

Step-by-Step Guide

Assigning Shopping Carts



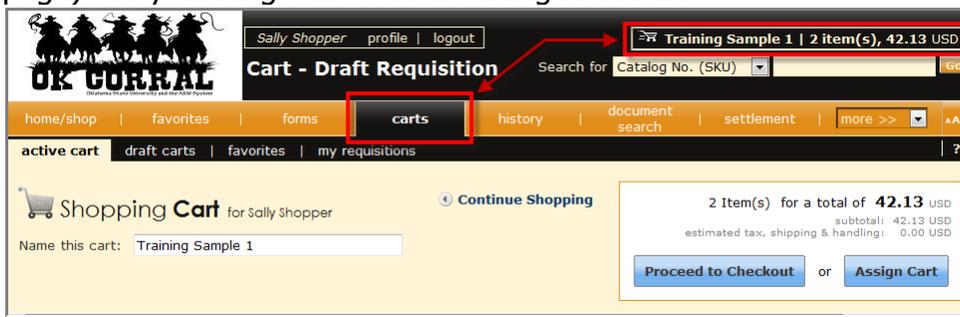
In This Guide

- ✓ Setting up default shopping cart assignees (requesters)
- ✓ Assigning shopping carts to a requester
- ✓ Entering comments for the requester

This guide demonstrates a shopper submitting a shopping cart to a requester for review and checkout processing. (Note: A shopper or requester can assign a shopping cart to himself/herself.)

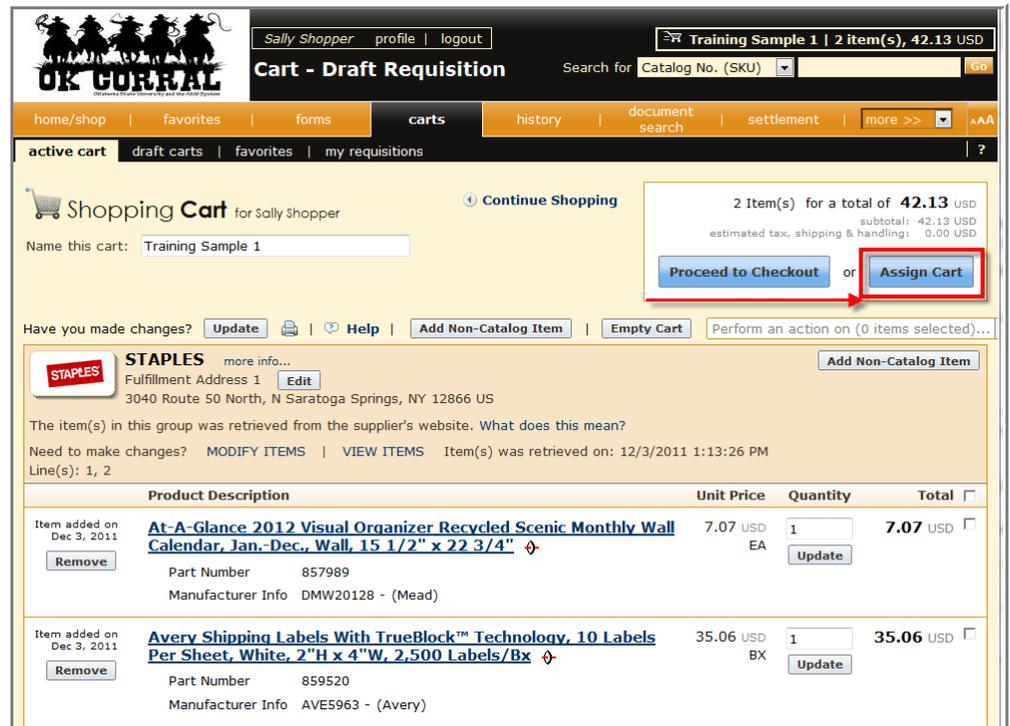
Procedure

1. Access your active cart by clicking the shopping cart link (in the upper right corner of the page) or by clicking **carts** on the navigation bar.



If you do not need to make any changes to the items in your shopping cart; you are ready to assign your shopping cart to a requester.

2. Click the **Assign to Cart** button.



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3. There are three options to designate an assignee (requester). Your **Assign Cart** window may display all or a variation of these options depending on your configuration.

Assign Cart ? X

Assign Cart To: [Select from profile values](#)
[Search for an assignee](#)

Note To Assignee:

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 Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

- Default assignee: If you have previously identified a *preferred* assignee in your profile, that person's name will automatically appear here. If correct, go to step 7.
 - **Select from profile values** link: If you have previously identified assignee(s) in your profile, you can click this link to select from your list; go to step 5.
 - **Search for an assignee** link: If you have not identified any assignees in your profile – or if you want to assign a cart to someone not in your profile list – you can click this link to search from the University-wide list of requesters.
4. If needed, click the **Search for an assignee** link and search for your assignee using the **User Search** criteria. You can enter all or part of the Name, User Name, or Email.
5. From the results, click the **select** link to select your assignee.

New Search Close

Results per page 10 Users meeting the search criteria: 3 Page 1 of 1 ?

Name	User Name	Email	Phone	Action
Requestor, Joe	jrequestor	jrequestor@sciquest.com		[select]
Requestor, Justin	jrequester	jdiana@sciquest.com		[select]
Requestor, Roger	roger_requestor	dj_mckee@bellsouth.net		[select]

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- Back on the **Assign Cart** window, you can check the **Add to Profile** box if you plan to use this assignee in the future.
- If desired, enter comments to your requester regarding this shopping cart in the **Note To Assignee** box.
- Click the **Assign** button.

Assign Cart ? X

Assign Cart To: Roger Requestor
Search for an assignee
 Add to Profile

Note To Assignee:

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

A congratulatory message appears, along with a summary of your requisition.

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.

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

Requisition number	678274
Cart name	Training Sample 1
Requisition total	42.13 USD
Number of line items	2

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)

- ▲ The OK Corral sends an email notification of the assigned shopping cart to your requester.
- ▲ The OK Corral will also send you an email notification when the requester submits your requisition for approval or deletes your shopping cart.

You have successfully assigned a shopping cart to your requester.

Your Next Step

- ✓ To continue shopping, click the **Create new draft cart** link.
- ✓ To review, print or unassign a shopping cart, go to **carts** ⇌ **draft carts**.
- ✓ See the *Unassigning Shopping Carts* guide for detailed instructions on how to unassign a shopping cart from a requester.