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.

   <mark>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.</mark>
   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.

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

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
G	117042	201210	Search

★ Required fields

5. 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.
    a. 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.
    b. 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.
    c. **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.**
6. Click 'Assign Cart'.

Search (Alt+Q)   779.32 USD 🛒   ♡ |◄ 4   🔔 1 👤

👁   🖨   ⑦   ⋯   Assign Cart   Place Order

7. 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: Kimberly Sawyer
SELECT ▼ or SEARCH

Note To Assignee:

Assign   Close

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.

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

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

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

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.