20/30 Webinar Series: #11
Utilizing the Different Cart Management Features
Agenda

1. About this Session
2. Cart Management
   • Accessing & Creating Carts
   • Editing a Cart
   • Unassigning a Cart
   • Deleting or Withdrawing Carts
3. Resources & Support
4. Question and Answer
About this Session

• Shoppers
• 30 Minutes
• Cart Management
• Question and Answer

Cart Management

15 min

Q&A

15 min
20/30 Webinar Series

Cart Management
Accessing & Creating Carts

In BearBuy, there are two cart statuses; **active** and **draft carts**. You can have **multiple draft carts**, but only one **active cart** at a time.

**Active Cart:** The current cart you will be adding catalog items or forms to.

**Draft Cart:** A cart you created but are not currently adding any items to.

**Creating a Cart**
- A cart will automatically be created when you begin shopping.*

**To access your carts (active and drafts):**
1. Navigate to Shop>My Carts and Orders>View Draft Shopping Carts.
2. You can access any of these carts by clicking the Shopping cart name.
   - **My Returned Requisitions:** All requisitions that were returned after the cart was submitted.
   - **My Drafts:** All carts you own and have not submitted or assigned.
   - **Drafts Assigned To Me:** All carts that others have assigned to you.
   - **My Drafts Assigned to Others:** All carts you’ve assigned to other individuals.

**Creating Multiple Carts**
1. Navigate to Shop>My Carts and Orders>View Draft Shopping Carts.
2. Select **Create Cart**.
3. Click continue shopping to add items to the new cart.

*If you have items already in your cart when you log in, new items will be added to that active cart. If you need to add your items to a separate cart, follow the creating multiple cart steps.
Accessing & Creating Carts

LIVE DEMO
Accessing & Creating Carts

LIVE DEMO
Editing a Cart

Editing Active Cart
1. Click the **shopping cart icon** at the top right corner.
   a. Select **View My Cart** to edit the cart name, cart description, priority, and edit the items in the cart.
   b. Select **Checkout** to edit the cart details including the Org Node, Ship To Address, Chart Of Account associated to the cart, etc.

Editing Draft Carts
1. Navigate to **Shop>My Carts and Orders>View Draft Shopping Carts**.
2. Select the cart by clicking on the **cart number** or **shopping cart name**.
Editing a Cart

LIVE DEMO
Unassigning 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 Draft Shopping Carts**.
2. If the cart is available to be unassigned you will see it within the **My Drafts Assigned to Others**. Click **Unassign**.

<table>
<thead>
<tr>
<th>View Cart</th>
<th>Cart Number</th>
<th>Shopping Cart Name</th>
<th>Date Created</th>
<th>Assigned To</th>
<th>Total</th>
<th>Unassign</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1201526</td>
<td>2014-08-25 trainapprover1 01</td>
<td>8/25/2014</td>
<td>Train Approver17</td>
<td>22.20 USD</td>
<td><img src="Unassign" alt="Unassign" /></td>
</tr>
</tbody>
</table>
Unassigning a Cart

LIVE DEMO
Deleting or Withdraw Carts

You can only delete carts that you have not submitted. You can only withdraw carts that have been returned to you.

1. Navigate to Shop>My Carts and Orders>View Draft Shopping Carts.
2. You will see a Delete or Withdraw option available if the cart can to be deleted or withdrawn.
3. Locate the cart you wish to delete or withdraw and select Delete or Withdraw.

[Table Displaying Returned Requisitions and My Drafts]
Deleting/Withdraw Carts

LIVE DEMO
Resources & Support

• The BearBuy website is the source for the most up to date news, announcements and training resources
  – supplychain.berkeley.edu/bearbuy

• BearBuy YouTube Channel - Short demos videos!
  – youtube.com/user/BearBuyProcurement
  – Subscribe to receive notifications when new videos are posted.

• BearBuy Help Desk #1 place to stop for help:
  • (510) 664-9000 Option 1, Option 2
  • Mon-Fri 8 AM to 5PM
  • Email BearBuy Help (bearbuyhelp@berkeley.edu)
Questions?

Please send all related question to bearbuyhelp@berkeley.edu