

# Shopper Role/ Assign Carts

If you only have a shopper role in SpartanMart, you must assign your cart to a requestor with maintenance access to the funds. Once the cart has been assigned, the requisitioner can place the order.

1. Start by setting up your Profile defaults (See **User and Profile Setup** instructions).
2. Create the order using the Training Materials/How-Tos: **Ordering** instructions.
3. With the **Active Cart** selected, give the cart a name by entering it in the Cart Name text box and click Save.

**Note:** Naming the cart according to what you are purchasing might be helpful. You can also give the cart a description, but neither is required.

- a. You can Name your cart for easy information to reorder the same items (Optional)
- b. You can create a description if you need to (Optional)
- c. You can pre-approve Freight charges (Optional)
- d. You can not change the QTY's from a punchout order once it becomes a SpartanMart Cart. You would need to delete this cart and start over.
- e. Click Proceed to Checkout
- f. **Do not click Assign cart** at this step as you will lose the ability to enter accounting code and index(fund) information.

Shopping Cart • Shopping Cart

Search for products, suppliers, forms, part number, etc.

Cart Name: 2023-10-19 AWBIRCHE 01

Description:

Priority: Normal

Freight/Handling Pre-approved?

Bankwire

Proceed to Checkout

Summary

Details

For: Allysa Robinson

Total (779.32 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Subtotal \* 779.32

Shipping 0.00

Handling 0.00

Total \* 779.32

3 Items

Granger - 3 Items - 779.32 USD

SUPPLIER DETAILS: VN Purchasing Vendor 2 : Dept 874072168, Palati...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 TK92141391T Mop Bucket and Wringer Wringer Type Down Press Canaciv R 3/4 gal Bucket Material Plastic Anti-Spill No Includes	2PYH5	EA	84.44	2 EA	168.88

4. Update the Accounting Codes and the Internal/ External Document sections by clicking on the pencils at each area.

Accounting Codes

Chart	Index	Account	Activity
G	117042	201210	no value
G	Purchasing	Household - Janitorial Supplies	

Internal Notes and Attachments

Internal Note: no value

Internal Attachments: Add

External Notes and Attachments

Note to all Suppliers: no value

Attachments for all suppliers: Add

Accounting Codes Section: the Index # is also known as your Fund#. Click 'Save' when you are done. Use the arrow keys to search for the account #s if needed.

## Edit Accounting Codes

### Accounting Codes

Chart *	Index *	Account *	Activity
<input type="text" value="β"/>	<input type="text" value="117042"/>	<input type="text" value="201210"/>	<input type="text" value="Search"/>

★ Required fields

- If you are done with adding the Shipping info, Accounting Info, Internal & External Notes you are now ready to either Assign Cart or Place order.
  - All Spartanmart users have the ability to assign the cart to someone with Banner Budget Authority for the Fund#(Index) you listed on the Requisition.
  - To 'Place the Order' you must be listed as a requestor on your user profile and have Banner Budget Authority for the Fund#(Index) you listed on the Requisition.
  - If you are unsure, check before you click Place the order. Your cart will be Automatically rejected/returned if you do not have the permissions to place the order. You will have to start all over if this happens, as Punchout orders can not use the "Copy to new cart" feature.**
- Click 'Assign Cart'.

Search (Alt+Q) 779.32 USD 4 1

- Pop up will appear, Click 'Search' or Select if you already have assigned cart people on your profile.

### Assign Cart: User Search

Assign Cart To:  [SELECT](#) or [SEARCH](#)

Note To Assignee:

8. If you have people on your profile to assign your cart to Click 'Select' Then click that person's name then click 'Assign'. Optional Note section if you need to use it.

Assign Cart: User Search

Assign Cart To:

Note To Assignee:

ANTHONY KILAR

ROSS RICK

JANET HOLCOMB

KIMBERLY SAWYER

Assign Close

9. This is what the Search box looks like. Its pretty easy to search by last name or email address. You have to click the + sign to select them

User Search

Last Name

First Name

User Name

Email

Department

Role

Results Per Page

Search Close

Name	User Name	Email	Phone	Action
Robinson, Allysa	AWBIRCHE	awbirche@uncg.edu	+1 336-334-5997	+

Click box 'Add to Profile' to use that person in the future. Then Click 'Assign'.

Assign Cart: User Search

Assign Cart To: Robinson, Allysa

SELECT or SEARCH

Add to Profile

Note To Assignee:

Assign Close

10. You will get a confirmation that your cart was Assigned to someone to process.

The screenshot shows a web application interface. At the top, there are navigation links: 'Simple' (selected), 'Advanced', 'Go to: Non-Catalog Item | Favorites | Forms | Shop | Quick Order', and 'Browse: Suppliers | Categories | Contracts | Chemicals'. Below this is a search bar with the placeholder text 'Search for products, suppliers, forms, part number, etc.' and a magnifying glass icon. The main content area has a green header with a white checkmark and the text 'Cart Assigned'. Below the header, there are two columns: 'Requisition Summary' and 'Options'. The 'Requisition Summary' column contains the following information: Requisition number: 178406678 (highlighted with a red box), Cart name: 2023-10-19 AWBIRCHE 01, Requisition total: 779.32 USD, and Number of line items: 2. The 'Options' column contains three links: 'Create new draft cart', 'Recent orders', and 'Return to your home page'.

Requisition Summary		Options
Requisition number	178406678	<a href="#">Create new draft cart</a>
Cart name	2023-10-19 AWBIRCHE 01	<a href="#">Recent orders</a>
Requisition total	779.32 USD	<a href="#">Return to your home page</a>
Number of line items	2	

As long as that person has notifications turned on for assigned carts they should get a notification or an email from SpartanMart letting them know that they have a cart that has been Assigned to them.

They will be person to Click 'Place Order' Once they Click Place Order, the requestion will begin the process into turning into a Purchase order.