

Creating a Shopping Cart with Lion Marketplace

**Update Default Delivery Address to your actual building location (instructions and location codes - [KB Article - Manage your Default Delivery Address](#))

Shopping carts w/ Lion Marketplace can be completed 1 of 2 ways:

❖ **#1 - Requisitioning Tab, click Requisitioning, click Shopping Cart**

- Complete Header section (Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170}, click necessary boxes for Sole Source, After the Fact Order, etc...)
- If you select Default Settings: Set Values – can add budget on Account Assignment & add information on Delivery Address, this will apply to each line item automatically. BE SURE TO VERIFY INFORMATION IS CORRECT FOR EACH ITEM USING THE ITEM OVERVIEW TABS.
- Do not need to complete anything under ARL or ACO Approval
- In Item Overview section, click Add Item, select Lion Marketplace
 - You will go into what used to look like EBUY with the available suppliers
 - Click or search your item/supplier, you will be directed to their site
 - Once you add the items to your cart, you will check out
 - The Shopping Cart page will come up to review your items and rename your shopping cart if not done so already ****Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170}****
 - Click Proceed to Checkout (upper right corner)
 - Yellow box will display saying “All Done!”, click Return to Simba in upper right corner
 - You will return to the shopping cart
- Highlight Line Item #1 (click on box at beginning of line), click Details *go through each tab to verify information is complete/correct*
- Item Data tab will have the information that is auto-populated from the catalog order
- Account Assignment (will need to click Details again by Percentage) –
 - If Default Setting Value did not hold - Pick what Cost Object you are charging (either Cost Center or Order for IO numbers) enter information in required box
 - Verify General Ledger Account is correct - this does auto populate but be sure to verify it is correct
- Notes and Attachments – add any necessary attachments such as quotes, invoices, Sole Source Justifications, etc...
- Delivery Address/Performance Location – enter your phone number, Floor/Room number and complete the C/O line if necessary. The Building location should be your actual building
- Sources of Supply/Service Agents – will show the vendor you shopped from
- Approval Process Overview – will show where the cart will go during the approval process

❖ **OR #2 – on Home Tab, click Shop**

- **STEP 1 of 3 - Click Lion Marketplace**
 - You will go into what used to look like EBUY with the available suppliers
 - Click or search your item/supplier, you will be directed to their site
 - Once you add the items to your cart, you will check out
 - The Shopping Cart page will come up to review your items and rename your shopping cart ****Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170}****
 - Click Proceed to Checkout (upper right corner)
 - Yellow box will display saying “All Done!”, click Return to Simba in upper right corner
 - You will return to the shopping cart
- **STEP 2 of 3 - Highlight Line Item #1 (click on box at beginning of line), click Details *go through each tab to verify information is complete/correct***
- Item Data will have the information that is auto-populated from the catalog order
- Account Assignment (will need to click Details again by Percentage) –
 - If Default Setting Value did not hold - Pick what Cost Object you are charging (either Cost Center or Order for IO numbers) enter information in required box
 - Verify General Ledger Account is correct - this does auto populate but be sure to verify it is correct
- Notes and Attachments – add any necessary attachments such as quotes, invoices, Sole Source Justifications, etc...
- Delivery Address/Performance Location – enter your phone number, Floor/Room number and complete the C/O line if necessary. The Building location should be your actual building
- Sources of Supply/Service Agents – will show the vendor you shopped from
- Approval Process Overview – will show where the cart will go during the approval process
- **STEP 3 of 3 - Complete Header section in (Rename shopping cart to include your mnemonic at the beginning {EX: NUTR, SKK170} if not done so already, click necessary boxes for Sole Source, After the Fact Order, etc...)**
- Do not need to complete anything under ARL or ACO Approval

This is the same for each option above

- ❖ Once everything is complete, click Check to verify there are no errors. Anything with a red exclamation point will need to be corrected prior to submitting. Anything with a yellow sign, is a warning but can be submitted.
- ❖ You can save the shopping cart to come back to later or click Order to put the shopping cart through the approval process.
- ❖ To view the approval process after the cart is submitted, go to your Home Tab and click Shopping Area. Click REFRESH and open carts will display. Click the blue link of the one you want to review. Click “Display/Edit Agents” in the header section.

For any free text orders (non-catalog) or catalog orders over \$5,000, a Goods Confirmation will need to be completed once the items/service(s) have been received. You will not receive an email to confirm these PO's, they are encouraging individuals to be proactive to complete this step once they receive the items/service(s).

Please follow the below steps to complete a Goods Confirmation

- ❖ Go into Shop OnLion
- ❖ Click the Requisitioning tab
- ❖ Click Confirmation under Create Documents
- ❖ To find a specific Purchase Order or Shopping Cart, enter the number and click Search. To see all Purchase Orders that you have authorization to enter a confirmation on, click Search with all criteria fields empty
- ❖ Select a Purchase Order, select a line and click Continue
- ❖ Add PO number in the Reference Document
- ❖ In the Confirm Quantity column, enter how many items you are confirming - This will be how many you actually received, if you ordered 10 and only received 5 you would put 5 because you did not receive all 10 yet
- ❖ If this is the last expected delivery for the line or if all the items have been received, mark the Last Delivery box to signify that the line item has received all of the items. ***Important, this will not close out the PO! If you want to completely close out the PO you must complete a POCF and send to your Finance Office department contact.