

Cart Management

1. A powerful function of ShopBlue is the “Shopping Cart” system, which allows the user to perform a number different tasks. From the “Shop” home page there are several ways to view your carts, making it very easy to access from anywhere in ShopBlue. Once you have explored the various ways to navigate to your shopping carts, click “View Carts” (Figure 1).

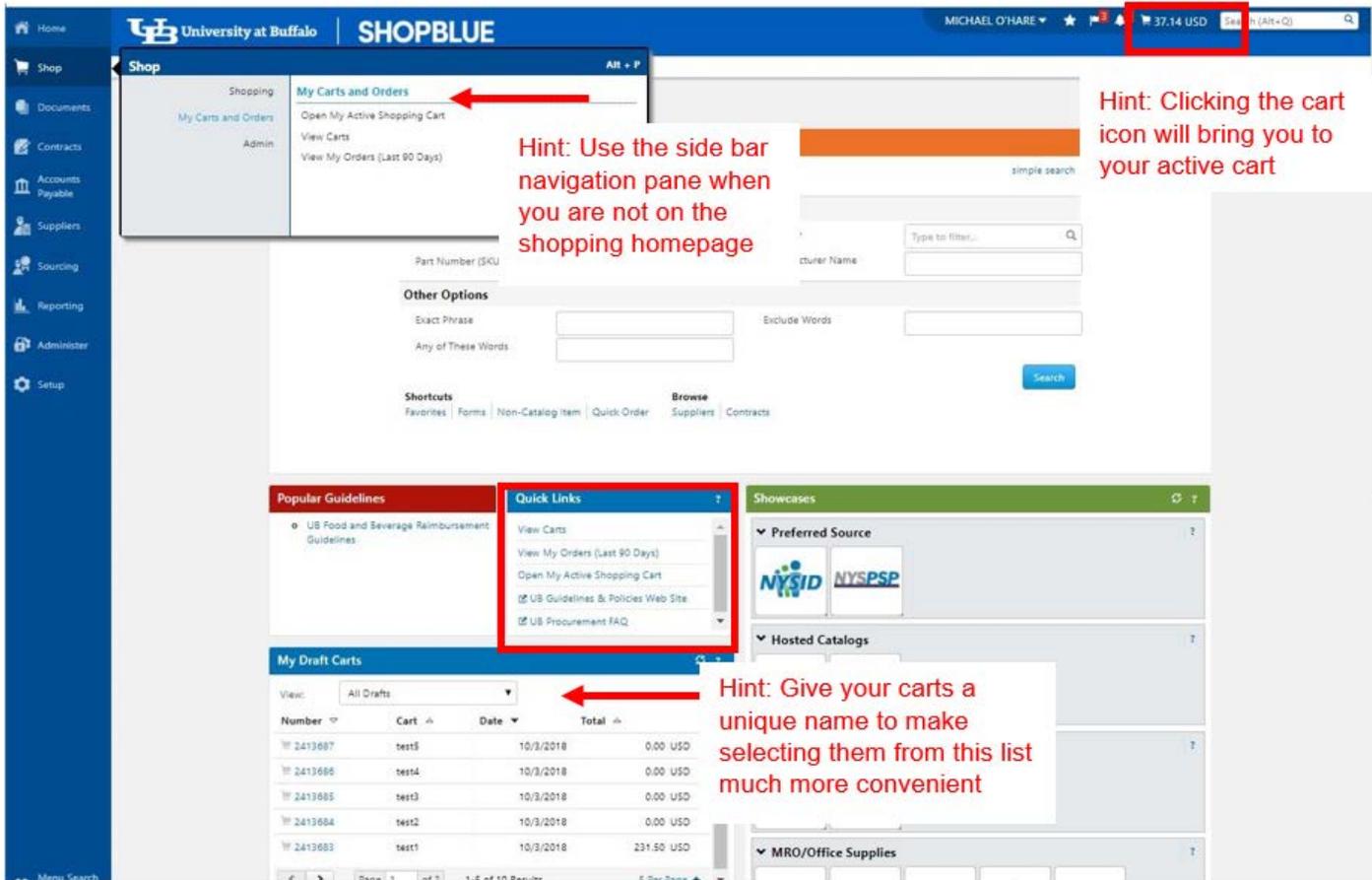


Figure 1

2. After you have clicked “View Carts,” you will be brought to the “Cart Management” page. You will notice along the top of the page that there are three sub headers, “Draft Carts,” “Assigned Carts” and “Shared Carts.” In this instructional we will only be looking at how to manage “Draft Carts” and “Assigned Carts.” To learn more about “Shared Carts,” check out our Instructional entitled “Share a Cart.” To start our exercise, click “Create Cart” (Figure 2).

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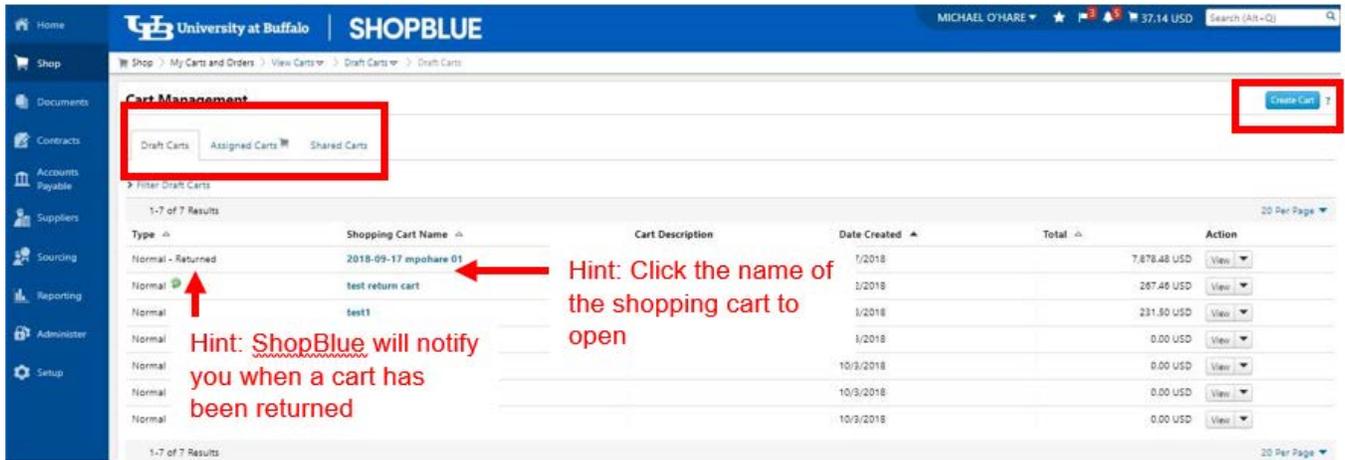


Figure 2

- When you click “Create Cart” you will be brought to the “Shopping Cart” screen. Give your cart a unique name then click “Update.” To return to the “Cart Management” page, select “Open My Active Shopping Cart” in the top left corner and click “View Carts” (Figure 3).

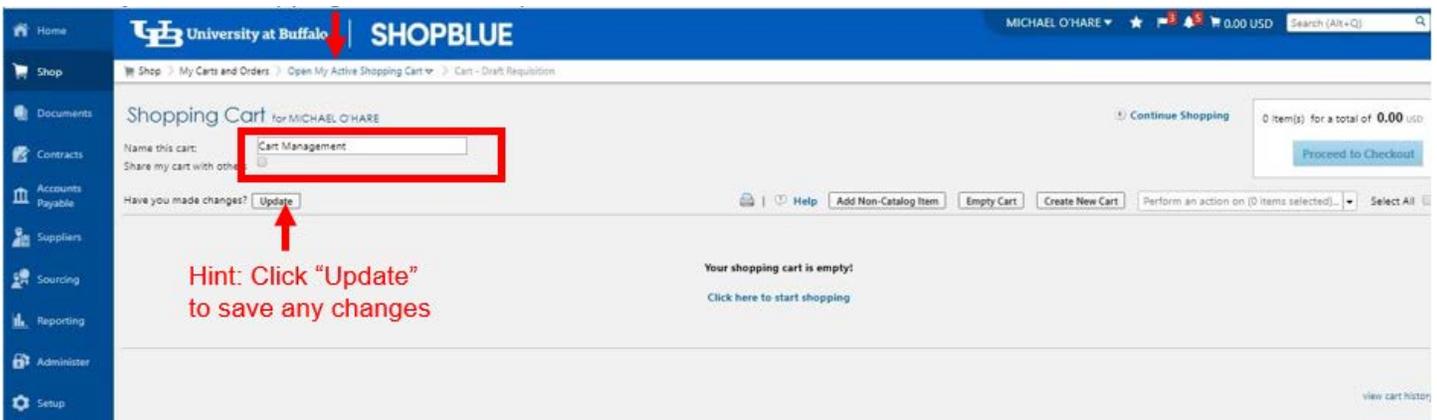


Figure 3

- You will notice that when you return to “Cart Management,” the new cart you created will now be set as your active cart. To change your active cart, click the arrow next to “View” of the cart you would like to make active (Figure 4). When a cart is set as your active, all of the items you add will be put into that cart.

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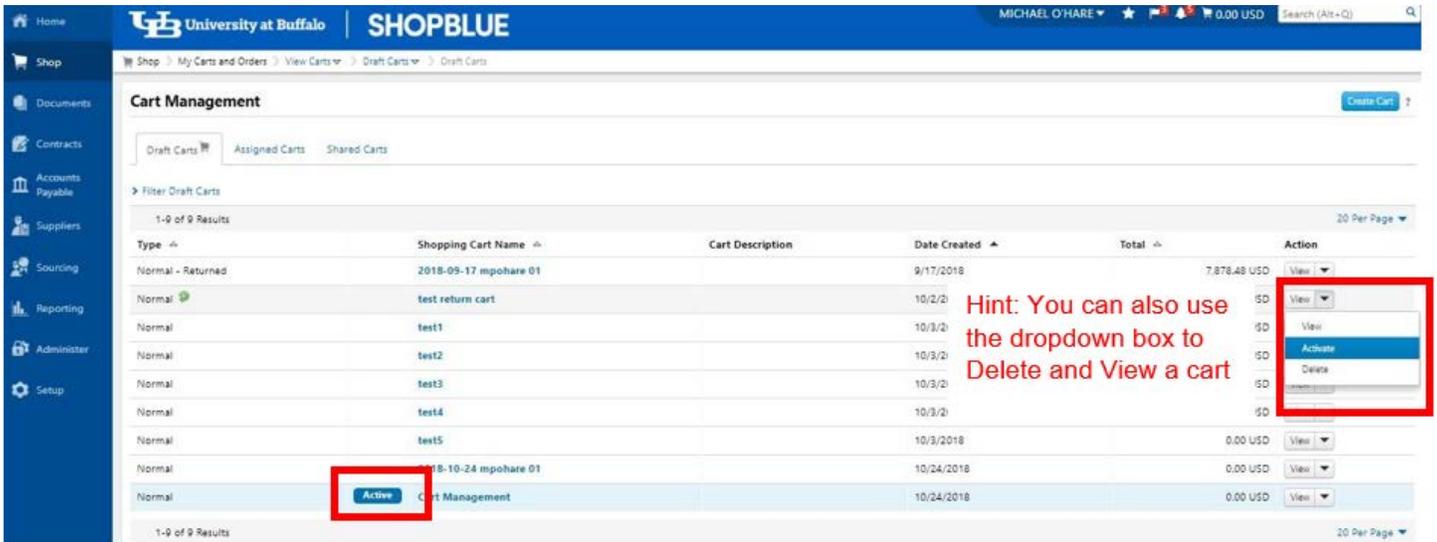


Figure 4

- When you have added your desired items to the shopping cart, click the shopping cart icon in the right hand corner and select “View My cart.” When you return to the “Shopping Cart” page, you will notice that the field of the cart is now populated with the items you would like to order (Figure 5).

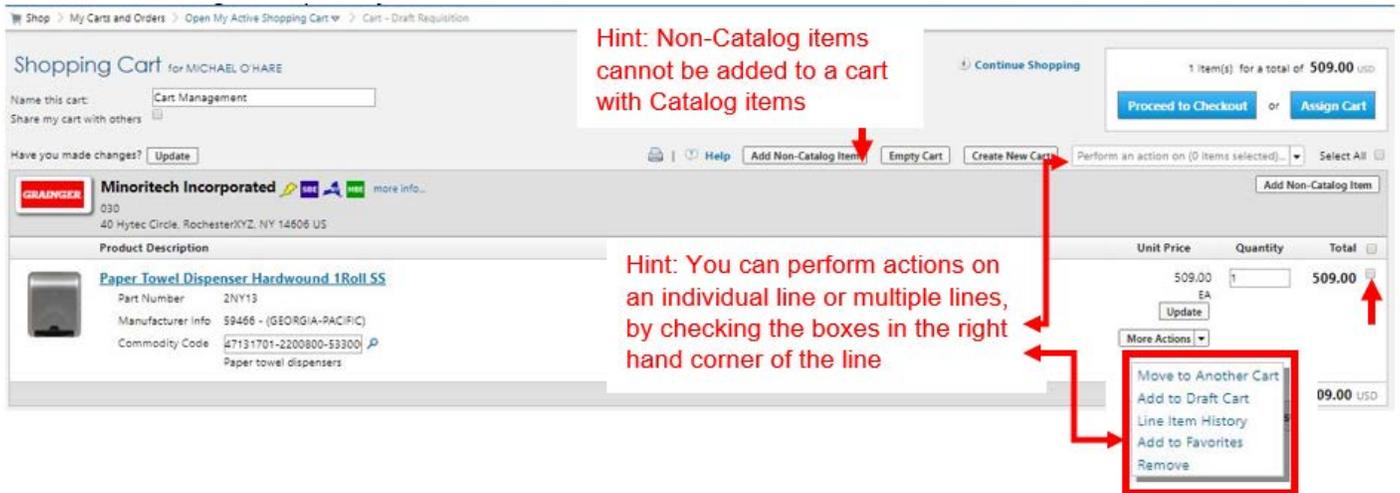


Figure 5

From this page, you can perform actions like, change the quantity, move items to another cart, create favorites or remove items. More action terms include:

- Move to Another Cart – this action will move your selected lines to another cart and removes them from the cart you are currently in. Items can be moved to either a new cart or an already existing cart.
- Add to Draft Cart – this action will move your selected lines to another cart, without removing it from the cart you are currently in.
- Line Item History – this action allows you to see the changes made to a line while the cart has been assigned.
- Add to Favorites – this action allows you to bookmark your commonly used items. To view your favorites, click the “Shop” fly out menu in the left hand corner select “View Favorites” and choose from your list of favorites.

- Remove – this action removes your selected line(s) from the cart.

6. After you have modified your cart to your liking, you will have to decide whether you would like to “Proceed to Checkout” or “assign Cart” to a colleague (Figure 6).



Figure 6

7. If you decide to check out, you will be prompted to complete the requisition and place the order. However, if you would like to assign your cart to another person, then you will be prompted to search for an assignee. The quickest way to search for another person, is using their last name or email address (do not include the @buffalo.edu part of the e-mail address). To begin a search, click “Search for an assignee” (Figure 7).

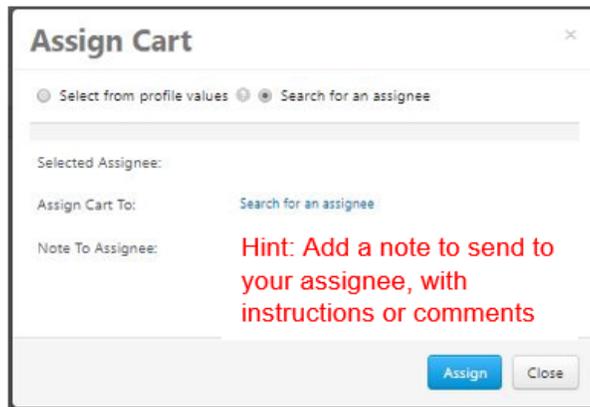


Figure 7

8. If you would like to create your own custom list of assignees, click your name in the right hand corner and select “View My profile,” then click “Default User Settings” and select “Cart Assignees.” From this page you will be able to add or remove assignees and set one of them as your preferred assignee (Figure 8).

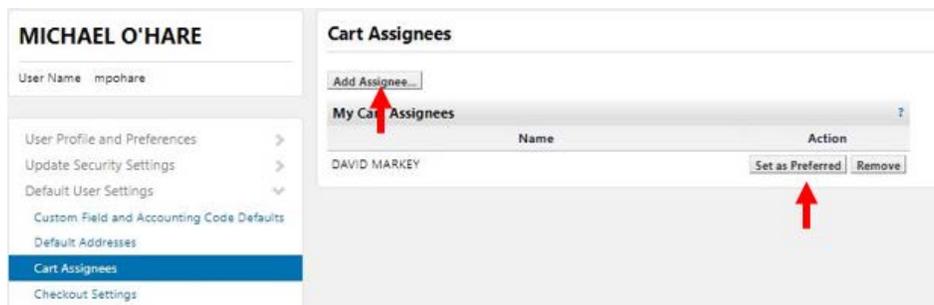


Figure 8

9. To see a cart that has been assigned to you or a cart that you have assigned to someone else, return to the “cart management” page and select “Assigned Carts.” To view a cart that has been assigned to you, click “View” under the “Action” heading, and then again click “View” (Figure 9).

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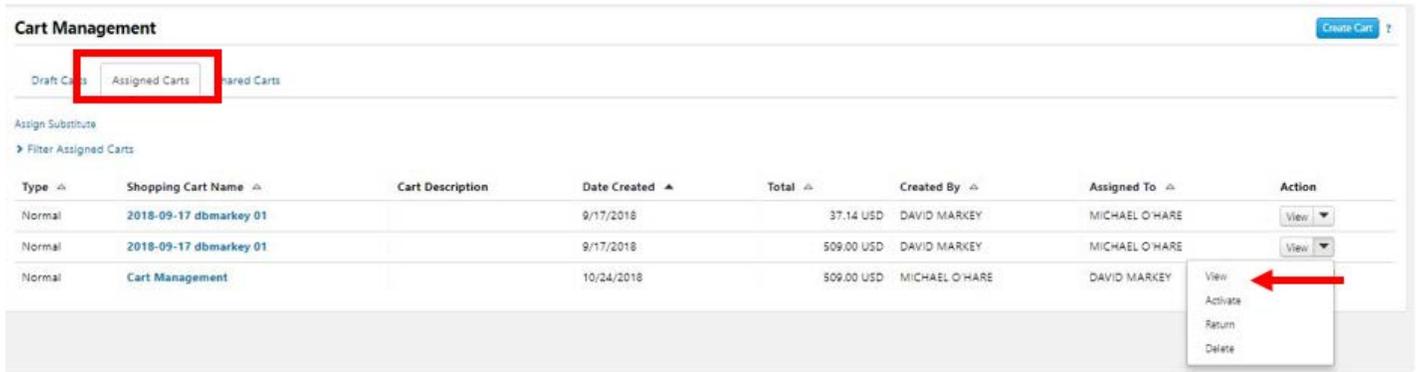


Figure 9

10. When you have completed work on your assigned cart, you will have three options moving forward. Your first option is to “Proceed to Checkout,” your second option is to “return Cart” to the requestor and your last option is to “Assign Cart” to another person (Figure 10).



Figure 10

11. If you have assigned a cart and would like to unassign it and bring it back to your inbox, simply click the “View” button under “actions” and select “unassign” (Figure 11).

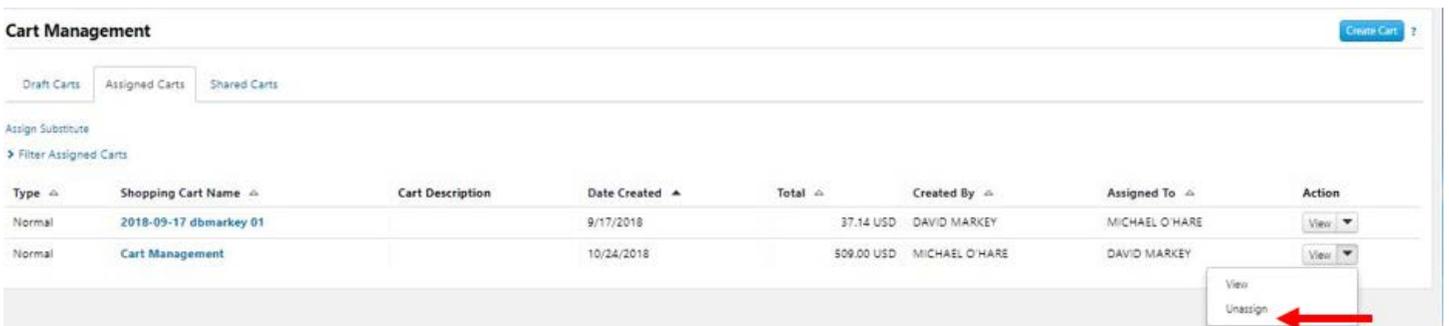


Figure 11

12. If you would like to copy an entire Requisition to a new cart; start by selecting “Document Search” from the “Document” fly out menu, then click “My Requisitions” and select the requisition you would like to view. Under “Document Actions,” select “Copy to New Cart” (Figure 12).

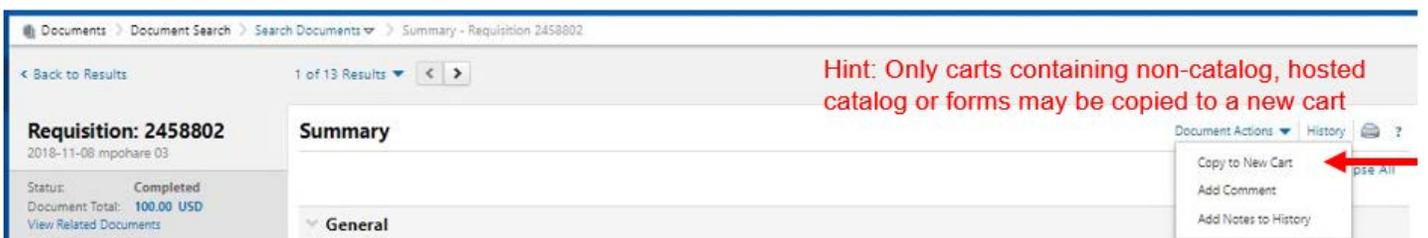


Figure 12