

## What is it?

As you select items from the Marketplace, the Category Codes associated with the product are systematically populated for each item in your cart. In addition, the default Natural Account mapped to the Category Code is populated. You should ensure that the Category Code and associated Account are correct and, if necessary, edit the Category Code and/or Account. Refer to the <u>Procurement Category Codes and Natural Accounts</u> job aid.

## Viewing a Requisition to View Item Category Codes and Natural Accounts

In order to view the Category Codes and Natural Accounts associated with the items you added to your Cart, you must proceed to the Checkout screen to view the Requisition.

Л		art page	, chek the	FIOCEEUIC	Checko	ut button.					
۹ <u>۱</u>	COLUMBIA UNIVERSITY					- IIA	Search (Alt+Q)	99.99 U	30 🖷 🗸		
Ξ.	Shopping Cart • Shopping Cart						۰	Assign Cart	Proceed	d To Checkout	
6	Simple Advanced						- Summary			→	
	Search for products, suppliers, forms, part num	ber, etc.				٩	Details			~	
		nn					For Eric Zaretsky				
	Cart Name 2023-11	-28 e22248 U2					Total (99.99	USD)		~	
	Description						Shipping, Har each supplier	idling, and Tax charges ar . The values shown here a	e calculated and are for estimation	i charged by n purposes,	
ie	Checkout scree	en appea	urs.								
5	COLUMBIA UNIVERSITY					All •	Search (Alt+Q)	Q 99.99 U	ISD 🗑 🤇	∞ ⊨ ♦	1
	Requisition • 3913125						۲	🖶 🕐 … 🔺	kssign Cart	Place Order	
	Summary PO Preview Comm	ents Attachment	s History								
5	General		Shipping	¢	Billing	¢	, Summary	Deaft		→	
	Cart Name 2023-11-28 ez2248 02		Ship To		Bill To		🙁 Correct t	these issues.		~	
	Description no value		no address		no address		You are u	unable to proceed until addr	vessed.		

1. On the Shopping Cart page, click the **Proceed to Checkout** button.

2. Scroll down to view the items in your Requestion.

1	Moleskine Classic Har (893601)	d Cover Notebook, 5° x 8.25°, Sapphire Blue	2071318	EA	16.87	1 EA	16.87	🗌
								1
	Manufacturer Name	HACHETTE BOOK GROUP	Contract:	no value	Capital Expense?	No		_
	Harrie		Category Code	Z1000000 / Business Services- Other	Asset Profile ID	no value		
	Manufacturer Part Number	893601	Account	61405 SUPPLIES AND MATERIALS-GENERAL	Asset Location	no value		
	Supplier Part Auxiliary ID	2071318						
	more info							

If the Category Code and Account values are correct for the item, no further action is required.

**Editing the Category Code or Natural Account** 

1. To edit, click the Edit Line 🖍 icon. The Edit Line Details window appears.

Edit Line 1: Item Details					×
1 Moleskine Pro Pad, Pocket, Black (620909)		24324081 EA	7.09	Qty: 1 EA	7.09
Contract:		Capital Expense?	No	×	
Category Code 🖈	Z1000000	Asset Location	Search	Q	
Account 🖈 6	51405 Q				
				Save	Close

2. Search and select the **Category Code**.

mmodity Code Search		×
Code starts with	office supplies	Filter
		Clear All Filters
Code ↑	Description	
44120000	Office supplies	+
		Close

After you enter or select the new Category Code, the Account field will initially appear to not update, but will update after saving with the default Account associated with the new Category Code.

 Click Save. The Category Code and the Account field will be updated. If you need to change the Account from the default, reopen the Edit Line Details window to select from the Accounts mapped to the Category Code.

## Where do I get help?

Please contact the Finance Service Center http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now https://columbia.service-now.com