

About Cart Management!

Within the Cart Management pages, shoppers are able to:

1. Review own active and draft shopping carts,
2. Create new carts,
3. Assign cart substitutes, and
4. Access assigned carts (both assigned to others and assigned to me).


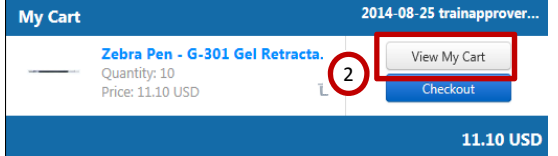
Additional Cart Management Features Include:

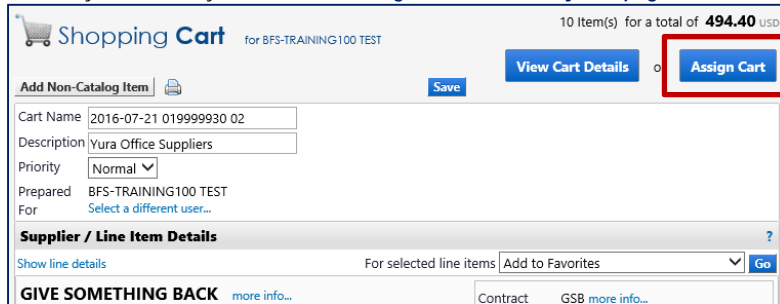
- Ability to filter active and draft carts,
- Ability to filter assigned carts (assigned to me & assigned to others),
- Delete Carts,
- Unassign carts (if assigned),
- Return carts (if assigned), and
- Ability to switch between draft and active carts.

Terminology:

- **Shopper:** Individuals who can shop and create BearBuy shopping carts.
- **Cart Authorizer (Assignees):** Term given to distinguish first shopper from the second when a cart is assigned for review or authorization.
- **Cart:** An electronic basket in BearBuy used to hold items needing to be purchased. BearBuy converts a **Cart** into a **Requisition** once it is submitted into approval workflow

I. Assigning an Active Cart While Shopping

1. Once all items are in your cart, select the **cart icon** from the top right corner of the page. 
2. From My Cart, select the **View My Cart** button. 
3. From your **Shopping Cart**, click **Assign Cart**.
 - a. If you need to **edit** the cart before assigning it, select **View Cart Details**.
 - b. Once you've edited your cart, select **Assign** from the view my cart page.



Shopping Cart for BFS-TRAINING100 TEST 10 Item(s) for a total of **494.40 USD**

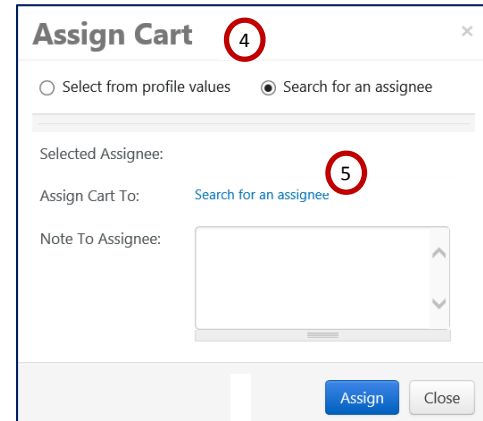
Buttons: **View Cart Details**, **Assign Cart**

Cart Name: 2016-07-21 019999930 02
 Description: Yura Office Suppliers
 Priority: Normal
 Prepared: BFS-TRAINING100 TEST
 For: Select a different user...

Supplier / Line Item Details

Contract: GSB more info...

4. From the pop-up window, if you do not have any saved **Cart Assignees**, select **Search for an assignee**.
 - a. If you have saved **Cart Assignees**, use the **Select from profile values** drop-down menu and move to step 8.
5. Select **Search for an assignee**.
6. From the pop up window, type in the **First/Last name of the Cart Authorizer**, select **Search**.
7. From the search results, select the **Cart Authorizer** you wish to assign this cart to.
8. Enter a **note to assignee**, and then click **Assign**.



Assign Cart

Select from profile values Search for an assignee

Selected Assignee:

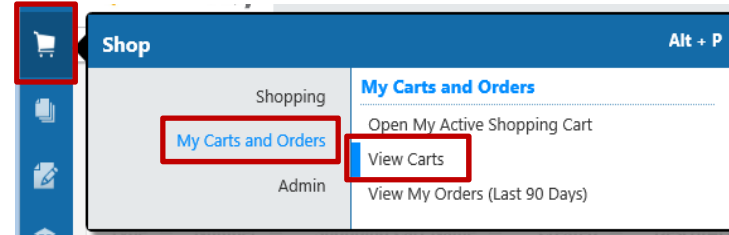
Assign Cart To: Search for an assignee

Note To Assignee:

Buttons: **Assign**, **Close**

II. Access Cart Management Pages

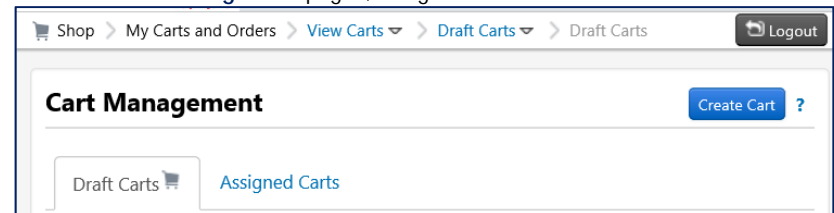
1. Select **Shop** icon
2. Hover over or select **My Carts and Orders**
3. Select **View Carts**



III. Create New Cart

Users can create multiple draft carts, but can only have 1 cart active at a time. To create a new cart, follow steps listed in section II and then:

1. Within the **Cart Management** pages, navigate to and select the **Create Cart** button.



Cart Management

Buttons: **Create Cart**

Links: **Draft Carts**, **Assigned Carts**

BearBuy will automatically redirect you to the newly created empty cart

IV. Viewing Personal Active and Draft Carts

The screenshot shows the 'Cart Management' interface for 'Draft Carts'. Callout A points to the 'Draft Carts' tab. Callout B points to the 'Filter Draft Carts' link. Callout C points to the 'Active' status on a cart row. Callout D points to a green arrow icon on a cart row. Callout E points to the 'Action' column header.

Type	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Action
Normal	1054436	2013-11-04 0199999...	11/4/2013		62.28 USD	View
Normal	1621305	Active 2016-07-21 0199999...	7/21/2016	Yura Office Suppliers	494.40 USD	View
Normal	1804243	2017-03-21 0199999...	3/21/2017	Lab supplies - RUSH order	900.00 USD	View
Normal	19419	Supplies for training...	7/18/2017		134.42 USD	View

- A. **Draft Carts:** Contains unassigned **Active** and **draft** shopping carts
- B. **Filter Draft Carts:** Shoppers can filter their draft carts by cart name, cart number, date created, cart type and cart status.
 - o **Cart Name:** Cart names default to "date cart created + EID + # sequence". It is recommended shoppers rename cart so it's easily distinguishable.
 - o **Cart Number:** Cart numbers are automatically generated when a new cart is created.
 - o **Date Created**
 - o **Cart Types:** N/A. All carts in BearBuy are "Normal"
 - o **Cart Status:**
 - Not returned – cart is unassigned and has not been submitted.
 - Approver Returned – cart submitted but returned
 - Assignee Returned – cart assigned but returned (has not been submitted).
- C. **ACTIVE** sticker: Your active cart will be identified by an **Active** icon. Shoppers can only have 1 active cart at a time.
- D. **Returned Carts:** Returned carts are identified by a green arrow icon (↻). Hovering over the icon will also display "Returned Cart" text.
- E. **Action:** Available actions include, View, Activate and Delete

V. Assigned Carts (Carts Assigned to Me & My Carts Assigned To Others)

The screenshot shows the 'Cart Management' interface for 'Assigned Carts'. Callout A points to the 'Assigned Carts' tab. Callout B points to the 'Filter Assigned Carts' link. Callout C points to the 'Assigned To' column header. Callout D points to the 'Created By' column header. Callout E points to the 'Action' column header.

Type	Cart Number	Shopping Cart Name	Date Created	Assigned To	Created By	Total	Action
Normal	1062264	2013-11-20 0199999...	11/20/2013	lian millward	BFS-TRAINING100 TEST	20.55 USD	View
Normal	1930090	CSP 17.2 TEST SCE...	7/12/2017	BFS-TRAINING100 TEST	BFS-TRAINING102 TEST	2,500.00 USD	View
Normal	1949728	2017-07-20 Carla 02	7/20/2017	BFS-TRAINING100 TEST	Carla Prado	186.63 USD	View

- A. **Assigned Carts:** Contains carts assigned to you by other shoppers and carts you've assigned to others.
- B. **Filter Assigned Carts:** Shoppers can filter their draft carts by cart name, cart number, date created, prepared for user and assigned to user
 - o **Prepared for User** – Individual who created cart
 - o **Assigned to User** – Individual currently assigned to cart (also known as Cart Authorizer)
- C. **Assigned To:** Individual currently assigned to cart (also known as Cart Authorizer)
- D. **Created By:** Individual who created cart
- E. **Action:** Available actions include, View, Unassign (for carts assigned to others), Activate, Return (for carts assigned to me) and Delete

VI. Make Draft Cart Active Cart

There are two ways to make a cart your active cart. You can:

1. **Select the name of the shopping cart** you wish to make active. As soon as you **select the cart name**, BearBuy will automatically open the cart.

Type	Cart Number	Shopping Cart Name
Normal	1054436 Active	2013-11-04 0199999...
Normal	1621305	2016-07-21 0199999...
Normal	1804243	2017-03-21 0199999...
Normal	1941923	Supplies for training...
Normal	1954612	2017-07-25 0199999...

2. Navigate to the **Action** column and:
 - a. **Expand the drop down** next to the cart in question,
 - b. Select **Activate**. Your browser will then refresh and the previous draft cart will now be marked as active.

Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Action
1054436	2013-11-04 0199999...	11/4/2013		62.28 USD	View
1621305	2016-07-21 0199999...	7/21/2016	Yura Office Suppliers	494.42 USD	View
1804243	2017-03-21 0199999...	3/21/2017	Lab supplies - RUSH order	900.00 USD	View
1941923	Supplies for training...	7/18/2017			View
1954612	2017-07-25 0199999...	7/25/2017			Activate

VII. Delete a Cart

1. Navigate to **Shop>My Carts and Orders>View Carts**.
2. Locate the cart you wish to delete. **Expand the Action drop down** and select **Delete**.

Type	Cart Number	Shopping Cart Name	Date Created	Cart Description	Total	Action
Normal	1054436	2013-11-04 0199999...	11/4/2013		62.28 USD	View
Normal	1621305	2016-07-21 0199999...	7/21/2016	Yura Office Suppliers		View
Normal	1804243	2017-03-21 0199999...	3/21/2017	Lab supplies - RUSH order		Delete

VIII. Unassign a Cart

You can only **unassign** carts that have not been 'touched' by the **Cart Assignee**.

1. Navigate to **Shop>My Carts and Orders>View Carts**.
2. Select the **Assigned Carts** tab.
3. Locate the cart you wish to unassign. **Expand the Action drop down** and select **Unassign**.

Type	Cart Number	Shopping Cart Name	Date Created	Assigned To	Created By	Total	Action
Normal	1062264	2013-11-20 0199999...	11/20/2013	lian millward	BFS-TRAINING100 TEST	20.55 USD	View
Normal	1930090	CSP 17.2 TEST SCE...	7/12/2017	BFS-TRAINING100	BFS-TRAINING102		Unassign

IX. Return a Cart

If you have been assigned a cart, you can return it to Assignee.

1. Navigate to **Shop>My Carts and Orders>View Carts**.
2. Select the **Assigned Carts** tab.
3. Locate the cart you wish to return. **Expand the Action drop down** and select **return**.

Type	Cart Number	Shopping Cart Name	Date Created	Assigned To	Created By	Total	Action
Normal	1062264	2013-11-20 0199999...	11/20/2013	lian millward	BFS-TRAINING100 TEST	20.55 USD	View
Normal	1930090	CSP 17.2 TEST SCE...	7/12/2017	BFS-TRAINING100 TEST	BFS-TRAINING102 TEST	2,500.00	View
Normal	1949728	2017-07-20 Carla 02	7/20/2017	BFS-TRAINING100 TEST	Carla Prado		Return

X. View Carts You Previously Submitted

1. Navigate to **Shop>My Carts and Orders>View My Orders (Last 90 Days)**. By default, your 'outbox' defaults to last 90 days but you can change the Date Range field.

Questions?

If you have an issue or problem, contact the BearBuy Help Desk, bearbuyhelp@berkeley.edu.