

Financial Processing – Purchasing (PUR)

Shopping Cart

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| Document Summary | |
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| Lesson Objectives | |
|  | On completion of this lesson you should be able to:   * Navigate to Shopping Cart * Search for an Item * Add Items to the Shopping Cart * Checkout the Items * Approve the Order Document |
| Lesson Scenario | |
|  | * As an existing staff member of the NWU you are required to obtaining goods from the different Stores on the KFS system as an Initiator of your Department. |
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| Lesson Prerequisites | |
|  | * You need to be a NWU staff member that is registered on KFS as a user. |

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## Main Menu

**KFS navigation:** **Main Menu >** **Shopping** **>** **Shopping**

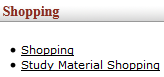


Figure 1

|  |  |
| --- | --- |
| 1. | Click on **Shopping**. |

1. **Shopping Portal Layout**

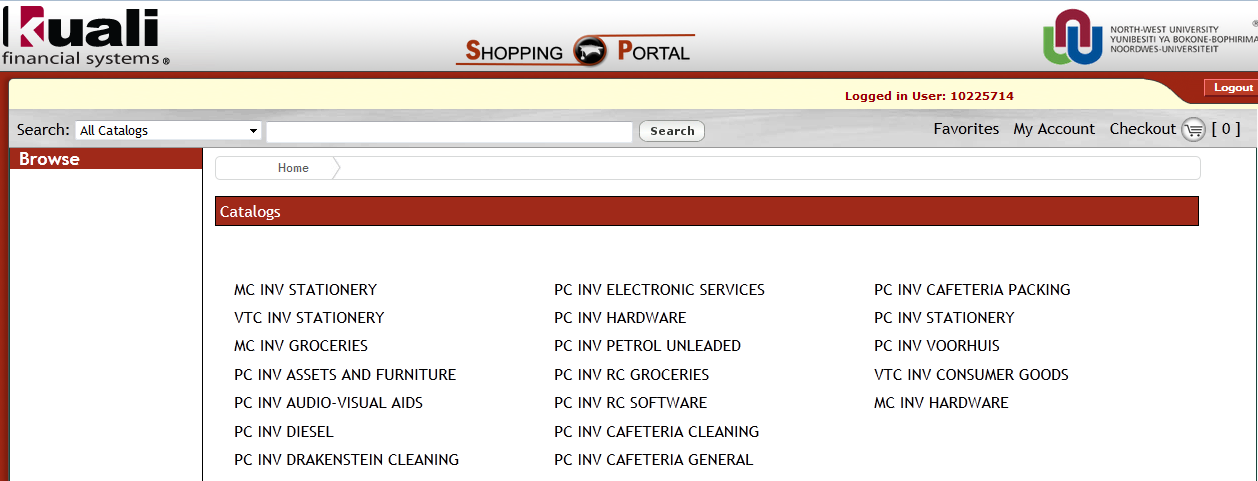


Figure 2

**2.1 Choose a Catalog**

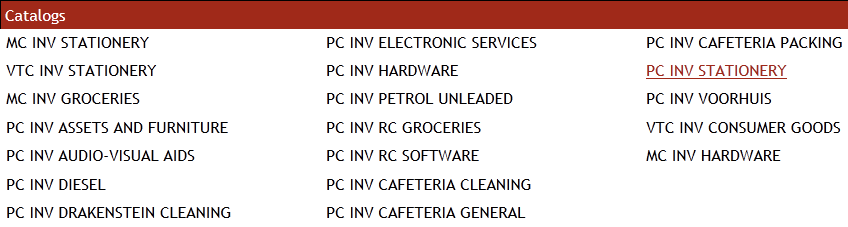


Figure 3

|  |  |
| --- | --- |
| 1. | On the Catalog List appear various stores; select the store relevant to your Campus.  **MC = Mafikeng Campus**  **PC = Potchefstroom Campus**  **VTC = Vaal Triangle Campus** |
| 2. | Choose from the list of Catalogs the store you require, for example, |

**2.2 Choose a Category**

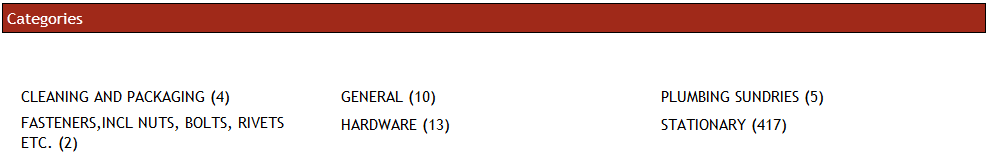


Figure 4

|  |  |
| --- | --- |
| 1. | Choose from the list of **Catagories** a store you want to make a purchase from. For example, |

**2.3 Choose an Item**

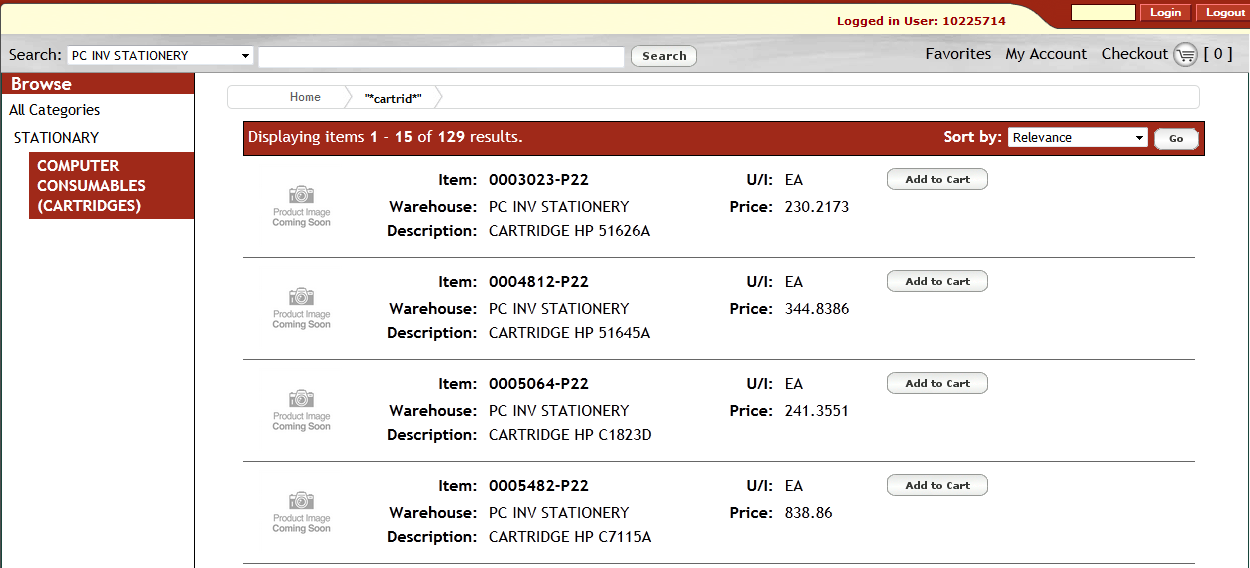


Figure 5

* If you know the item code number, insert the number in the Search field.
* If the number is unknown use the asterisk **(\*)** wildcard to search for the item.
* The **(\*...\*)** asterisk is the wildcard to search on partial descriptions such as **\*cartrid\*** for cartridges or you can choose the catalog group to see all the items in that specific group. For example,





Figure 6

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| 1. | Click on  **>** |
| 2. | Click on **button-addToCart** |

**2.4 Add to a Favorites List**

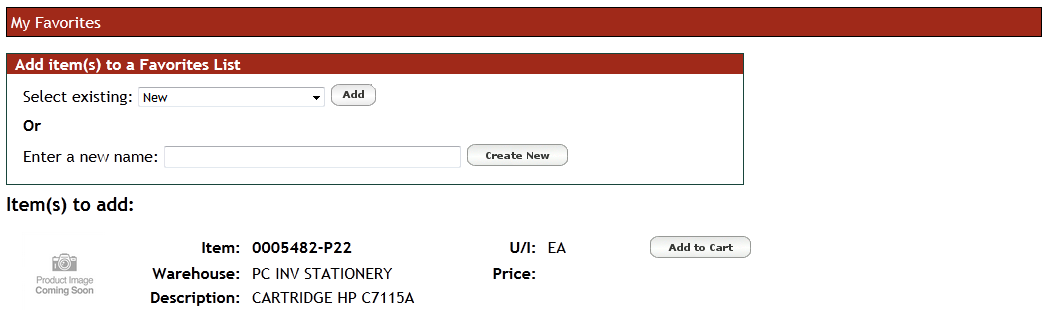


Figure 7

**Add to Favorites:**

* If this is an Item that you purchase regularly and do not wish to re-enter the information again, you could add this to your **Favorites** and it will be available on your favorites list for the next purchase. For example,

|  |  |
| --- | --- |
| 1. | Click on |
| 2. | Type the required name, for example |
| 3. | Click on button-createNew |



Figure 8

**Use the following buttons to:**

|  |  |
| --- | --- |
| 1. | Add a staff member/s to your Favorites list button-addToCart |
| 2. | Remove an existing staff member from your Favorites list button-deleteList |
| 3. | Share your shopping cart with another staff member that is on leave or out of office button-share |
| 4. | View the user favorites list by using the staff member number, for example |

**2.5 Checkout**

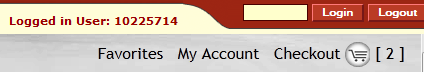


Figure 9

* You must checkout before the shopping cart could be viewed.

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| 1. | Click on |
| 2. | View your cart and click on button-createOrder |

**2.6 View Cart and Create Order**

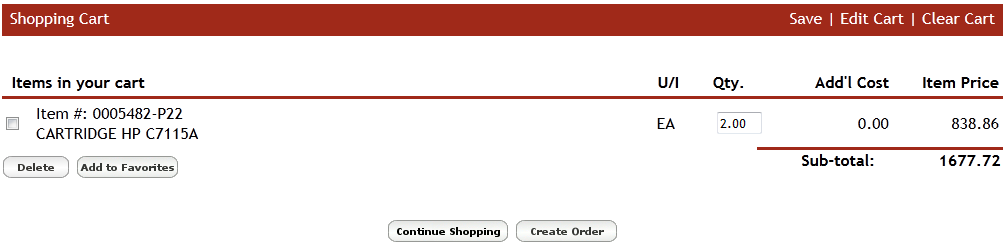


Figure 10

* Item number, description, unit of measure, quantity and total amount are displayed for the item you are purchased.

**Use the following buttons to:  **

* **Save**: Enter a name for your cart in the Save Shopping Cart field, click on 
* **Edit Cart**: If you want to edit the quantity of the item do the changes here. For example,

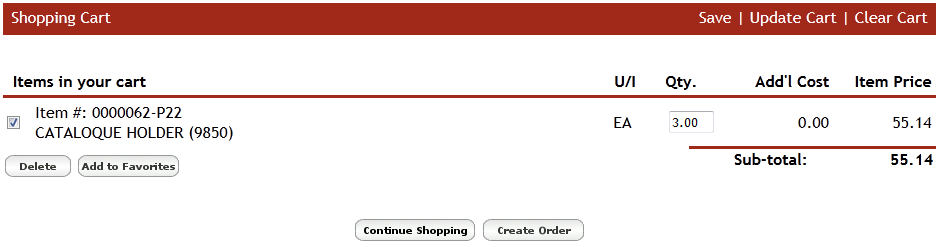


Figure 11

* **Update Cart**: After editing your item quantity, click on  before you Create the order, otherwise will the system creates the order before the items was updated with the new item quantity.
* **Clear Cart**: The cart could also be cleared in total, saved or only deleted certain items from the list of items you don’t want to purchase anymore.

**2.7 View Order Details and click on Submit**

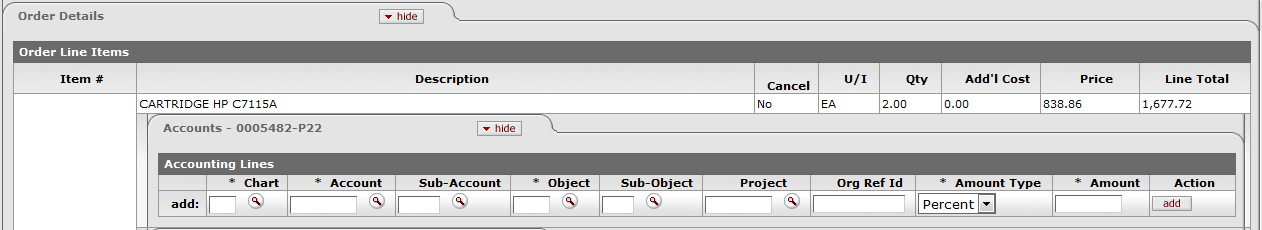


Figure 12

* The accounting populates automatically based on the info of your Profile and item chosen, but could be changed here.
* The process of creation of the store requisition is now ready for submitting.
* When you click on Submit the status of the transaction will change to “**ENROUTE**”
* Click on  that will change the transaction status to “**FINAL**”

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| 1. | Click on **Submit > Reload** |



Figure 13

* The process is now completed. If you have the authority to approve your own purchase, otherwise it would route to the next level for approval.

**Order Number**:

* **Please note** that your Order Number will appear in the **Description field** as well as in the **Order field** of your document. For example,

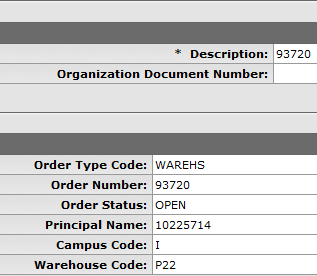


Figure 14

|  |  |
| --- | --- |
| 1. **Lesson Summary** | |
|  | Having completed this lesson you should be able to:   * Navigate to Shopping Cart * Searching for an Item * Add Items to the Shopping Cart * Checkout the Item * Approve the Order Document |