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
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.
   a. **My Returned Requisitions:** All requisitions that were returned after the cart was submitted.
   b. **My Drafts:** All carts you own and have not submitted or assigned.
   c. **Drafts Assigned To Me:** All carts that others have assigned to you.
   d. **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.

![Screenshot of a shopping cart interface](image)

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**.

![My Drafts Assigned to Others Table](chart.png)
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**.

![Image of table showing returned requisitions and drafts]

- **My Returned Requisitions**
  - Active Cart
  - Cart Number
  - Shopping Cart Name
  - Date Created
  - Cart Description
  - Total
  - Withdraw

- **My Drafts**
  - Active Cart
  - Cart Number
  - Shopping Cart Name
  - Date Created
  - Cart Description
  - Total
  - Delete
Deleting/Withdraw Carts

LIVE DEMO
20/30 Webinar Series

RESOURCES & SUPPORT
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