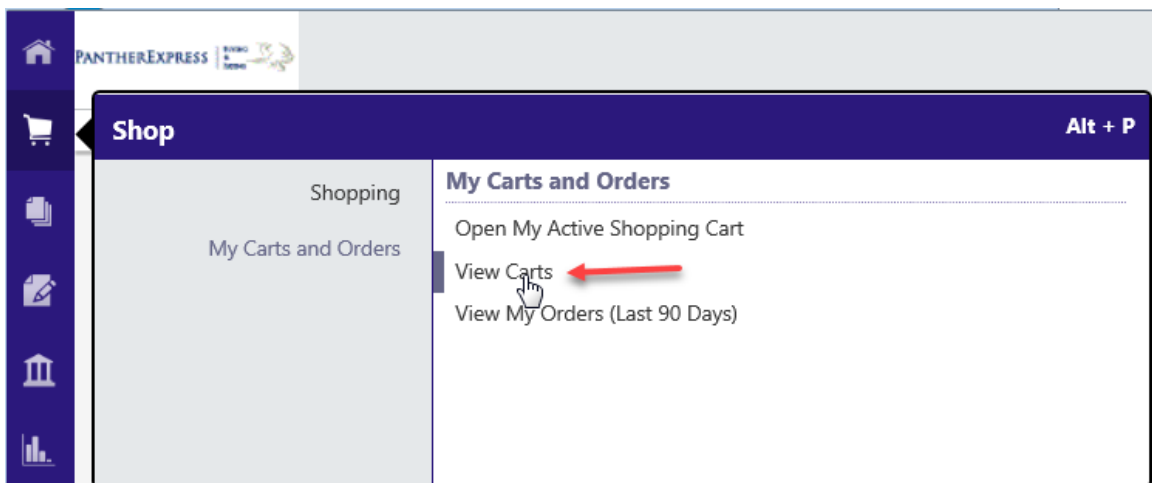
Navigating to Draft Carts

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 Carts*.



Cart Management Create Cart ?

Draft Carts Assigned Carts

Filter Draft Carts

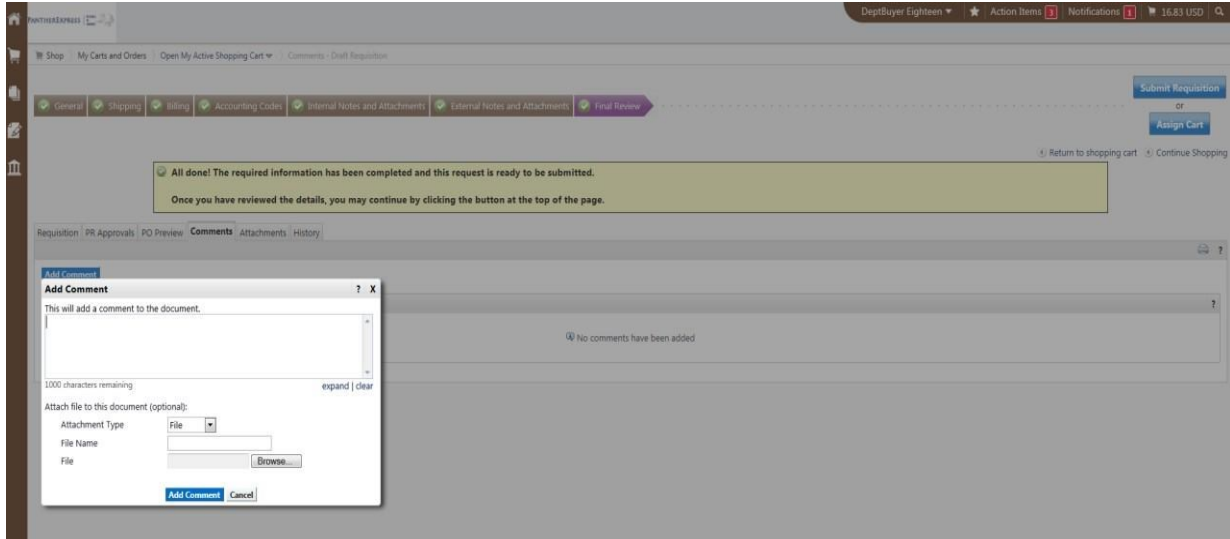
1-6 of 6 Results 20 Per Page

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2017-08-08 dbt1 01		8/8/2017	0.00 USD	View
Normal	Stockroom Order		9/6/2017	108.02 USD	View
Normal	vwr emergency		9/6/2017	0.00 USD	View
Normal	2017-09-15 dbt1 04		9/15/2017	0.00 USD	View
Normal	2017-09-18 dbt1 01		9/18/2017	0.00 USD	View
Normal - Returned	Dry erase supplies		9/18/2017	373.75 USD	View

- For any Draft or Returned Cart, click the Shopping Cart Name to open the cart.

Navigating to Draft Carts

- If necessary, edit the account number



- 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 Carts

Cart Management Create Cart ?

Draft Carts Assigned Carts

> Filter Draft Carts

1-6 of 6 Results 20 Per Page

Type	Shopping Cart Name	Cart Description	Date Created	Total	Action
Normal	2017-08-08 dbt1 01		8/8/2017	0.00 USD	View
Normal	Stockroom Order		9/6/2017	108.02 USD	View
Normal	vwr emergency		9/6/2017	0.00 USD	View
Normal	2017-09-15 dbt1 04		9/15/2017	0.00 USD	View
Normal	2017-09-18 dbt1 01		9/18/2017	0.00 USD	View
Normal - Returned	Dry erase supplies		9/18/2017	373.75 USD	View

1. Locate the order under Cart Management. Click on the shopping cart name to open the order.

PANTHEREXPRESS Department Buyer1

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

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

Summary Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments

General		Shipping
Requisition Name	Dry erase supplies edit	Ship To edit
Description	no value	Attn: Department Buyer1
Prepared by	Department Buyer1	Phone: +1 (412) 555-2424
Department	Dent Med-Office of the Dean (Dent Med-Office of the Dean)	Email: dummypb@gmail.com
Prepared for	Department Buyer1	Room: M3
Approval Priority	Normal	Thaw Hall
		3943 O'Hara St
		Pittsburgh, PA 15260
		United States

[View/edit by line item...](#)

2. Click on the *Comments* or *History* tabs for details on why the order was returned.

Resubmit a Returned Draft Cart

History Tab

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

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

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	

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 11/20/2011 7:20 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

General ?		Shipping ?		Billing ?	
Requisition Name	Dry erase supplies <input type="button" value="edit"/>	Ship To	<input type="button" value="edit"/>	Bill To	<input type="button" value="edit"/>
Description	<i>no value</i>	Attn: Department Buyer1 Phone: +1 (412) 555-2424 Email: dummyspb@gmail.com Room: M3 Thaw Hall 3943 O'Hara St Pittsburgh, PA 15260 United States		University of Pittsburgh Payment Processing 116 Atwood Street Pittsburgh, PA 15260 United States	
Prepared by	Department Buyer1				
Department	Dent Med-Office of the Dean (Dent Med-Office of the Dean)				
Prepared for	Department Buyer1				
Approval Priority	Normal				
View/edit by line item...					
Accounting Codes ?					
ASSIGN your account code here:					
Entity	Department	Sub Code	Purpose	Project	Reference
02	49010	6020	22950	000000	00000
Operating	Dental Med - Dean's Office	Equipment & Office Furniture LT \$5,000	Dean's Discretionary Account	Default-No Value	
<input type="button" value="edit"/>					

5. Correct the account number

- 04.49010.6020.22950.000000.00000

6. Click on the *Comments* tab. Add the following comment:

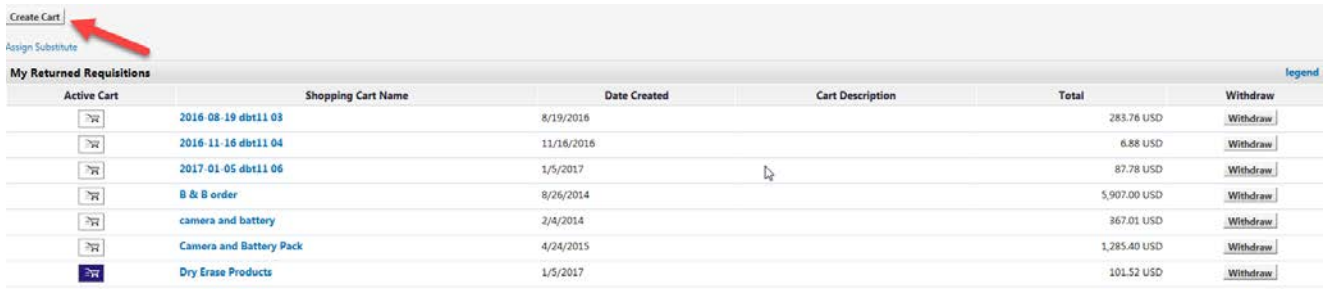
- Corrected account no. and resubmitted for approval

7. Resubmit the requisition for approval

Create Multiple Draft Carts

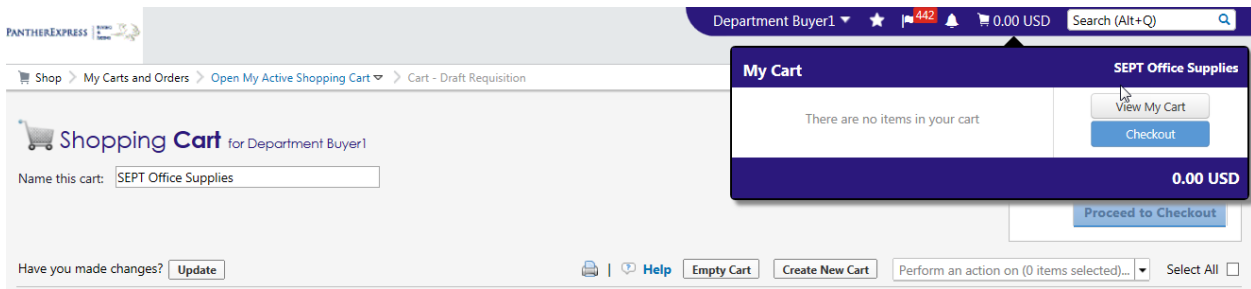
You want to start two carts, one for Supra, and one for Fisher Scientific. You want to build the carts over the next few days, so you will name and save them as draft carts.

PantherExpress
N → Shop → My Carts and Orders → View Carts



Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Withdraw
	2016-08-19 dbrt11 03	8/19/2016		283.76 USD	Withdraw
	2016-11-16 dbrt11 04	11/16/2016		6.88 USD	Withdraw
	2017-01-05 dbrt11 06	1/5/2017		87.78 USD	Withdraw
	B & B order	8/26/2014		5,907.00 USD	Withdraw
	camera and battery	2/4/2014		367.01 USD	Withdraw
	Camera and Battery Pack	4/24/2015		1,285.40 USD	Withdraw
	Dry Erase Products	1/5/2017		101.52 USD	Withdraw

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



Department Buyer1 | 442 | 0.00 USD | Search (Alt+Q)

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

Shopping Cart for Department Buyer1

Name this cart:

Have you made changes?

My Cart: SEPT Office Supplies

There are no items in your cart

0.00 USD

Perform an action on (0 items selected)...

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 **Create New Cart**
6. Create a second draft cart. Give the cart a name and click **Update**.
 - *Current Month Lab Supplies*

Create Multiple Draft Carts

7. The second draft cart now becomes the active cart.
8. Click on *Carts* → *My Carts and Orders* → *View 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* → *My Carts and Orders* → *View 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.