Un-Assigning a Shopping Cart

Shopping carts can be assigned to other Shoppers and Requestors for review, revision and checkout. If needed, a shopping cart that you have assigned to another individual can be unassigned and returned to your personal cart. To return an assigned cart to your personal cart, select “View Carts” within your shopping cart. Click the tab “Assigned Carts.” Use the “Action” drop down button on the cart you wish to unassign and select “Unassign.” The cart will return to your personal shopping cart for further actions such as editing, checkout or deleting.

Changing Email Preferences

Since most of the communications from eSHOP are generated via email, it is recommended that you review your default email setting and adjust them accordingly. Keep in mind: the more notifications you have enabled, the more emails you will receive.

To change your email preferences, click on your name and from the dropdown select View My Profile. Click on Notification Preferences and select a category.

Withdrawning Requisitions

eSHOP reminds funding Approvers for seven (7) days to take action on requisitions submitted for approval. If no action is taken the requisition will remain in the Approver’s eSHOP approval folder, and a purchase order will not be placed. Requestors are encouraged to withdraw unapproved requisitions from the Approver’s folder. Instructions on this process can be found here. Withdrawing the requisition may allow the Requestor to resubmit the requisition for approval (vendor dependent). Withdrawing also prevents order placements that may include outdated pricing or unavailable products from punchout catalog vendors, as well as preventing duplicate order placement.

Quick Tip! The Personal Settings within your profile allow you to change the background color of eSHOP. Click here to learn more.
Invoiced Item(s) Require Attention

“An invoice is in process for the line item(s) listed below; however, a corresponding receipt has not been created in eSHOP.”

What can you do when you receive this notification? Based on what we call a 3-Way-Match, the system is looking for your order, the invoice, and a quantity receipt created in eSHOP to all match. The system is looking at each line item for both quantity and price to match your purchase order. When an invoice arrives before a quantity receipt is created, the requester will get the above notification. Eliminate this notice by creating a receipt yourself when you have received the goods or service.

Go to your PO-->available actions-->create quantity receipt.

• If entire order has been received simply click Complete – you are all done.
• If you have received part of your order make adjustments to the line items before hitting Complete.
• REMOVE LINE: this does nothing but remove that line from your receipt workspace. Best practice is that if you are not going to work with that line, remove it.

Remember, eSHOP looks at each line independently. If are receiving a partial order, you will need to do another quantity receipt when the order is fulfilled.

Returning Items

Return items by contacting the vendor directly. You cannot return items without vendor authorization. Punch-out vendors have supplier guides directing you how to process a return with them. You will need to familiarize yourself with that supplier’s policy.

Creating a quantity receipt for your return allows Accounts Payable pay the invoice and add the credit later. You cannot return something you have not received.

Go to your PO-->available actions-->create quantity receipt.

• (optional) Remove the lines you are not going to work with.
• Enter the total quantity received and click Receive & Return .
• This duplicates the line with one that is populated. Insert the return quantity and click Complete.

PCard/Group Card Application Form

We now have available a PCard/Group Travel Card Application Form in eSHOP. To apply for a card, fill out the form in eSHOP, add form to cart, and enter the same Cost Object in check out that was used on the form as the Default Cost Object for Billing Purposes. Please use 523600 for the GL Account. Once the form is Submitted and Approved by the Cost Object Approver, the form will go to Business Services to place the order for the card. The Instructions for this form can be found in Firefly under the eSHOP Training Resources.