

SHOPBLUE

Preparing a Requisition on Behalf of Another User

1. After completing your shopping, select **Proceed to Checkout** (Figure 1).

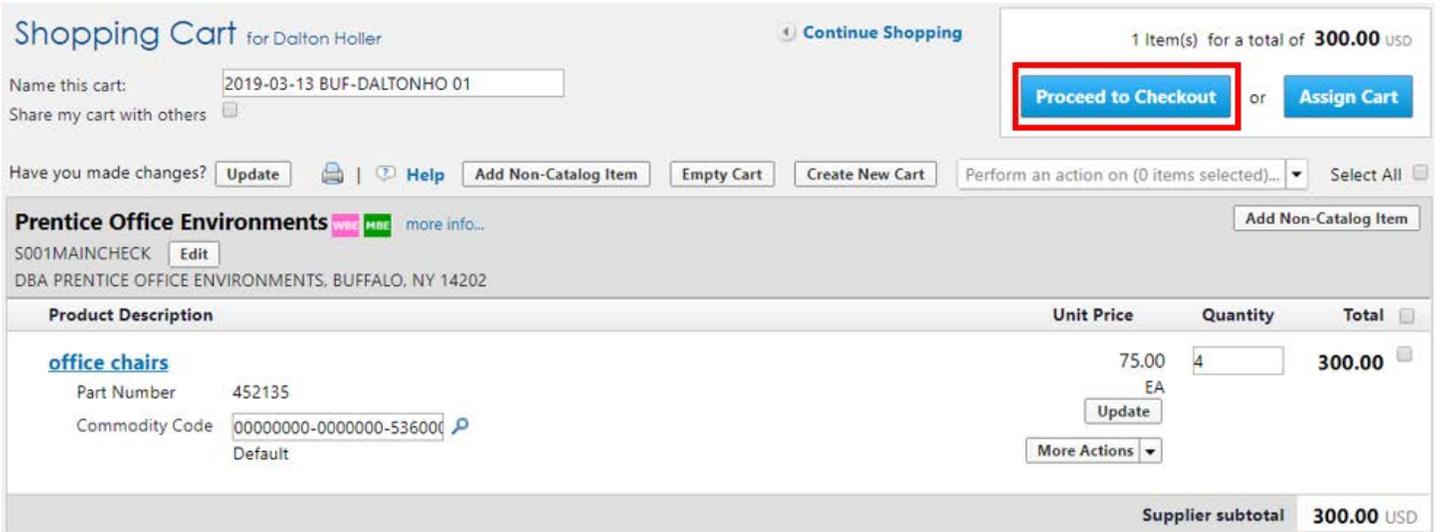


Figure 1

2. During checkout, in the "General" tab, select **Edit** (Figure 2).

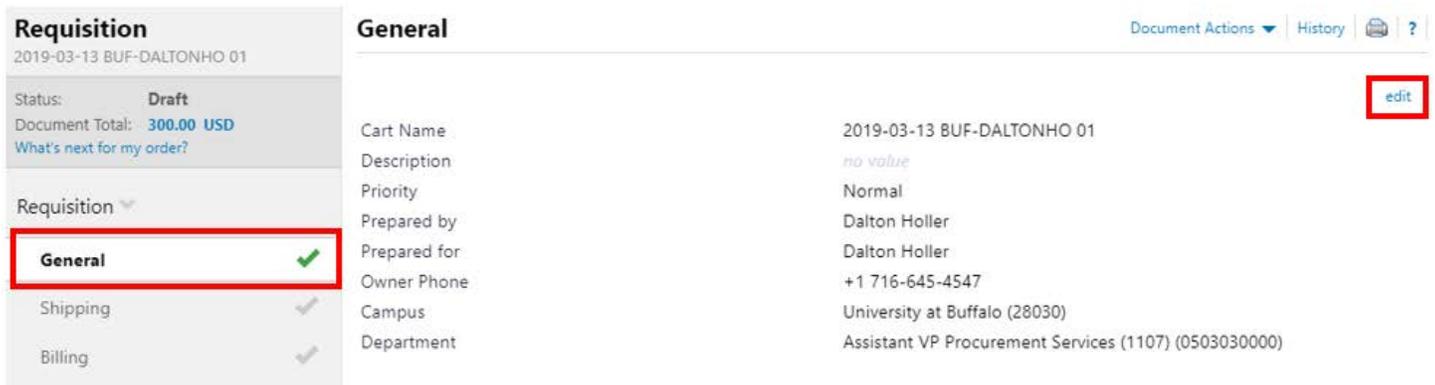


Figure 2

3. A pop up menu will appear. In the "Prepared for" row, click **Select a different user...** (Figure 3).

(Note: the default prepared for user will always be the person creating the requisition.)

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General	
Cart Name	2019-03-13 BUF-DALTONHO 01
Description	
Priority	Normal ▾
Prepared by	Dalton Holler
Prepared for	Dalton Holler Select a different user...
Owner Phone	+1 716-645-4547
Campus	University at Buffalo (28030)
Department	Assistant VP Procurement Services (1107) (0503030000)

Update **Cancel**

Figure 3

4. In the User Search window, enter the search criteria to search for the appropriate user. Once complete, select **Search** (Figure 4). *Note: not all the criteria needs to be completed. See in the example below, only the user's last name was used to search.*

User Search

Last Name ?	Meadows
First Name ?	
User Name ?	
Email ?	
Campus ?	University at Buffalo (28030)
Department ?	
Role ?	
Results Per Page	10

Search

Figure 4

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5. After searching, select the appropriate user by clicking **[select]** under the “Action” column (Figure 5).

Name ▲	User Name ▲	Email ▲	Phone	Action
Meadows, Alison	BUF-ALISONMA	alisonma@buffalo.edu	+1 716-645-4521	[select]

Figure 5

6. Once the Prepared for user has been selected, select **Update**. Notice the prepared for user has been updated (Figure 6).

General [?] [X]

Cart Name: 2019-03-13 BUF-DALTONHO 01

Description: [Empty]

Priority: Normal ▼

Prepared by: Dalton Holler

Prepared for: Alison Meadows
[Select a different user...](#)

Owner Phone: +1 716-645-4547

Campus: University at Buffalo (28030)

Department: Assistant VP Procurement Services (1107) (0503030000)

Update Cancel

Figure 6

7. Now that the requisition has been prepared for on behalf of another user, you can complete the checkout process (Figure 7). *Hint: when a requisition is prepared for on behalf of another user, the prepared for user’s saved ship to addresses will be available to user entering the requisition. Additionally, the prepared for user will receive the notifications for the requisition.*

Requisition

2019-04-01 BUF-DALTONHO 01

Status: **Draft**

Document Total: **300.00 USD**

[What's next for my order?](#)

Requisition ▼

- General ✓
- Shipping** ✓

Shipping

[Document Actions](#) | [History](#) | | [?](#)

Ship To edit

Shipping address

Attn: ALISON MEADOWS
UB
Bldg: 224
Room: Crofts
North Campus
Buffalo, NY 14260
United States

Figure 7

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8. Once all fields are completed, you can complete your order by selecting Place Order (Figure 8).

The screenshot shows the ShopBlue interface for a requisition. At the top, the University at Buffalo logo and 'SHOPBLUE TEST' are visible. The user is identified as Dalton Holler. The navigation path is: Shop > My Carts and Orders > Open My Active Shopping Cart > General - Draft Requisition. A green banner states 'This order is ready to be placed.' with 'Place Order' and 'Assign Cart' buttons. The 'Place Order' button is highlighted with a red box. On the left, a 'Requisition' sidebar shows a status of 'Draft' and a total of '300.00 USD'. A checklist on the left includes 'General', 'Shipping', 'Billing', 'Purchasing Information', 'RF Approval Certification', 'Accounting Codes', 'Internal Notes and Attachments', 'External Notes and Attachments', 'Supplier Information', and 'Final Review', all marked with green checkmarks. The main 'General' section displays cart details: Cart Name (2019-03-13 BUF-DALTONHO 01), Description (no value), Priority (Normal), Prepared by (Dalton Holler), Prepared for (Alison Meadows), Owner Phone (+1 716-645-4547), Campus (University at Buffalo (28030)), and Department (Assistant VP Procurement Services (1107) (0503030000)). Below this is a 'Lines' section for 'Prentice Office Environments' with a table of items.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 office chairs more info...	452135	EA	75.00	4 EA	300.00 USD

Figure 8