Shopping Cart: Changing Default Shopping Cart Settings

BEFORE YOU BEGIN
You will need to know what you would like to order, the vendor, and the General Ledger (G/L) account to charge to.

Using Default Shopping Cart Settings
Default Shopping Cart Settings are a new tool that allows you to set up default data that applies to all of the lines in an individual cart. If you routinely process carts with many items, this feature can be a great time-saver.

1. **Create a Cart.** At the Shopping Home Page, click “Create Shopping Cart.”

   **Helpful Hint** You may want to close the “Detailed Navigation” panel on the left side of the screen to give you more room. Do that by clicking on the small ‖ in the top right corner of the panel.

2. **Enter General Data.** The “Create Shopping Cart” screen will appear. Start your order in the “General Data” section of this screen.

   - You may wish to rename the cart to something that you will recognize and that will make it easier for you to locate the cart in the future.
   - Click “Set Values” next to the label “Default Settings” to set the default values that will be carried throughout this cart. For example, you can set up the cost assignment and G/L number, split the cost distribution, and set up the product category for the cart here, and the default data will populate each line in the cart. Note that even after you set the default values, you can still change individual items within the cart to different values. This feature can be a great time-saver for carts with multiple lines.
3. **Change Default Settings.** When the “Change Default Settings” dialog box appears, you won’t see all of the tabs that are available to you. Either stretch the box horizontally so that all of the tabs appear, or just click on the white file folder to display a list of the available tabs. There will be 4 tabs where you can enter data: Item Basic Data, Account Assignment, Internal Note, and Delivery Address/Performance Location.

4. **Item Basic Data.** The “Item Basic Data” tab will appear first by default. The first step is to enter a “Product Category” that will apply to most (or all) of the items in your cart. To locate the correct code, select the file folder icon in the Product Category field.

5. **Search for Product Category.** The easiest way to search for the appropriate Product Category is to click “Start Search” (with no search criteria entered).

   - You’ll see a list of the possible product categories. Click the “Description” heading to put them in alphabetical order.
   - Scroll through the list to select the category that best fits your order and then click the order once to insert it into your default settings.

6. **Account Assignment Tab.** Next, click the “Account Assignment” tab.
7. **Account Assignment.** Use this tab to enter the account assignment information that will apply to most (or all) of the items in your cart.

- Check the cost object under the “Account Assignment Category” header (this field could say Cost Center, Internal Order, or WBS Element) to make sure that it is correct for your order.
- Click in the field under the header that says “General Ledger Account.” Verify the appropriate G/L account with your financial administrator, and then enter it in this field.
- You may also add the fund for WBS Elements in the Default Cart Settings.
- If you would like to split the cost distribution for the entire cart, you may do so by selecting the appropriate method under “Cost Distribution” and then adding cost lines accordingly.
- Click OK to add the account information to your default cart settings.

8. **Internal Notes.** Next, click the “Internal Note” tab to attach an internal note that will apply to your entire order. Note that an Internal Note does not appear on the Purchase Order and can only be viewed by people within Johns Hopkins.

- Type the note in the free text field and then click “OK” when you are finished.
- Note that “Supplier Text” cannot be set within the default cart settings and must be set at the line item level within the shopping cart.

9. **Delivery Address/Performance Location.** There is a 4th tab to the right of “Internal Note” which will not be displayed unless you stretch the dialog box horizontally or click on the file folder icon to the right of the tabs. The pop-up box shown to the right has been stretched to show all of the tabs.

- Click “Delivery Address/Performance Location” to enter a delivery address for most (or all) of your order.
• The delivery address from general Shopping Cart settings will be populated on this screen. If you need to change them, you may adjust any of the fields that are shown in white.

• If you need to look up a new location, click file folder icon in the “Address Search” field.

• Enter search criteria in the fields and then click “Start Search.” Your location should appear in the fields at the bottom of the pop-up window.

• To select a location, click once on the location name. The data will be copied automatically to your default cart settings.

• Make your adjustments and then click “OK” to apply your changes.

10. **Return to Your Order.** When you have finished the Delivery Address tab, you are all finished. Click “OK” to return to your shopping cart.

• Recall that the Default Settings will be applied automatically to every item in your cart. You can change them for individual line items, however, after the settings have been established.