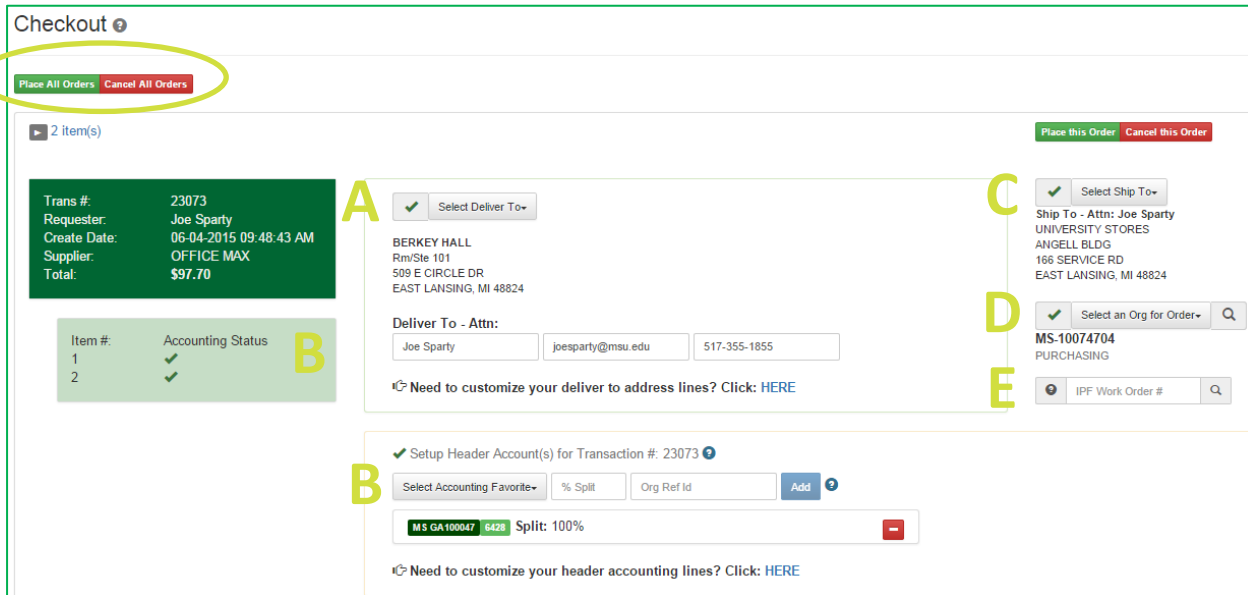
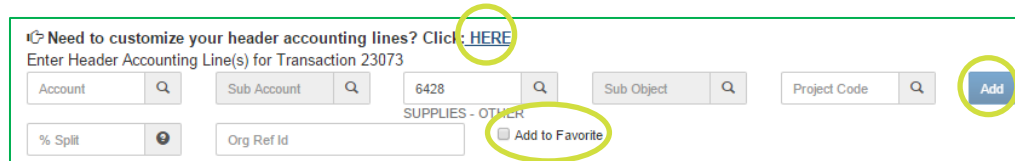


Overview: This job aid demonstrates how to perform the **Checkout** Process in Spartan Marketplace, including setting and or verifying **Accounting, Deliver To, Ship To, and Organization** information prior to order submission.



1. On the **Checkout** Page, several things need to be reviewed prior to placing an order:

- A. **Select Deliver To** – Here, a user can add, review, and/or update the **Deliver To** information for an order. Spartan Marketplace will populate the default **Deliver To Address and Deliver To Attention** information if a user has this set up in their Profile. Change a Deliver To address by clicking on the drop down arrow which will display all addresses a user has saved in the Profile Favorites. Adding a new—or updating an existing—Deliver To Address can be completed in the Profile Favorites section. Please see the **Favorites Deliver To Job Aid** for additional guidance.
Note: The Deliver To Address applies to all lines of an order.
- B. **Accounting Setup** – A user can add, review, and/or update the Accounting information for an order. Accounting information can be captured at either the header level (applies to all lines of the order) or at the line item level (unique accounts for each line item of the order).
 - Header Level – The standard Accounting Setup view in Marketplace is at the header level. Marketplace will default an Account Number (if set up in Profile Favorites) at 100% distribution.
 - Adding a new Account Number – user can add a new Account Number for use at the header level by selecting the **Need to customize your header accounting lines? Click HERE**

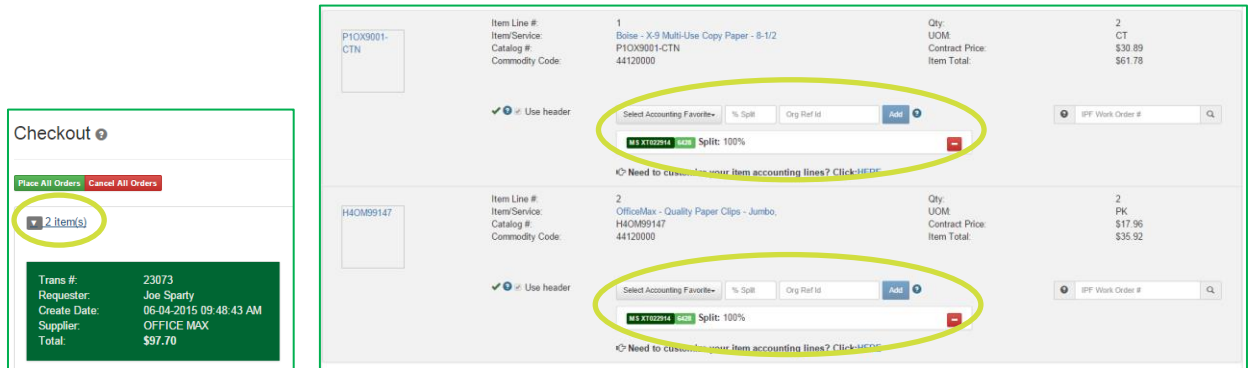


Users can enter Accounting information to locate the desired Account number and hit **Add** which will add this Accounting number to the order. You can also select the Add to Favorite option which will save this Account under your Profile Favorites for future use.

- Split Account Distribution – users can also change the accounting distribution at the header level.



- User selects the Red/White subtract box to remove the default account number
 - User selects an Account Number from the Accounting Favorite dropdown and assigns a percentage distribution
 - User continues this process until desired Account numbers and appropriate split distribution is completed. **Note:** Total distribution of all account numbers must equal 100%.
- Line Item Level – Users can also enter Accounting information at the line item level. Varying account numbers and account distributions can be entered for individual lines of an order.

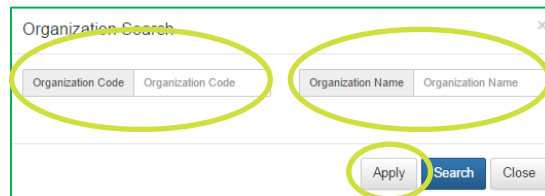
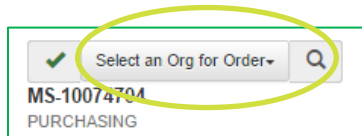


- Click on the **Arrow and number of Items** link on the Checkout Page. This will expand the Order and display all line items. The Marketplace default view is to show the Order header information with all line items collapsed.
 - Accounting information can be added, reviewed and/or updated in the same manner as the Header level. Please refer to previous page Header Level – Accounting Setup section for instruction.
 - Split Account Distribution can also be changed at the line item level in the same manner as the Header level. Please refer to the Header Level section above for instruction.
- Accounting Validation – Marketplace provides a visual check to inform users on Accounting status. The Account Number(s) is valid and account distribution percentages total 100% either at the header or line item level if a Green check mark is shown (for each line item). If anything is invalid related to the Accounting Setup then a Red 'X' is displayed (for each line item).

Item #	Accounting Status
1	✓
2	✓

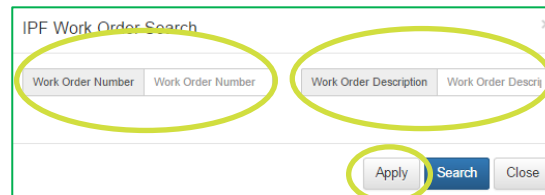
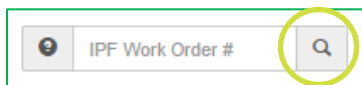
- **Ship To Selection** – Here, users can review and select the Ship To address for the order. Spartan Marketplace will default to the University Stores 166 Service Road East Lansing, MI address for all users (Central Shipping and Receiving). However, users can access the **Select Ship To** drop down menu and select any of the other eight MSU campuses and affiliate addresses. **Note:** The Ship To Address only applies at the header level of an order.

D. **Org for Order Selection** – Here, users can add, review, and/or update the Organization Code. Spartan Marketplace will populate the default Org Code if a user has this set up in their Profile. Users can change the Org Code by clicking on the **Select an Org for Order** drop down arrow to display all Org Codes saved in Profile Favorites. Adding a new—or updating an existing Org Code—can be completed in the Profile Favorites section. Please see the **Favorites Organizations Job Aid** for additional guidance. Add Org Codes directly in the Checkout screen by clicking on the magnifying glass. In the Organizational Search window, users can find an Org Code via the Code or Organizational Name. Once the desired Org Code is located, click on **Apply** to populate the Org Section.



Note: The Org for Order only applies at the header level of an order.

E. **IPF Work Order # Selection (IPF ONLY)** – Here, IPF users can add a **Work Order #** for the order that will apply at the header level (all items) or at the line item level. Click on the magnifying glass to bring up the IPF Work Order Search window and find a Work Order # via the Number or Work Order Description. Once the desired Work Order # is located, click on **Apply** to populate the number in the IPF Work Order # Section of the order. Please see the **IPF Work Order Number Job Aid** for additional guidance.



2. Once the additions, updates, and review of these order attributes are complete, the order is now ready to be placed. Users can either **Place This Order** or **Cancel This Order** via the buttons on the Checkout Page. **Note:** The Spartan Marketplace Checkout can have multiple orders from multiple suppliers in the original Cart. Users can **Place All Orders** or select an individual order for submission. A single order can be cancelled or, to cancel all orders, click the **Cancel All Orders** button.

Tip: Users should set Deliver To, Accounting, and Org Favorites in their Profile. This will help save time and streamline the Checkout process.