

Shopper Role/Assigning Carts

If you only have a shopper role in eMarketplace, you must assign your cart to a requestor with maintenance access to the funds. Once the cart has been assigned, the requisitioner can place the order.

1. Start by setting up your Profile defaults (See **User and Profile Setup** instructions).
2. Create the order using the Training Materials/How-Tos: **Ordering** instructions.
3. With the **Active Cart** selected, give the cart a name by entering it in the **Cart Name** text box and click **Save**. Note: Naming the cart according to what you are purchasing might be helpful. You can also give the cart a description, but neither is required.

UNC Greensboro
eMarketplace

Ricky Requestor | Action Items 1 | Notifications | 1.00 USD

Shop / My Carts and Orders / Open My Active Shopping Cart / Cart - 966655 - Draft Requisition

Continue Shopping

1 Item(s) for a total of 1.00 USD

Shopping Cart for Ricky Requestor

Proceed to Checkout or Assign Cart

Add Non-Catalog Item

Save

Cart Name: Office supplies

Description:

Priority: Normal

Name the cart & click Save

4. Click **Proceed to Checkout** to edit the order information.

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Ricky Requestor | Action Items 1 | Notifications | 1.00 USD

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Continue Shopping

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Shopping Cart for Ricky Requestor

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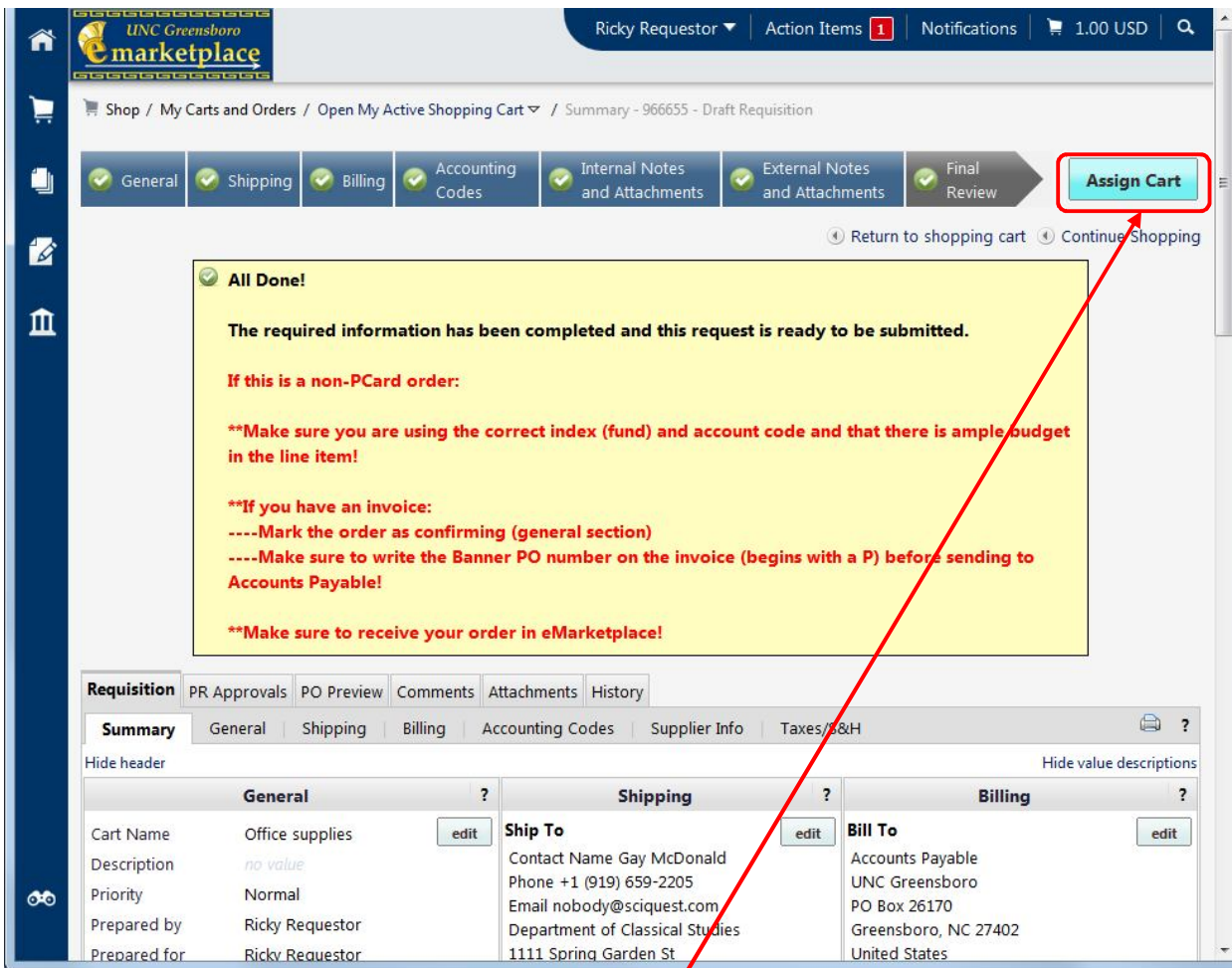
Save

Cart Name: Office supplies

Description:

Priority: Normal

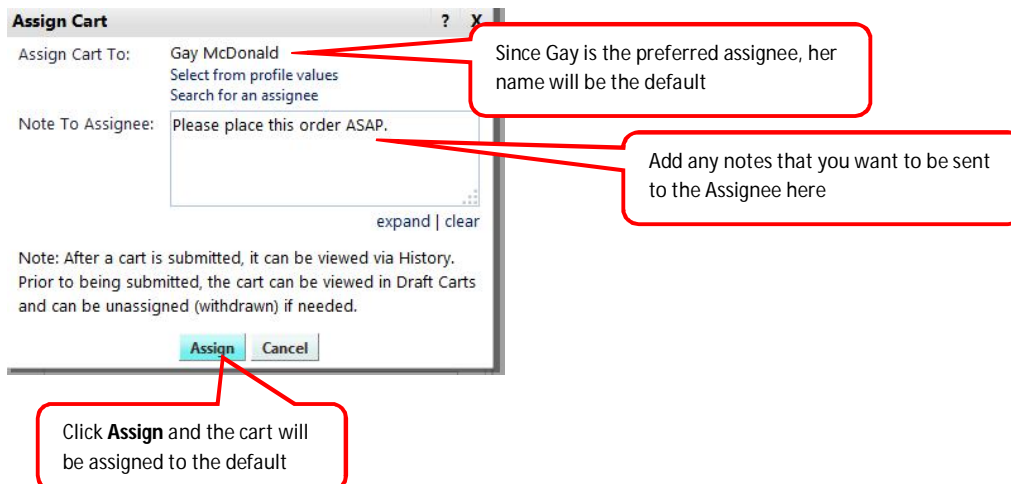
5. Once you have finished reviewing the order for any error messages, you are ready to assign the cart to a requestor.



- Notice that you only have the option of assigning the cart. You don't have the option to place the order. As a shopper, you must assign the cart to a requestor to place the order for you by clicking **Assign Cart**.

6. You have 3 options:

- (1) Click **Assign** to assign the cart to the defaulted preferred assignee (See **Profile/Creating Assignees**)



- (2) Click **Select from profile values** and select another assignee that has already been created (**Profile/Creating Assignees**) from the dropdown.

The screenshot shows the 'Assign Cart' dialog box. The 'Assign Cart To:' field is set to 'Gay McDonald'. A dropdown menu is open, showing 'Sandy Rogerson' and 'Gay McDonald'. A red callout points to the dropdown with the text: 'Select the person's name who you want to assign the cart to'. The 'Note To Assignee:' field contains the text 'Please place this order ASAP.'. A red callout points to this field with the text: 'Add any notes that you want to be sent to the Assignee here'. At the bottom, there are 'Assign' and 'Cancel' buttons. A red callout points to the 'Assign' button with the text: 'Click **Assign** and the cart will be assigned to the selected assignee'. Below the dialog box, there is a note: 'Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.'

- (3) Click **Search for an assignee**.

The screenshot shows the 'Assign Cart' dialog box. The 'Assign Cart To:' field is set to 'Gay McDonald'. Below it, there are two options: 'Select from profile values' and 'Search for an assignee'. A red callout points to 'Search for an assignee' with the text: 'Click here to search for an assignee'. The 'Note To Assignee:' field contains the text 'Please place this order ASAP.'. At the bottom, there are 'Assign' and 'Cancel' buttons. Below the dialog box, there is a note: 'Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.'

- A User Search box is displayed. Click in the **Last Name** text box and enter the user's last name then click **Search**.

The screenshot shows the 'User Search' form. It has several input fields: 'Last Name' (containing 'Rogerson'), 'First Name', 'User Name', 'Email', 'Department' (a dropdown menu), and 'Results per page' (set to '10'). A red callout points to the 'Last Name' field with the text: 'Enter the **Last Name** of the person who you want to assign the cart to here'. At the bottom, there is a 'Search' button. A red callout points to this button with the text: 'Click **Search**'.

- Select the name of the person you want to assign the cart to by clicking the **Select** link in line with the user's name. Then click **Choose Selected User**.

Results per page 10 Users meeting the search criteria: 2 Page 1 of 1 ?

Name	User Name	Email	Phone	Action
Rogerson, Sandy	slroger2	slroger2@uncg.edu	+336 (334) 3858	[select]

Select the user here

- You can enter notes for the assignee. The assignee will receive an email notification with your notes and the notes will also be saved in the Comments section of the requisition.

Assign Cart To: Sandy Rogerson
Select from profile values
Search for an assignee

Note To Assignee: Please place this order ASAP

expand | clear

Note: After a cart is submitted, it can be viewed via History.
Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Enter your comments for the assignee here

- Click **Assign** and the cart will be assigned to the selected user.

Assign Cart To: Sandy Rogerson
Select from profile values
Search for an assignee

Note To Assignee: Please place this order ASAP

expand | clear

Note: After a cart is submitted, it can be viewed via History.
Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

Assign Cancel

Click here to assign to the selected user

The cart has now been assigned to the selected user with your comments.....

Shopping Cart Information ?

Congratulations! Your cart was successfully assigned for further review.

At this point, you can view the cart in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via requisition history search.

You included the following note for the assignee:

Please place this order ASAP.

Here is a brief summary of the requisition you have assigned:

Requisition number	966655
Cart name	Office supplies
Requisition total	1.00 USD
Number of line items	1

...and listed in draft carts as **My Drafts Assigned to Others**. You will receive an email notification (See Turning off email notifications) when the order has been submitted by the person to whom you assigned the cart.

My Drafts Assigned to Others legend ?

View Cart	Cart Number	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	966655	Office supplies	5/8/2013	Gay McDonald	1.00 USD	Unassign

home/shop | favorites | forms | **carts** | history | settlement | profile | more >> ?

active cart | **draft carts** | assigned carts | favorites | my requisitions

Create Cart

Assign Substitute

My Drafts Assigned to Others legend ?

View Cart	Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	Office supplies	10/7/2010	Gay McDonald	101.82 USD	Unassign

NOTE: The cart will be listed in My Drafts Assigned to Others until the order has been placed by the Assignee. If you can see the cart listed, the order has not been placed and can be unassigned (withdrawn). Once the order has been placed, the cart will no longer be listed in My Drafts Assigned to Others and cannot be unassigned (withdrawn).

1. To unassign (withdraw) a cart listed in My Drafts Assigned to Others....

Click the **cart** icon.

UNC Greensboro marketplace

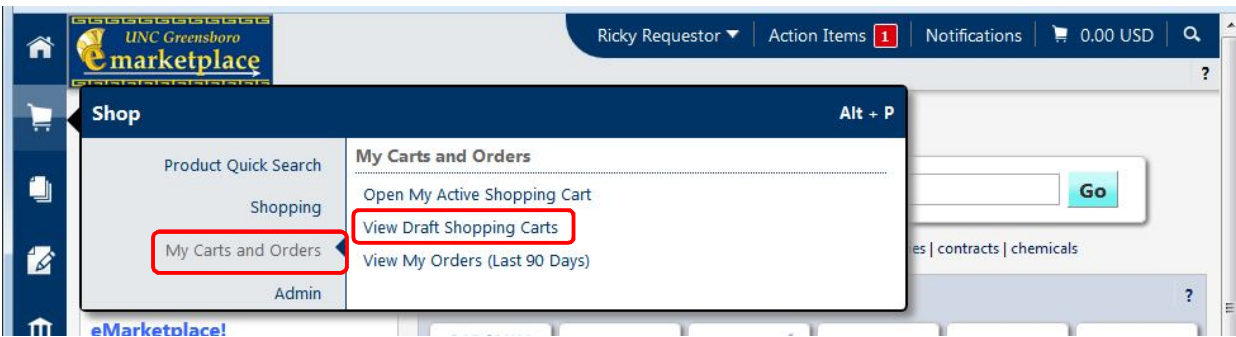
Ricky Requestor | Action Items 1 | Notifications | 0.00 USD

Home / Shopping Home / Home/Shop

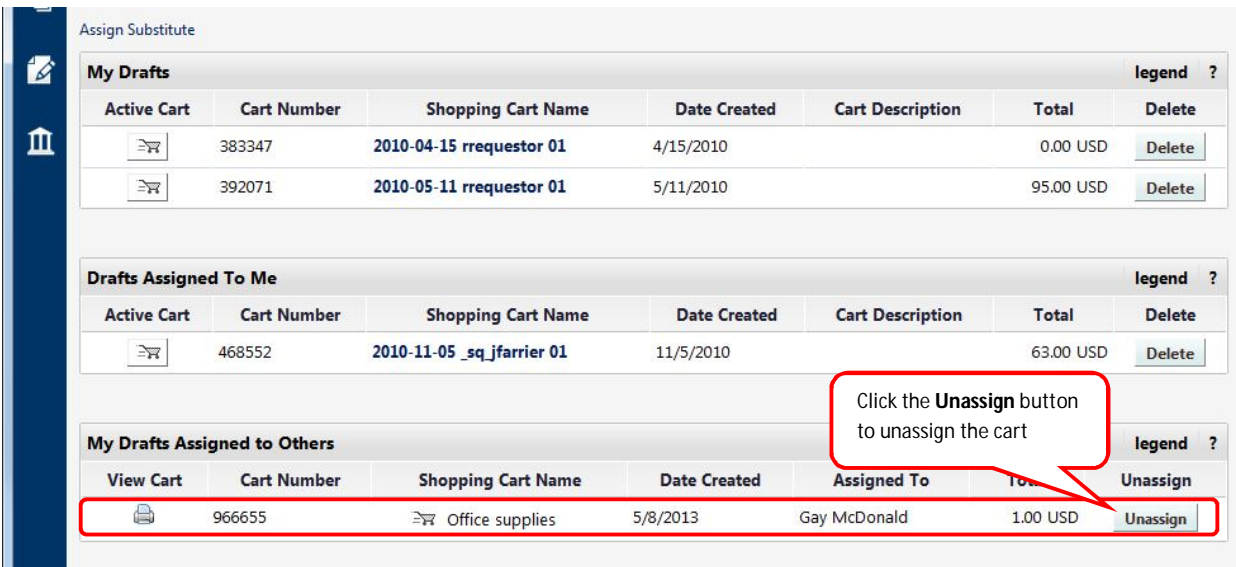
Shop Everything [Go]

The cart icon in the top left navigation bar is highlighted with a red box.

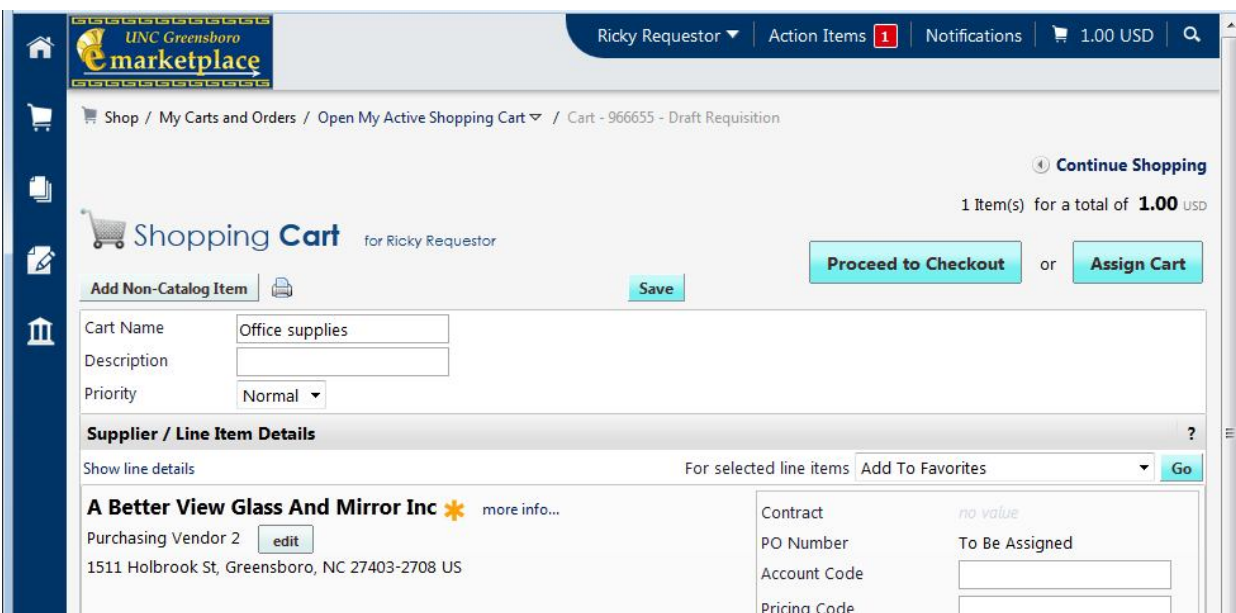
2. Hover over **My Carts and Orders** with your mouse and select **View Draft Shopping Carts**.



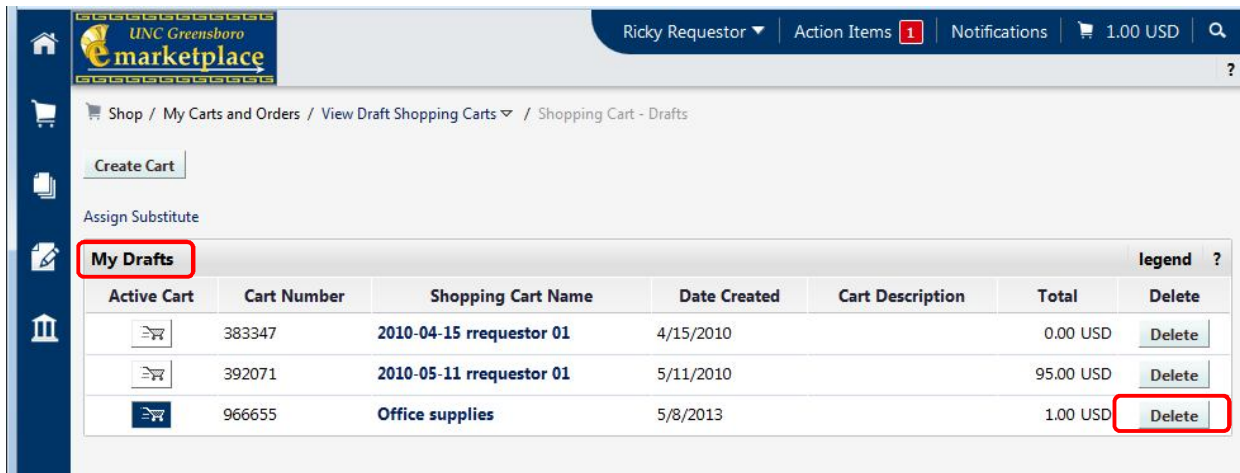
3. Click the **Unassign** button in line with the cart you want to unassign.



4. The draft requisition becomes your active cart. You can modify the cart and assign it again to the same person or to someone else using Step 6 above....



...or if you no longer want to place the order, you can delete the cart by clicking the Delete button in draft carts.

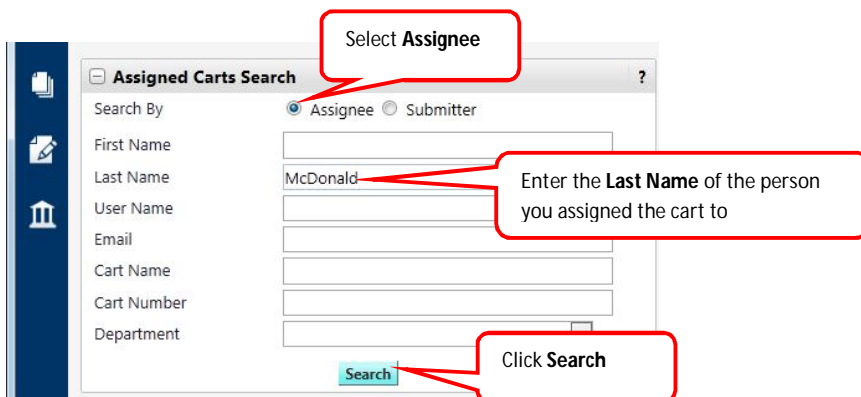


You can view any carts that you have submitted to another person.

1. Hover over the **cart** icon and **Admin** and then select **Manage Assigned Carts..**



2. With **Assignee** selected, enter the last name of the person to whom you assigned the cart in the **Last Name** field and click **Search**. (NOTE: You can also search for an Assignee using any of the other search criteria listed on the 'Assigned Carts Search'.)



3. You are returned a listing of carts that have been assigned to the selected **Assignee**.

The screenshot shows the 'UNC Greensboro marketplace' interface. At the top, there is a navigation bar with 'Ricky Requestor', 'Action Items' (with a red notification icon), 'Notifications', and '0.00 USD'. Below this is a breadcrumb trail: 'Shop / Admin / Manage Assigned Carts / Assigned Carts'. A search bar labeled 'Assigned Carts Search' is present. To the right, there is a 'Reassign Selected Carts' dropdown and a 'Go' button. Below the search bar, it shows 'Results per page: 20' and 'Total No Of Assigned Carts: 1'. The main content is a table with the following data:

Assignee Name	Submitter Name	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	
Gay McDonald	Ricky Requestor	966655	Office supplies	5/8/2013		1.00 USD	<input type="checkbox"/>