In This Guide

This guide demonstrates how to manage your shopping carts and requisitions in CrimsonCorner. This guide discusses:

- Assigning carts
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- Withdrawing requisitions

Procedure – Assigning Carts

1. Once items have been placed in a Shopper’s shopping cart, the cart should be assigned to a Requester for further processing.
2. To assign a cart, navigate to the Active Shopping Carts. (See Assigning a Cart for more information.)
3. Click the Assign Cart button.
4. A popup window will appear and you should choose to Search for an assignee.
5. Another popup window will appear and you should type in the last name of your requester, click Search and then choose Select to the right of the Requester’s name.
6. If this is a Requester that you will use in the future, click the Add to Profile box.
7. Once you have added a Requester to your profile, you will not need to search for them in the future. Instead, you will have an option to Select from profile values and you can click your Requester’s name from there. Note that you can add multiple Requesters to your profile.
8. If you would like, you can enter in a note to your Requester regarding the order. This note will be visible in the email that they receive once you assign your cart to them.
9. Click Assign.
10. You will then receive a congratulations email confirming that your cart has been assigned to the Requester for action.

Procedure – Unassigning Carts

1. If a Requester is unable to process an assigned shopping cart, the Shopper can unassign the cart from them and resubmit it to a new Requester.
11. To unassign a cart, navigate to the My Drafts Assign to Others section. (See Assigning a Cart for more information.)
1. From here, you can see what carts have been assigned and who they are assigned to.
2. To unassign a particular cart, click Unassign to the right of the shopping cart.
3. This unassigned cart will automatically become your active cart and you will be returned to the shopping cart page. From here, you can choose to assign your cart to another Requester.

Procedure – Modifying Carts
1. Once items are in your cart, you can modify the items from the My Active Shopping Cart screen.
2. Navigate to the My Active Shopping Cart screen by selecting from the main menu Shop » My Carts and Orders » Open My Active Shopping Cart.
3. The name on the shopping cart can be modified. Simply click in the Name this cart section and delete the default shopping cart name.
4. Type in a more appropriate shopping cart name. Remember that you can search for carts by their shopping cart name.
5. Once the new name has been entered, click the Update button below to save the new cart name.
6. Items in the cart can be manipulated. By clicking on the Empty cart button, all items in the cart will be deleted.
7. By selecting the Remove button, the particular line in the cart selected will be deleted.
8. Forms in the cart can be saved as Favorites and easily accessed again at a later time.
9. To save a form as a Favorite, click the Add to Favorites button on the form line.
10. A new window will appear and under Step 1 you will have the option under Item Nickname to type in a description for the form.
11. Under Step 2 you can choose a folder to put the form in. Select New » Top level personal folder and another popup will appear. From here you can give the folder a name and click Save.
12. When you are returned to the Favorites popup, click on Submit and then Close.

Procedure – Consolidating Carts
1. By selecting a particular line in the cart and clicking on the More Actions dropdown, the item can be moved to another cart to consolidate orders.
2. Simply click the More Actions button and select Move to Another Cart.
3. A new popup window will appear and you can select which cart you want to move the item into.
4. Select the cart and click the Move button at the bottom of the screen and then Close the window.

Procedure – Copying Requisitions
1. To copy a previously submitted requisition, navigate to the requisition and click on the requisition number. (See Document Search for more information on locating a requisition.)
2. From the Available Actions dropdown menu, choose Copy to New Cart and click Go.
3. The requisition will be placed in a new shopping cart.
4. Please note that when copying a requisition all elements of the requisition are copied including accounting codes and shipping information.

Procedure – Withdrawing Requisitions

1. Requisitions can be withdrawn from the approval workflow if they have not been fully approved and turned into a Purchase Order.

2. To withdraw a previously submitted requisition, navigate to the requisition and click on the requisition number. (See Document Search for more information on locating a requisition.)

3. From the Available Actions dropdown menu, choose Withdraw Entire Requisition and click Go.

4. A popup menu will appear asking you to enter in a reason for withdrawal. Enter in a reason and click the Withdraw Enter Requisition button.

5. The requisition will be withdrawn from the workflow process.