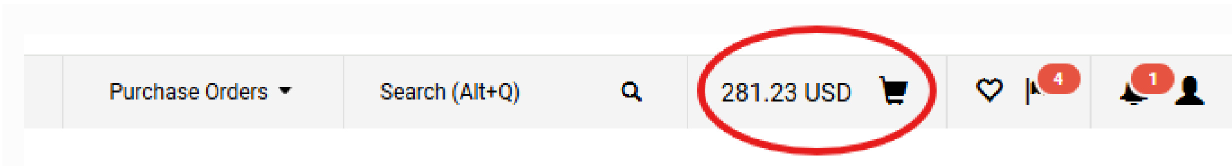
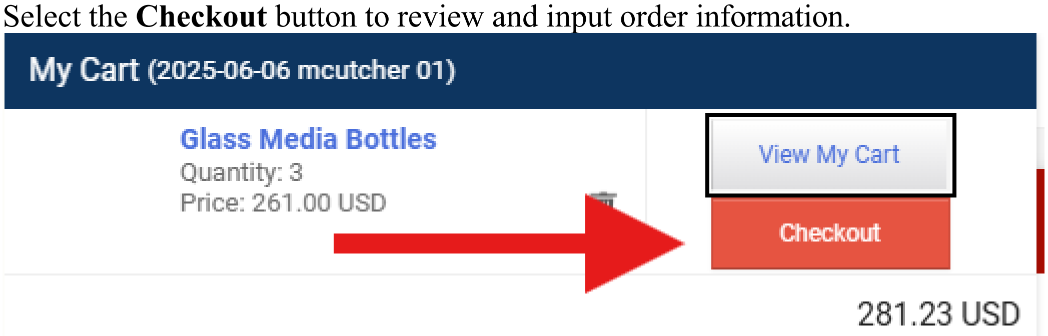
SHARING YOUR CART

- Once you have all of your desired goods in your cart, you can quickly access your cart by clicking the shopping cart icon on the upper right-hand side of the screen.

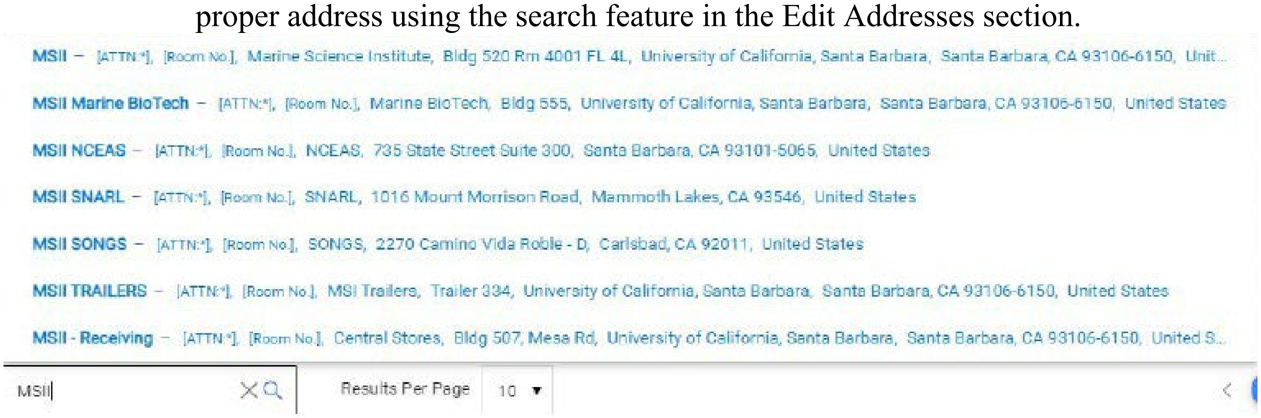


- To finalize your cart and share it with MSI Purchasing staff, all of your items in the active cart need to be from one supplier.
    - The purchase order number is a contract between the University and the supplier; we cannot send the same purchase order number to more than one supplier.
    - Users can have as many draft carts as needed to accomplish this.
    - If items from different suppliers need to be moved to a separate cart, check the box next to the line item and select **Move to Another Cart** from the available actions drop down menu.
- Select the **Checkout** button to review and input order information.

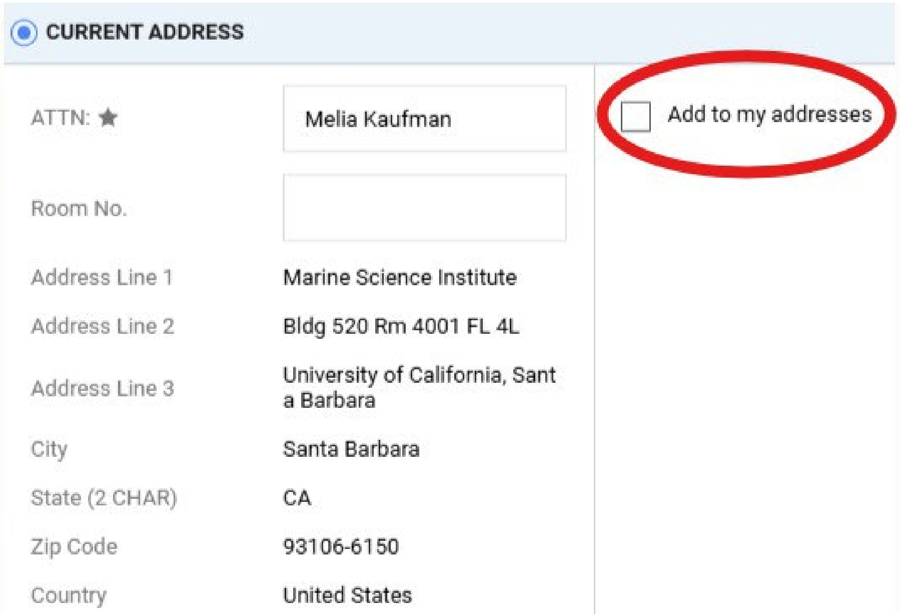


- In the Checkout screen, users will be brought to the Requisition Summary page to enter in Ship-To Information, Account Code information, and any other information that is important for the specific order.

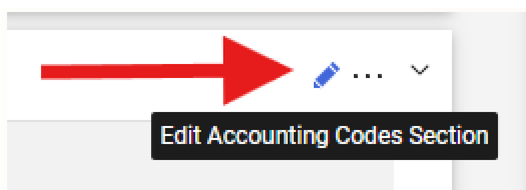
- ***Addresses:***
    - The Ship-to address needs to be updated before the order is shared. Search for the proper address using the search feature in the Edit Addresses section.



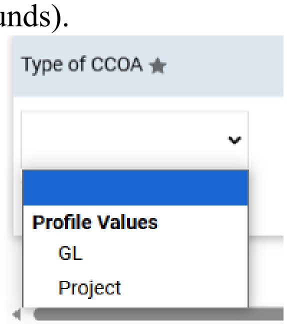
- Search for either a 4-digit department code (Ex: MSII) or **ONE** to get a one-time ship to address feature. Select the corresponding address and enter in user detail information for the order.
  - Users also have the option to **Add to my addresses** for future use.



- ***Accounting Codes:***
  - The Common Chart of Accounts (CCOA) that will be used for the purchase needs to be input before the order is shared.
  - Select the pencil icon in the right corner of the Accounting Codes section to edit the CCOA.



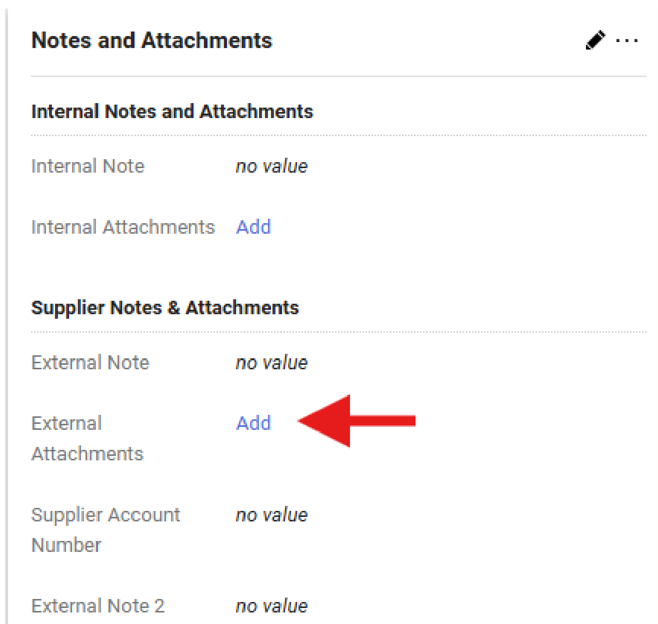
  - Always start with the **Type of CCOA** box. Select **GL** for those strings that do not have a project code assigned (typically non-sponsored funds) and **Project** for those strings that do have a project code assigned (typically sponsored funds).



- If selecting **GL**, the following segments will need to be entered:
    - CCOA Fund (always required)
    - CCOA Level 7 FRU (always required)
    - CCOA Purpose (always required)
    - CCOA Program (always required - typically will be 000)
    - CCOA Commitment (if applicable)
    - CCOA Activity (if applicable)
- If selecting **Project**, you will only need to enter the CCOA Project segment; everything else required for a project string will auto populate.

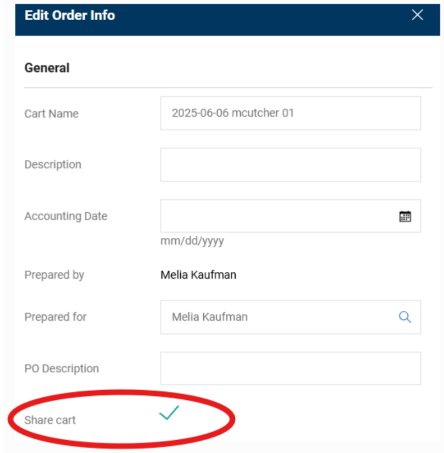
CCOA segment values have been provided to all MSI PIs for the funds they are responsible for.

- ***Quotes***
    - If you received a quote from the supplier, please attach the quote under the Notes and Attachments section on the left-hand side of the requisition as an external attachment.

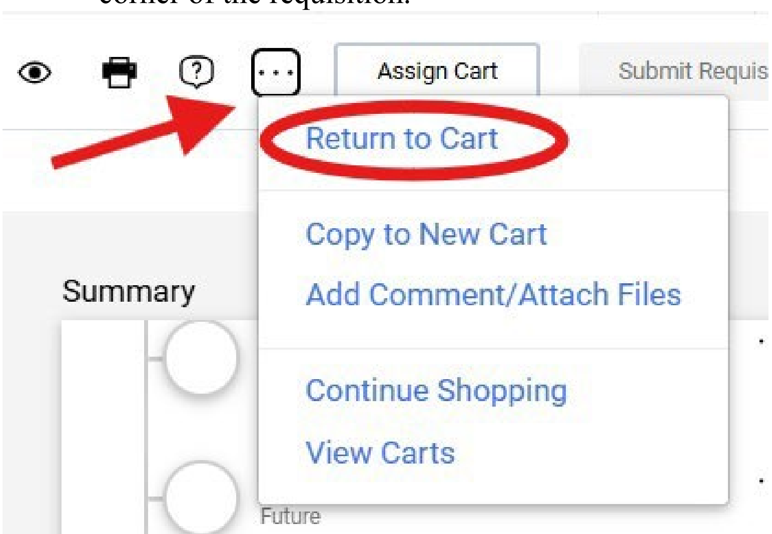


- Once all information has been entered on the requisition, the cart needs to be shared and unlocked for MSI Purchasing staff to review and submit into approval workflow. To share the cart, select the pencil icon in the Order Info section in the upper left of the requisition. Check the **Share Cart** box.
    - **If you are a member of multiple shared groups, ensure you select MSII.**
    - **If you don't see the Share Cart option, please contact msi-purchasing@ucsb.edu with your full name requesting to be added to MSI's shared cart group.**

- **Please do not share the cart until you are completely done adding all necessary information.**



- To unlock the cart, select **Return to Cart** from the three-dot dropdown in the upper right corner of the requisition.



- Select the **Unlock** button in the upper right corner of the cart. Once unlocked, it will allow MSI Purchasing staff to edit the requisition. This will be the final step. **Please do not assign the cart to a MSI Purchasing staff member.**